



CASE STUDY: FINANCIAL SERVICES PROVIDER

INDUSTRY

Insurance and Financial Services

COMPANY BACKGROUND

A global international insurance and financial services organization, with operations in more than 130 countries and jurisdictions. Member companies serve commercial, institutional and individual customers through the most extensive worldwide property-casualty and life insurance network. Global businesses also include retirement services, financial services and asset management.

KEY OBJECTIVE

To improve forecasting and real-time management in alignment with its new marketing strategy



CLIENT CHALLENGES

- Assistance with forecasting and planning for its new television advertising strategy
- Need to evaluate its new forecasting model developed for its new television advertising strategy
- An evaluation of its real-time management strategy in light of their new television advertising strategy



ICMI SOLUTIONS

- Developed a process for aligning marketing strategies and call center operations
- Developed new key metrics to balance the cost of DRTV marketing with the increased costs at the operational level
- Identified several gaps in the existing forecasting model and developed alternative processes to eliminate the gaps
- Identified several organizational improvements that allowed the entire operation to better utilize their workforce while improving their ability to react to TV-driven call spikes more quickly and effectively