

ActionIQ for Insurers

Optimize and Personalize Engagement Across Policyholder Journeys

The ActionIQ Customer Experience Hub (CXH) enables insurers to shift to a digital-first ecosystem and create real-time personalized experiences. By providing all teams with direct but governed self-service access to customer data, insurers can reduce complexity and drive policyholder acquisition, engagement and retention.

Why ActionIQ

Select the CXH module needed based on your business requirements:

Customer Data Platform

Centralized platform combining all historical and real-time data into unified policyholder and household profiles.

Journey Management

Automated real-time recommendations and next-best-action models empowering marketers to drive value across policyholder touchpoints.

Audience Center

Intuitive user interface allowing agents, customer service, brokers and carriers to independently access and activate audiences in real time within a controlled and permission-based user interface.

Real-Time Customer Experience

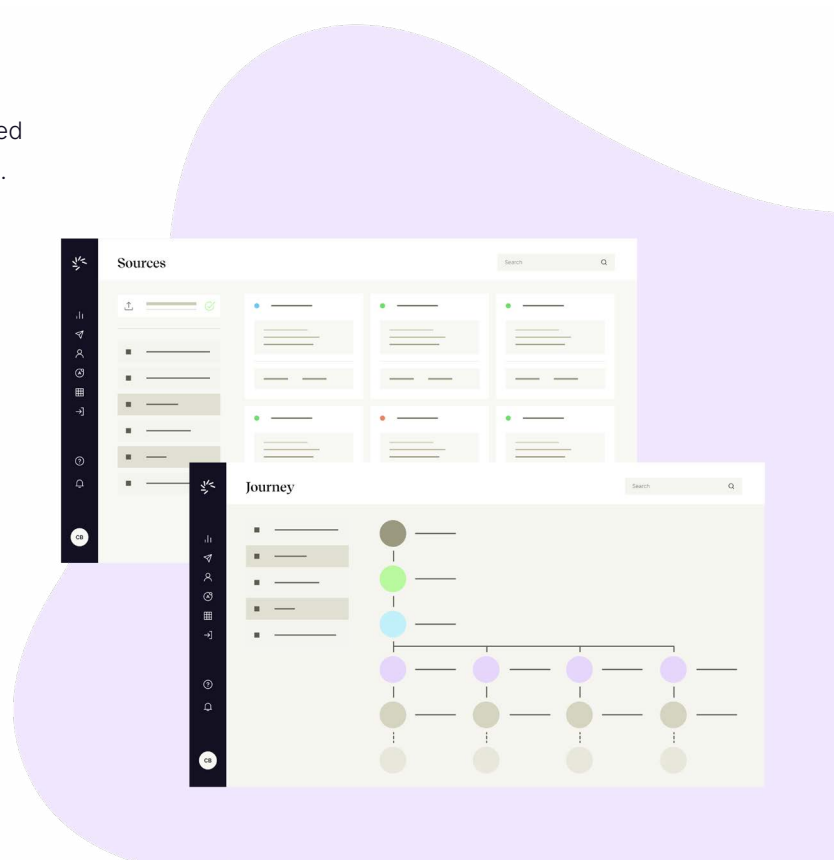
Powerful automation enabling insurers to discover audiences and orchestrate experiences at scale and in real time.

What Can ActionIQ Do for You?

Uncover real-time, actionable insights and deliver personalized experiences that are proven to lift engagement and retention.

KEY CAPABILITIES

- ✔ Identity resolution and enrichment
- ✔ Complete policyholder and household profiles
- ✔ Self-serve policyholder insights and segmentation
- ✔ Flexible and scalable data management
- ✔ Predictive analytics and next-best-action
- ✔ Real-time omnichannel journeys
- ✔ A/B testing and measurement
- ✔ Omnichannel activation



Use Cases

Insurers use the ActionIQ CXH to operationalize their customer experience strategy, as well as orchestrate and activate journeys across the entire policyholder lifecycle. With ActionIQ, teams have a centralized hub that enables them to access insights and activate experiences in real time.

Identify Anonymous Prospects Searching for New Policies. Understand unknown web traffic and trigger experiences that incentivize visitors to identify or re-engage.

Seamless Policyholder Journeys. Orchestrate real-time campaigns across all channels, from call centers and direct mail to paid media and website interactions.

Enhance Engagement Through Personalized Quotes. Offer personalized quotes based on the policyholder's needs and risk tolerance.

Deepen Customer and Agent Relationships. Improve sales and servicing by pushing the latest client activities (e.g., products viewed, research accessed) to Advisors and Call Center Reps.

Provide Agent Education. Drive new insurance sales by educating agents, IMOs, or partners on product offers or announcements.

Execute Coordinated Experiences Across Stakeholders. Ensure agent preparedness and coordinated CX by activating campaigns simultaneously across Agents, Brokers and to client.

Create Automated Life Event Campaigns. Use data to automate communications based on the policyholder's or household's life events.

Build Churn Propensity Models. Predict churn by identifying at-risk prospects or policyholders and execute campaigns to keep them engaged.

Optimize Collections Communications. Improve collection success by identifying customers behind on payments and tailoring collection journeys based on state-by-state regulations.

Increase Policyholder Retention. Improve policy renewal rates and retention by building proactive renewal journeys for individual or business clients nearing policy end.

Industry Leaders Choose ActionIQ



“We can no longer spend days defining audiences and moving levers and knobs to launch a campaign. Having all of our data consolidated and being able to push audiences to platforms and learn something fast is really powerful for us. ActionIQ allows us to streamline, make decisions and test and learn quickly.”



Verlyn Fischer
Principal Product Manager

