



# Historic impact.

Royal London uses Adobe Campaign to tap into omnichannel customer data and provide seamless online and offline experiences.



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*Ajay Solanki, Consumer Digital Lead, Royal London Mutual Insurance Society Limited*

## SOLUTION

Adobe Experience Cloud, including the Adobe Campaign solution within Adobe Marketing Cloud  
Adobe Customer Solutions, including Adobe Digital Learning Services

## RESULTS



Delivered **EXCEPTIONAL** omnichannel customer experiences



Achieved 12-month **ROI** target in 8 months



Successfully deployed in only **12 WEEKS**



Exceeded **REVENUE** goal by 58%



## Royal London Mutual Insurance Society Limited

Established in 1861

Employees: More than 3,000

London, United Kingdom

[www.royallondon.com](http://www.royallondon.com)

### CHALLENGES

- Connect customer data from multiple sources to develop complete customer profiles
- Develop seamless cross-channel customer journeys
- Improve lead acquisition, engagement, and conversion

### USE CASES

- Campaign Orchestration
- Customer Intelligence

### Successfully navigating risk

Finance, pensions, investments, and insurance—for many—are difficult subjects to discuss or understand. Royal London Mutual Insurance Society Limited makes these topics more approachable for clients and investors with straightforward tools, information, and services. As a mutual insurance company, its customers have not just invested in policies that will shape their futures, they are also counting on the health of the company. In turn, Royal London puts customers at the heart of everything it does to help them get the most from their portfolios over their lifetimes.

With light-hearted ads and a focus on long-term financial planning, Royal London transforms clients' uncertainty into optimism. Royal London also works tirelessly to earn customers' trust and cultivate long-term relationships. The approach has positioned Royal London as the UK's largest mutual life, pensions, and investment company with more than £110 billion in assets under management and 8.8 million policies.

"Our business is built on helping our customers understand and manage risk," says Ajay Solanki, Consumer Digital Lead at Royal London. "Key to achieving this is setting realistic expectations with customers and providing them with clear communications. The importance of this helps shape our overall approach to marketing."

Royal London's direct-to-consumer business was the first to embrace a more customer-centric way of working by making extensive use of data to reshape how customers interact with the company across multiple touchpoints. Based on the early success with this approach, the company is moving toward providing customers with unified experiences across devices that cover all Royal London products and services.

"We knew that by focusing first on our direct business we could learn the most about the largest audience possible and in turn have the greatest impact on them and our business," says Solanki. "The insights we gleaned could then be applied to improve the performance of marketing programs companywide."

### A look back

As the UK's largest mutual life, pensions, and investment company with a propensity for always using the latest technologies, Royal London had many legacy systems. The company needed to quickly roll out a new campaign management platform to keep pace with changing customer demands and market conditions. At the same time, it needed to standardise on a single marketing platform to help marketers and non-marketers tap into data and reach customers across varying channels and devices.

To meet its goals, the company needed to centralise access to data from online and offline channels, empowering staff to better control what information is used and how. Royal London also saw an opportunity to more accurately attribute activities and preferences to clients and better understand customer journeys as they click on, call about, and purchase financial products through different channels.



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In addition, Royal London wanted to more efficiently send emails to customers about its financial products and give customers the tools to answer more of their questions online instead of relying on call centers. By giving customers better access to tools and information through emails, its website, and mobile content the company knew it could build longer-term relationships with customers.

“As a company, we like to look back on our heritage with pride, appreciate what once was, but also what we can be,” says Solanki. “Adobe Experience Cloud gives us a foundation for understanding what is going on now and the trends that will shape the future. With this, we can continue to anticipate customer needs to drive our success and customer values.”

### From past to future

To help transition from legacy systems to Adobe Experience Cloud, including Adobe Campaign, Royal London accelerated its implementation by working with Adobe Customer Solutions. With a digital project team of 15 members at Royal London, Adobe Customer Solutions helped to get the new platform to market within 12 weeks without disrupting services.

The Adobe team provided guidance on best practices and hands-on support while the company ramped up staffing and built skillsets internally. Adobe Digital Learning Services also provided training on Adobe Campaign to the staff at Royal London to help the company learn how to build personalised campaigns. This enabled Royal London to establish a stable, agile platform for long-term success that could also address today’s customer needs and seasonal trends. Adobe Customer Solutions also helped establish the foundation for the company’s internship program.

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Using Adobe Campaign, Royal London connects its advertising, CRM, email, direct mail, call center, online, and mobile app data to develop a comprehensive omnichannel view of customer journeys. The platform also enables Royal London to predict what clients will want and do next as they mature financially, helping the company to personalise interactions and further earn customer trust by focusing on their unique needs throughout their lifecycle with Royal London.

Royal London is working hard to make sure information learned about a customer through one channel is used effectively across all interactions with the company. If a client sees a television ad and subsequently visits the company’s promotional site with a unique URL, Royal London can track the lead to the advertisement.

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Then, as individuals click through pages and complete quote requests, the company learns about what a customer is most interested in and can provide them with more information about those services. These interactions may include re-engagement emails if a prospect abandons a quote, targeted landing pages when a prospect returns, sending product information via mail, and more—all personalised to a prospective customer’s financial interests.

The more targeted campaigns and emails have achieved exactly what Royal London marketers set out to do—and more. Targeted abandonment emails achieved up to 60% open rates and 13% click through rates. Revenues for this and similar campaigns have also exceeded initial goals by more than 58%.

### **Moving at lightning speed**

Once Royal London has a solid understanding of what its customers want and a solid strategy on how to respond, the insurer uses Adobe Campaign to take digital interactions one step further. For example, via email, the company uses email templates with modular copy and images, as well as personalised messages that resonate with its audience. Using profile information Royal London can create custom versions of communications for each segment, target delivery times for optimum engagement, and increase relevancy.

“A basic email campaign used to take two to three weeks to create manually and launch,” says Solanki. “Using Adobe Campaign, we’re more automated and can deliver multiple campaigns in a week that include more targeted communications. This results in better customer experiences.” Solanki adds that increased automation has enabled marketers to spend more time analysing performance and customer behaviours to improve campaign impacts.

“When we started working with Adobe Campaign, one of the first things we did was establish annual targets for use cases and business objectives,” says Solanki. “Between the accelerated ramp up supported by Adobe Customer Solutions and the power of Adobe Campaign, we surpassed year one ROI expectations within eight months.” Solanki also notes that the company achieved 158% of its revenue goal during the 12-month period.

In addition to delivering great returns, Royal London will look to digital channels to create higher-impact customer experiences. Using data from its Microsoft Dynamics CRM and other business areas, the company will further refine customer profiles and to boost customer satisfaction. Adobe Campaign will also help to connect more customer-facing channels and create more seamless customer experiences as the company moves toward true omnichannel engagement.

## SOLUTION AT A GLANCE

Adobe Experience Cloud, including:

Adobe Marketing Cloud

- Adobe Campaign
  - Campaign Management
  - Integrated Customer Profile
  - Personalised Targeting
  - Cross-channel Execution

Adobe Customer Solutions

- Adobe Digital Learning Services

Using data from its Microsoft Dynamics CRM and other business areas, the company can connect data from multiple customer-facing channels to strengthen marketing impacts and integrate lead scores into customer profiles to further personalise interactions as the company delivers truly unified omnichannel experiences.

In the future, Royal London is also introducing Adobe Campaign training as part of its apprenticeship program, instilling the importance of a data-driven methodology in the next generation of marketers.

“Adobe Experience Cloud enables us to mature our business to meet the demands of our customers now and in the future,” says Solanki. “We’re confident that we have a stable technology and support foundation to continue to push the boundaries of what we can do as we support our customers through every stage of their lives.”

For more information

[www.adobe.com/experience-cloud.html](http://www.adobe.com/experience-cloud.html)

[www.adobe.com/experience-cloud/service-support.html](http://www.adobe.com/experience-cloud/service-support.html)



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