www.xgrid.co

An Insurance Solutions Company in the US Boosts MQL Conversions & Email Engagement with HubSpot

Client Overview

Our client is a leading provider of tailored insurance solutions in the US, who sought to optimize **customer interactions, streamline lead generation, and ensure data-driven decisions**. With a vision to enhance their marketing and sales processes, they partnered with us to implement and maximize HubSpot's capabilities.

The Challenge

Our customer was not fully utilizing their HubSpot instance and faced operational hurdles, including:

Inefficient Data Management

Disjointed workflows and siloed systems created inefficiencies in tracking, analyzing, and leveraging lead data.

Manual Processes

Time-consuming manual efforts in engaging new and existing customers slowed productivity and impacted personalization.

Lead Prioritization Issues

Identifying and converting high-quality leads was a challenge without a behavior-driven scoring system.

Fragmented Customer Journeys

The absence of automated campaigns led to inconsistent onboarding, renewal, and engagement experiences.

Recognizing the need to modernize and scale their customer engagement efforts, our client sought a robust solution to streamline their marketing operations and deliver personalized, and seamless experiences across the customer lifecycle.

The Strategy

We conducted a thorough audit of the system to analyze the current state and identify priority areas for improvement through incremental changes. Our efforts were centered on three key focus areas

Data Management & Optimization

Ensure data integrity while improving engagement and targeting.

Workflow Enhancements

Automate and scale key processes like lead nurturing and customer onboarding.

Advanced Attribution & Reporting

Develop deeper insights into customer behavior to enhance decision-making.

The Solution

By leveraging HubSpot, we executed a comprehensive implementation strategy focused on automation, segmentation, and personalization.

1. Redefining Lead Lifecycle Stages, Audience Segmentation, and Behavior Scoring.

We streamlined our client's lead lifecycle stages in HubSpot to improve pipeline visibility and alignment across teams. A new structure was introduced for categorizing subscriber, lead, MQL, Opportunity, & Customer.

This allowed for seamless collaboration and more targeted engagement at every stage.
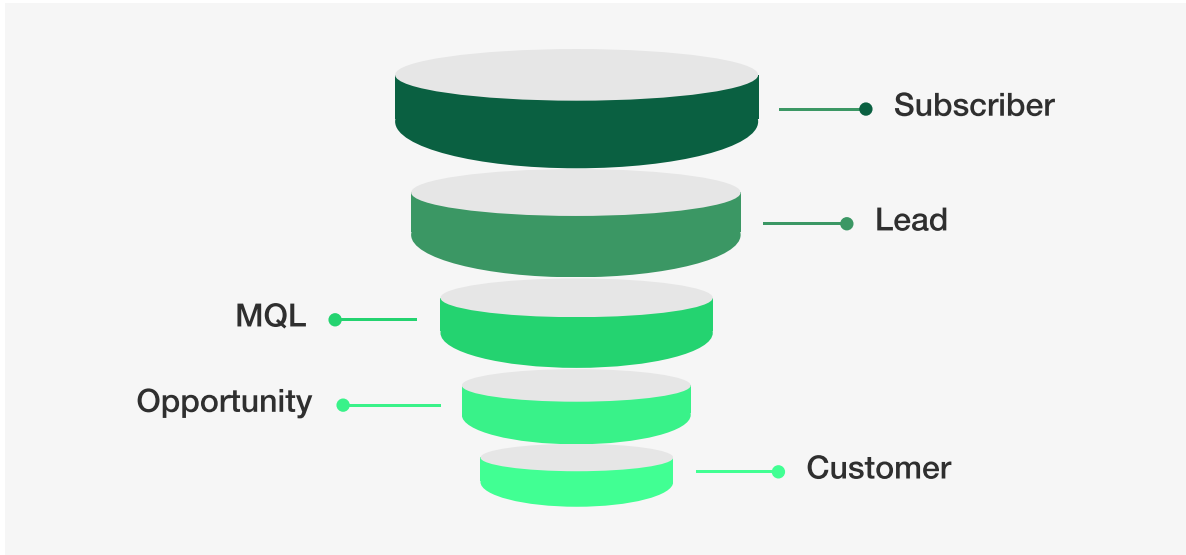
Lead Lifecycle Journey Visualization

We also helped the customer define MQL thresholds using key engagement triggers (e.g., time spent on site, downloads, and social media shares).

2. Implementing Behavior-Based Lead Scoring

A new scoring model prioritized leads based on high-value activities such as time spent on-site, engagement with insurance FAQs, and downloading policy summaries.

This helped the customer identify and focus on MQLs with the highest potential, reducing time wasted on low-quality leads.
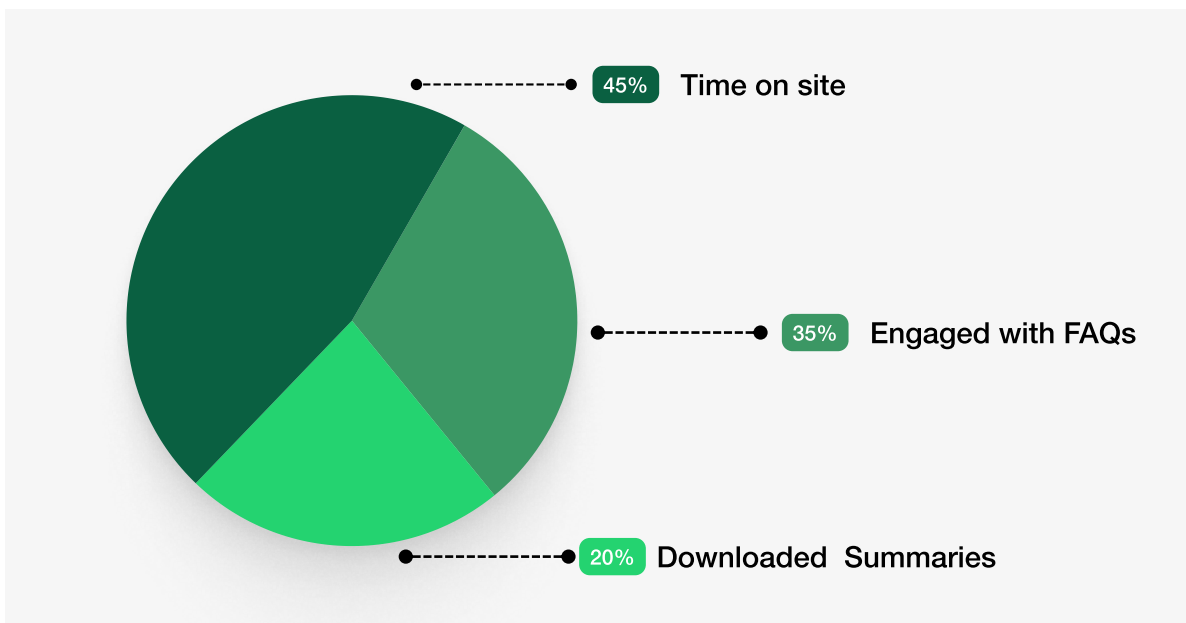
3. Automated Email Campaigns Across the Customer Journey

We introduced multiple drip campaigns tailored to specific customer needs including a:

New Customer Welcome Campaign, which included a three-part email sequence to onboard new customers.

Winback Strategies for Lost Customers: A five-week drip campaign to re-engage inactive customers.

Cross-Sell Campaign for Bundled Packages to introduced bundled insurance options through a three-email series:

Referral Program Campaign: To encourage customer referrals with a three-email drip sequence.

Renewal Reminder Campaigns: A six-email sequence designed to ensure timely policy renewals.

4. Enhancing & Cleaning Workflows, Forms & Data

We implemented an automated pipeline using a third-party tool to extract marketing data from the client's ERP system and seamlessly integrate it with HubSpot.

Data Cleanup / Form Migration
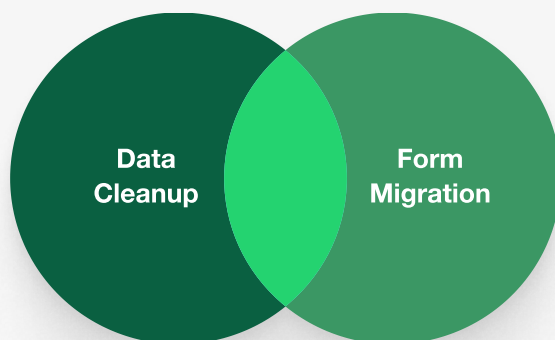
- Conducted regular audits, deduplicated records, and optimized targeting
- Replaced Gravity Forms with HubSpot native forms, eliminating inefficiencies, enhancing data security, and enabling real-time CRM synchronization.

5. Chatbot Implementation for Lead Generation

Deployed a lead-generation chatbot to capture, qualify, and route leads efficiently. Key highlights:

User Engagement: Designed conversational flows to educate users about policies and collect key lead information.

Integration with CRM: Synced captured leads directly to HubSpot, streamlining follow-ups.

Optimization: Monitored engagement rates and refined conversation logic to enhance performance.

Results and Impact

1. **Improved Engagement:** Personalized drip campaigns increased email open rates and engagement by 30%.

2. **Higher Lead Conversion:** Behavior scoring and segmentation boosted MQL conversion by 25%.

3. **Efficient Processes:** Automated workflows reduced manual intervention, saving 20+ hours weekly for the sales team.

4. **Renewal Retention:** Multi-touch renewal reminders improved policy renewal rates by 15%.

5. **Clean Data:** Enhanced data quality enabled precise targeting and improved email deliverability.

6. **Seamless User Experience:** The chatbot facilitated smooth lead capture, resulting in a 20% increase in leads.

Conclusion

By partnering with us for HubSpot implementation, our client achieved a scalable, data-driven approach to customer engagement.

This transformation empowered them to deliver tailored experiences, optimize processes, and drive sustainable growth.

The next phase focuses on **attribution reporting, advanced automation,** and **expanding system capabilities** to ensure continued success.