

# Individual Customer Marketing Analysis Module

**Client Value Proposition:** Segment and target marketing to individuals based on customer demographics, financial position, retirement goals, customer value to most efficiently acquire new participants, increase deposits, and retain valuable customers

**Strategic Value:** Leverage information about individual customers to design, develop, and deliver individual marketing campaigns, as permitted by plan sponsors. Increase individual customer value by targeting specific individuals for specific campaigns. Use individualized campaigns to drive higher enrollment, increase deferral rates and deposits, and improve retention.

**Information and Analytical Capabilities Provided:**

- Analyze individual customer attributes and preferences to define segments and target markets for campaigns
- Capture changes in customer behavior and value that can be attributed to marketing campaigns
- Measure response rates and return on marketing investment (ROMI) for each campaign

**Example Analyses:**

- What are campaign response rates by customer life stage and demographics?
- Which individual marketing channels have the highest response rates?
- What is the number of new participants and deposits over time?
- What is the acquisition cost per participant?
- What are campaign response rates by participant retirement goals and financial situation?

***Meeting Retirement & Investor Services Industry Challenges***