

Successful lead management with BSI at Gothaer

A trigger-based sales campaign called “Personalized insurance check” with a 92% e-mail open rate and 17% sales consultation sign-up rate

Baden, October 27, 2022 – **Gothaer is celebrating a campaign success with a trigger-based initiative for customers who have moved. The e-mails sent as part of the “moving campaign” were opened by 92 percent of recipients; of those, 17 percent subsequently scheduled a sales consultation phone call. Gothaer implemented the campaign with the marketing automation solution by software company BSI.**

Insurers no longer exclusively use their products to differentiate themselves from their competition; instead, they increasingly set themselves apart with service and customer experience. This development is driven by the digital transformation of all areas of life, and the pandemic has clearly accelerated it ([McKinsey, 2020](#)). InsureTechs successfully use this approach because they are where their customers are, 24/7. This makes it all the more important for traditional insurers as well to be able to offer their customers the right product at the right time.

This is what the Gothaer project team in charge of the moving campaign aspired to: To offer insurance services all around the topic of “home & household” at a time when their customers genuinely need them. To accomplish this, they used BSI’s marketing automation solution, which links customer data from various sources. They designed a so-called trigger campaign, an automation process with a fixed trigger; in this case, it was the address change: Customers who change their address in the “Meine Gothaer” (“My Gothaer”) customer portal automatically receive an e-mail that takes them to a personalized landing page. There, customers find useful tips on the topic of moving as well as an offer involving a personalized insurance check. Merula Hohns, Manager Campaign and Lead Management at Gothaer, takes stock: The campaign has had significantly better outcomes than typical campaigns, which have an average e-mail open rate of 25 percent and a landing page click-through rate of 7 percent. These and other successes motivate us to continue along our chosen path towards more personalization and event-related customer communication.”

In the future, Gothaer plans to launch additional trigger-based campaigns with BSI, thus contributing to the company’s growth targets.

The Gothaer Group has used BSI's CRM solution as an agency system since 2016. In 2018, the insurer expanded its solution landscape to include the CRM system for broker sales, and in 2019, it added BSI BRM as a central information and management solution for partner sales.

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About BSI

With its BSI Customer Suite, the Swiss software company BSI provides a comprehensive platform for the digital transformation of customer relationships. It offers everything needed for an outstanding customer experience in the retail, banking, insurance and energy & utility industries. At the core of the innovation is the company's many years of industry experience. In the insurance industry, BSI is considered the market leader for CRM software, which 130 banks, insurers and trading companies use to reach around 27 million end customers across Europe. Founded in Baden, Switzerland, in 1996, BSI has about 400 employees and 7 additional offices in Germany and Switzerland. BSI's customers include companies and organizations such as ADAC, Signal Iduna and HDI and other market-leading companies throughout Europe. www.bsi-software.com