



## Progressive Insures Integrated Approach To Expanded WebEx Agent Education

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Paul Booyens, Project Manager for the WebEx initiative at Progressive



### COMPANY PROFILE

Progressive Insurance

### HEADQUARTERS

Cleveland suburb of Mayfield Village, OH

### SIZE

450+ U.S. Offices  
28k+ Employees

Act-On Customer Since 2009

In business since 1937, the Progressive Group of Insurance Companies has grown to one of the country's largest insurance groups. Through innovations such as the first “name your price” tool and their popular TV ads featuring bubbly pitchwoman Flo, Progressive has become synonymous with convenient and easy to purchase insurance options. In addition to purchasing via phone and online, the company offers its products through more than 30,000 independent insurance agencies, which range in size from 1 to 100 employees and are geographically spread throughout the country.

### THE CHALLENGE

Given that these independent agents also offer competitive brands, the company was looking to set up regular communications in order to stay top of mind with them. Since the company's field team couldn't possibly hold individual face-to-face meetings with 30,000 agents all over the country on a regular basis, Progressive began using Cisco WebEx Event Center for a weekly webcast series, starting in June 2008.

Based on the early success with WebEx, Progressive looked to expand the reach and frequency of the webcast series. Although the Progressive team had little problem hosting an increased volume of webcasts on the WebEx platform, the company quickly felt the strains of managing the communications stream of invitations, confirmations and reminders using manual processes and legacy event management systems.

“We had to go through our event department to channel invitations for these webcasts and they were using a system

that was outdated, so the process was time consuming and lacked integration” said Paul Booyens, Project Manager for the WebEx initiative at Progressive. “Also, the data for our lists and registrations had to cross through two different internal systems, so it was hard to pull data. With those processes it would have been too hard to ramp up our webcast schedule, and the quality would have suffered.”

While Progressive was extremely excited about the collaborative capabilities of WebEx, the company was looking for a complementary tool with added analytics and engagement features. “WebEx is a great tool for executing the event, but we were looking to supplement that platform with a more robust promotional tool for the beforehand and the follow up emails,” Booyens said.

### THE SOLUTION

In early 2009, Progressive signed on with Portland, Oregon - based Act-On Software, Inc., an innovative provider of integrated online marketing services for the Fortune 5,000,000. Act-On integrates with the WebEx service platform and adds comprehensive pre- and post-event marketing capabilities around webinars.

The Act-On Marketing Service enabled Progressive to close the loop with webinars.

On the front end, Act-On's solution set up automated promotion and reminder programs to maximize attendance. On the back end, the tool provided Progressive with webinar attendance and participation data for prospect scoring and in behavioral segments for follow-up.



The end-to-end webinar management solution was implemented without any additional setup or configuration required, so the Act-On tools worked seamlessly with Progressive's WebEx EventCenter account.

"We really wanted to look at the webcast series in a more integrated fashion, across the different stages of engagement," Booyens said. "We wanted to see the ongoing behavior of our agents, from the initial response to a webinar invitation through the follow up. Prior to implementing Act-On we really had no analytics and our processes were not repetitive or automated. The Act-On solution has allowed us to schedule a larger volume of web events, identify who has registered, and send automated reminders or last chance messages."

### THE BENEFITS

After starting out with WebEx in June 2008, Booyens said the addition of the Act-On solution has enabled Progressive to expand its frequency of events from 9 events over the course of 12 months to hosting 9 separate events on a single day in 2009. "Act-On has helped our effectiveness and efficiency a great deal and saved probably hundreds hours of work," he said.

In addition to improving efficiency, Booyens pointed to the added intelligence the Act-On solutions have provided as a significant payoff. "We now monitor and manage attendance and send relevant follow up," he said. "The Act-On tools have allowed us to build up a profile of our agents. Now we can see which types of events they have attended and then we can offer more targeted content around those topics."

Beyond the out of the box performance capabilities of Act-On and the easy integration with WebEx, Booyens said the company has also proven to be a valuable partner as Progressive delves deeper into automating its marketing.

"Given the expanded frequency of our webcasts, turnaround time has been a critical factor. Whenever we've needed customization or support, we have asked for something in the morning and by that afternoon it had been executed. In addition, the knowledge Act-On team brings to the table has been very valuable. Based on their work with other clients, they pointed us to creative ways to use the reporting and analyze the data we can now access," Booyens said.

### THE FUTURE

A little more than six months after integrating the Act-On solution with WebEx, Progressive is now capturing activity and history of their agents—including opens and clicks—and Booyens said there are plans to use that intelligence across other marketing channels. "With Act-On, we can do filtering based on different touch points, which is one of the reasons we went with their solution."

As Progressive expands the automation of previously manual processes, Booyens said the company is looking at the lead nurturing and lead scoring solutions Act-On provides. The company's lead nurturing solution allows companies to set up multi-step automated programs, that deliver a sequence of relevant and personalized communications (newsletters, case studies, white papers or invitations to events) at appropriate intervals. The solution allows companies like Progressive to keep messaging relevant at each step by basing the message content on a recipient's reactions to prior messages. For lead scoring, Act-On's integration with WebEx enables companies to assign numeric scores to factors like webinar registrations, webinar attendance, and number of webinars attended in addition to other online marketing channels like website visits and responses to paid search and banners ads.

Looking ahead, Booyens is planning to use that filtering capability to send recommendations to agents based on previous their previous behavior and webcast attendance. "Act-On allows you to send the right message to the right agent at the right time. This intelligence will enable us to follow up and be top of mind with that agent so they will recommend Progressive when the next customer comes in their door."