

Go-to-Market Transformation:

How Insurance Organizations Advance Digital Engagement



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Introduction

According to [Salesforce](#), 80% of clients say the experiences provided by a company are as important to them as its products and services. So how can you evolve your company's member enrollment strategy to meet and exceed your client's expectations?

After analyzing insurance companies across the industry, the top performers all share an important factor in common: they have shifted from siloed, offline sales and marketing tactics and reinvented their B2B go-to-market motions with the power of digital engagement.

Whether the objective is driving benefits and policy enrollment or engaging agents and brokers, industry leaders are developing integrated

digital engagement strategies that are successfully executed through a mix of highly interactive and intelligent experiences, like webinars, virtual events and content hubs.

Finally, with that foundation in place, you can map a plan for creating experiences that drive engagement, generate data-driven insights and deliver revenue growth, following the best practices of businesses that have made digital engagement a cornerstone of their sales and marketing success.

Read on to learn how you can get your journey started.



Pillars for digital maturity

After partnering with insurance leaders over the past decade, we've found that there are four key elements that separate experts from novices when it comes to their digital readiness and maturity:



Marketing strategy and digital engagement

Digital experiences are fully aligned to marketing strategy and outputs are used to understand audience insights.



Measurement and data

KPIs are set at the tactic and program level of digital experiences that include engagement and CTA conversions.



Acting on digital engagement data

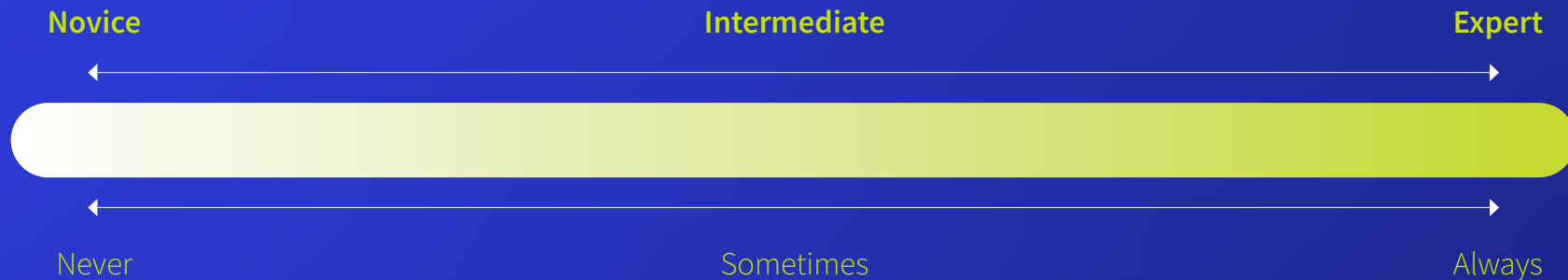
Digital engagement data is programmatically captured and a driver for sales and marketing plays.



Marketing technology integrations

Marketing technology is fully embraced and integrated into key sales and marketing systems.

Measuring for digital maturity



State of digital marketing maturity

In the “Beginner” stage, most audience engagement, including enrolling new members, is taking place within physical channels. This is followed by the “Novice” stage, where organizations begin experimenting with developing an integrated strategy rather than an ad hoc manner but are still lacking alignment with any defined marketing strategy and audience engagement.

Next is the “Intermediate” phase, in which organizations prioritize platform integration, enabling cross-channel campaign management. This phase also witnesses a heightened focus on technology, including the adoption of digital event-specific technology and a shift towards personalized marketing guided by customer insights.

At the peak of digital marketing maturity, is the “Expert” phase, where marketers excel in multi-channel execution across the customer journey, aligning efforts with business goals. They use personalization, automation and data-driven processes for highly personalized marketing strategies leveraging machine learning and data insights for optimization.

In this e-book, we shine a spotlight on an organization that has achieved the highest level of digital marketing maturity in the insurance industry by seamlessly integrating digital strategies into their member enrollment. Their story demonstrates the remarkable outcomes organizations can achieve when they fully embrace a digital-first approach.

2X

High-maturity organizations were more than twice as likely to have significantly exceeded their top business goal

Insurance: Member enrollment

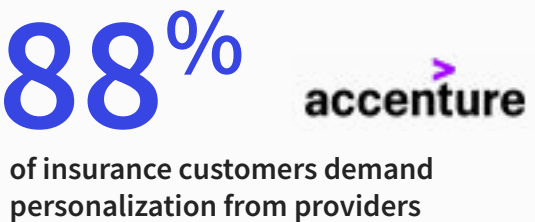
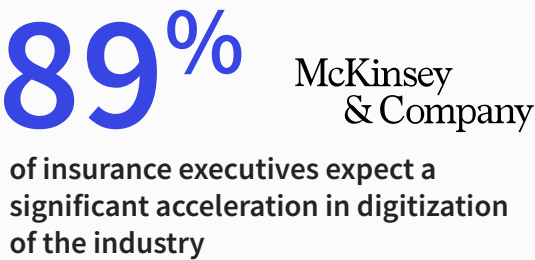
The primary objective of member enrollment strategies is to execute end-to-end protection policy programs that streamline market updates and coverage information. This strategic approach encompasses not only brokers and agents but also businesses and individuals. As the insurance industry becomes increasingly complex, organizations must find innovative ways to engage their target audience and facilitate enrollment processes.

That's why digital engagement is continuing to grow in importance as a key element for member enrollment success. In fact, [McKinsey](#) finds that nearly 90% of insurance executives expect a significant acceleration

of digitization, which will only gain momentum as nearly just as many insurance customers demand a more personalized online experience.

Most common experience types in member enrollment use cases:

- Member enrollment webinars
- Live broker and agent trainings
- Member meet-ups
- Member conferences
- Education portals
- Member promotions



Beginner	Novice	Intermediate	Expert
<ul style="list-style-type: none">• Member enrollment is driven by on-site events or participation in open enrollment days• No digital means to connect with members before they are enrolled	<ul style="list-style-type: none">• Member enrollment webinars are slides and audio only• Run on collaboration technology and data isn't systematically captured about attendees	<ul style="list-style-type: none">• Member enrollment digital events are run on webinar technologies• Registration and attendance data is captured for webinars• Basic engagement, like Q&A, are used during webinars	<ul style="list-style-type: none">• Member enrollment events have immersive brand components and are customized for the clients• Member enrollment webinars capture engagement data• Technology is integrated into CRM/MAP systems to automate running multiple meetings simultaneously and provide cancellation procedures• Webinar content has interactive engagement techniques and a follow-up strategy, and CTAs that are based on attendee behavior

Best practice spotlight: UnitedHealthcare

UnitedHealthcare Federal Programs provides health coverage to public sector groups nationwide, including government, labor and education sectors. They faced several challenges with their previous virtual program for broadcasting webinars including security concerns, blocked features, confusing steps, software glitches and insufficient data. Given that they broadcast webinars to federal agencies, the demand for secure and reliable virtual solutions was high.

Strategies implemented

- Increased audience engagement by leveraging tools such as chat, polls, surveys, and questions to choose relevant topics
- Saved time for field teams by shifting from in-person meetings to virtual webinars, while still building meaningful relationships
- Maintained brand consistency with templates for emails and consoles, showcasing their branding and logo

Results

- **75%** increase in attendance rate compared to previous years
- **3,000+** new leads in the last 180 days
- **2,000** unique attendees
- **2,000+** engagement hours
- Streamlined lead management through the ON24 CRM integration



UnitedHealthcare Federal Programs' adoption of ON24 significantly enhanced their member enrollment efforts, streamlining the process, improving engagement, and achieving impressive results in terms of lead generation and audience interaction.

Assessing your current digital transformation maturity

To gauge your digital engagement maturity, assess your organization across key dimensions, including strategy, organization, customer experience, technology and data.

Follow these steps:

- Conduct a digital maturity assessment
- Review the customer journey for digital enhancement opportunities
- Evaluate your technology stack
- Scrutinize your data strategy
- Identify gaps and create a roadmap for improvement



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Having a clear plan and path to maturing your digital strategy is critical when striving to drive revenue growth, innovation and differentiation.



Callan Young
Chief Marketing Officer, ON24

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41%

Almost half, 41%, of the companies who exceeded their business goals described their marketing strategy as “expert”



Preparing for future-proof growth

Conclusion

As we navigate the ever-evolving landscape of digital transformation, it's crucial that marketers embrace change and foster digital marketing maturity. These phases are tangible steps towards harnessing the full potential of digital events – from the “Beginner” phase marked by exploration and the “Novice” phase introducing virtual events, to the “Intermediate” stage, prioritizing engagement and integration to finally, the “Expert” maturity, where organizations excel in multi-channel execution, automation and personalized marketing.

Looking at the digital engagement strategies that influenced enrollment and retention, we can see what remarkable results are possible with a mature programmatic approach to digital engagement.

As marketers, we must prepare for future-proof growth by embracing digital marketing maturity. After all, the future belongs to those who dare to lead, adapt and innovate.

ON24

