Association Member Benefits Advisors (AMBA)
Improving Direct Marketing efficiency with Automation

Automation Impact

- ETL processes resulting in turn around time of Load process in few hours versus greater than 3 days!

- More than 95% of Leads automatically loaded as STP in seconds!

- Complete management transparency in Load process

- Automated Lead Name and Address identification and matching

- Strong Data Architecture and Analytics foundation for future

The Marketing department at AMBA embarked on a goal to enhance efficiency of their Load process by at least 50%. With a new and streamlined Extract, Transformation, and Load (ETL) process into the Data Mart, AMBA was able to populate, on an average, more than 95% of its leads and addresses in less than 20 seconds. This resulted in estimated cost savings of 50x over 5 years!

ABOUT AMBA

In 2001, David and Jerry Morgan founded Association Member Benefits Advisors (AMBA) to make benefits available for all association clients in the United States, including retired teachers and state employees. In 2017, Genstar invested in AMBA so that they, and their clients, could rise to a new level of success.

Working together with their associations, AMBA provides various benefits to its members including Long Term Care Policy, Medicare Supplement Plans, Dental & Vision Plans, Final Expense Whole Life Insurance Policy, Tax Deferred Annuity, Accident Expense Insurance Policy, Cancer/Heart/Stroke Policy, Air & Ground Ambulance Transportation Service, and American Hearing Benefits (AHB).

CHALLENGES

AMBA gets Leads information from 40 feeds across 112 data sources from more than 30 associations. Ability to handle the data loads in different data formats arriving at different frequencies involved mostly manual processes, along with some combination of SQL Scripts, MS Excel, MS Access, and Bulk Mailer Software. Name identification and Matching were manual in nature, without much adherence to data quality checks.

Top 10 associations accounted for more than 90% of business, but management had no visibility on completion of the Loads. Hence, it became difficult to plan outbound marketing campaigns for their members without much certainty. To make the matters worse, overloading of tasks due to Ad hoc requests coupled with availability of personnel, contributed to a huge backlog of feeds, some of which never got handled.

DATA AND AUTOMATION IMPACT

After several years of managing their Leads intake processes, AMBA engaged Analytics Advisory Group (AAG) to improve the speed and accuracy of population of their Lead's name and addresses for direct marketing.

The journey started with assessing AMBA's "Current State" of Data and Analytics. An Automation strategy was laid out, resulting in the realization that the feeds could be split into 2 parts viz.

a) Straight Through Processing (STP) for names and addresses of people that could be standardized through automated SQL scripts, and

b)   Manual exception handling

This, along with reduction of back and forth data movement between XLS, Access, and SQL Server resulted in freeing up existing resource time to do more valuable work, and streamlining the ETL process.

BENEFITS & BUSINESS VALUE DELIVERED

AMBA and AAG partnered together to accomplish:

- **Faster Customer Acquisition** – Quick STP processing with no breaks or restarts due to distractions or other priorities!

- **Well defined Governance & Organization Structure** - Analytics Architecture, Processes, Scripts, and well-defined roles have enabled right governance structure for success

- **Better predictability** – Better Planning for future feeds and appends resulting from increased transparency into Load process

- **Maintaining History** – Improved Association interaction communicating data changes over time

- **Accurate Mailings** – Less disgruntled members by reducing human errors in name identification with exact and fuzzy matching

- **Reduced Loss of Sales to Competition** – Monthly mailing to Prospects enabled, Elimination of backlogs of feeds, enhanced documentation, reduced learning curve

- **Strong Foundation for future** – Additional Associations and feeds could be automated lot faster now due to automation

"AAG team have been an exceptional partner in contributing to our success and providing real business value"

– CEO

"I didn't think we could automate the name standardization process to the extent we did, before starting the project! I am a believer"

– Data Specialist Supervisor