



Case Study

**Improving  
Digital ROI And  
Customer  
Experience For  
A Leading  
Financial  
Services Client**



## The Client

A renowned Singapore based global financial service company who are helping customers with a wide gamut of insurance policy services for over 85 years. With decades of experience and utmost commitment to their customers, they are now the market leaders in protection, savings, and investment-linked plans and accumulated over \$22 billion funds under their management.

**85**  
Years

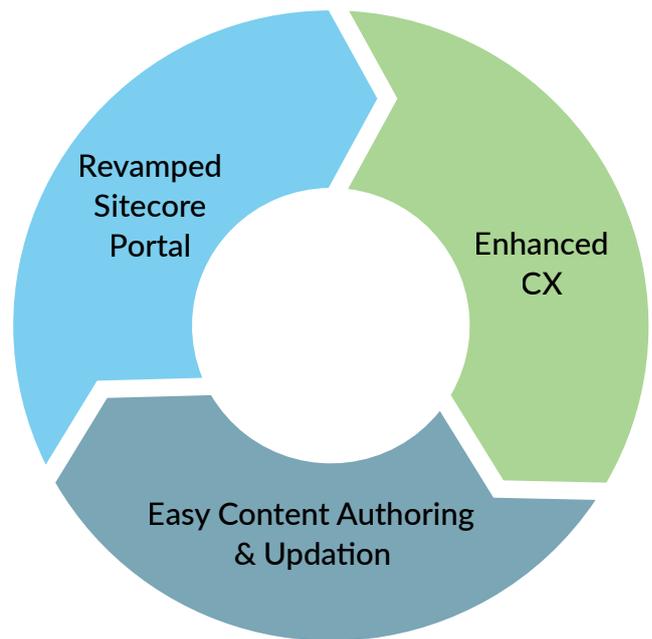
**\$ Billion  
Dollar  
Funds**

# The New User Experience They Envisioned For Their Customers

Making businesses digitally strong footed and providing excellent customer experience (CX) is what any futuristic organization would thrive for and the client is no exception.

They approached Ameex to help them resolve the following critical challenges.

- Providing a new and improved customer-centric digital platform with more focus on enhancing customer experience and engagement.
- The ability to personalize customers journey and increase customer registration for their insurance products.
- A new central repository for all their product information.
- To keep the information consistent and up to date across their various country-specific websites.



Thus, the revamped CMS application needs to deliver the following CX goals:



Increased customer satisfaction and loyalty.



Improved conversion rate



Meet business goals yet reduce the operational costs for technical support and resolution services.

# Reasons Their Current Platform Failed To Provide Great User Experience:



## **Outdated Design**

The design adds an all-important aesthetic value for a website. The outdated design of the site made it slow and difficult for customers to find relevant information quickly. This highly affected the customer experience leading to low customer satisfaction and conversion rates.

## **Poor Management Experience**

Poor content management experience made marketers depend on IT technical staff for content authoring and publishing. This not only became frustrating each time but also incurred additional developer costs to the client.

## **Low Engagement Rate**

Since the website did not leverage Sitecore's personalization features and analytics, there was no way to segment or differentiate the casual visitors from loyal customers. This paved way for "generic" customer experience to all users. As we all know that humans have less attention span than a goldfish, without engaging and personalized content the site suffered from low engagement rates.

## **Complex Multi-site Management**

The client's country-specific sites were hosted under multiple instances of Sitecore. This made it difficult to maintain consistent and updated information across all the sites simultaneously.

## **Complicated Lead Tracking**

Lead tracking and analysis became complicated without automated data extraction from the website and also the pushing of lead data from Sitecore to Salesforce CRM for the client's sales-related analysis.

## **Lack of Insights on High Bounce Rate Pages**

The website lacked the features to track the high bounce rate pages or top-performing pages, so that marketers can understand the cause and bring in the necessary changes for improvement.

## **Absence of Conversion Funnels**

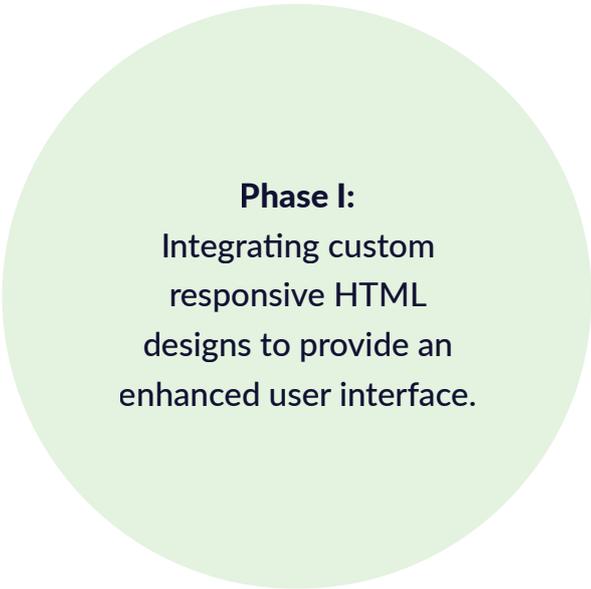
The client was not able to find how many users are dropping off before they reach the lead form. Despite seeing large incoming traffic, they only had a relatively lower rate of users converting and completing their business goals.

# Ameex's Agile, Goal-Oriented Approach

Throughout the journey, Ameex Team worked closely with the Client's Marketing and IT teams giving the best mix of consultative guidance and hands-on experience in implementing the updated website.

Our team recognized that personalization capabilities would be critical for the client at the initial launch and in their future.

In order to deliver personalization capabilities and improved experience, the site was completely revamped in two phases –



**Phase I:**  
Integrating custom responsive HTML designs to provide an enhanced user interface.



**Phase II:**  
Sitecore's previously unused powerful personalization capabilities and features are leveraged completely and addressed all the client's needs.

- The site was thoroughly revamped with best-in-class IA (Information Architecture) and contextual context rendering to provide rich, user-friendly content editing and publishing experience.
- Using Sitecore XP, time-sensitive content was made easier to publish.
- The SOLR (Searching On Lucene w/Replication) feature was recommended and implemented for faster search information on the site.
- The client was also provided with training on creating goals such as requesting for a quote, visiting a particular page, etc. to measure visitor engagement.
- The lead tracking process was simplified by capturing visitor journey at the site and page level which was then pushed to Salesforce CRM for offline sales processing and lead follow up.



- Using Ameex's Form Migration Tool, the outdated WFFM forms (used until Sitecore 8) were automatically migrated to the new Sitecore 9, which eventually saved a lot of time and effort for the client.
- Apart from personalization capabilities, the team also made several recommendations and implemented other features to enhance the customer experience.
- Throughout the process, Sitecore Helix Guidelines were followed to maintain consistency across the site and allowed marketers to add content within a logical and familiar site structure.
- Ameex leveraged Sitecore Analytics features and empowered the client to visualize valuable and insightful reports on the high bounce rate pages and top-performing pages.
- Our team utilized the Path Analyzer features to create funnel reports in Sitecore which helped their marketing team to understand how many users were dropping off before they hit the actual lead form and provided the capability to correspondingly optimize their website to ensure more visitors complete their marketing objectives.

# How Ameex's Solution Pay-off?



## 50% savings on time and effort

First up, there was a 50% savings on time and effort due to the improved architecture changes.



## Content authoring and publishing

The content authoring and publishing experience became seamless and enabled their marketing team to publish and update the content without the dependency on IT staff.



## 40% increase in site visits

40% increase in site visits by the users with a significant reduction in the number of clicks required to find key services and product information.



## Automated form migration tool

A whopping 70% savings on time and effort with the use of Ameex's automated form migration tool.



## Sitecore XP 9.3

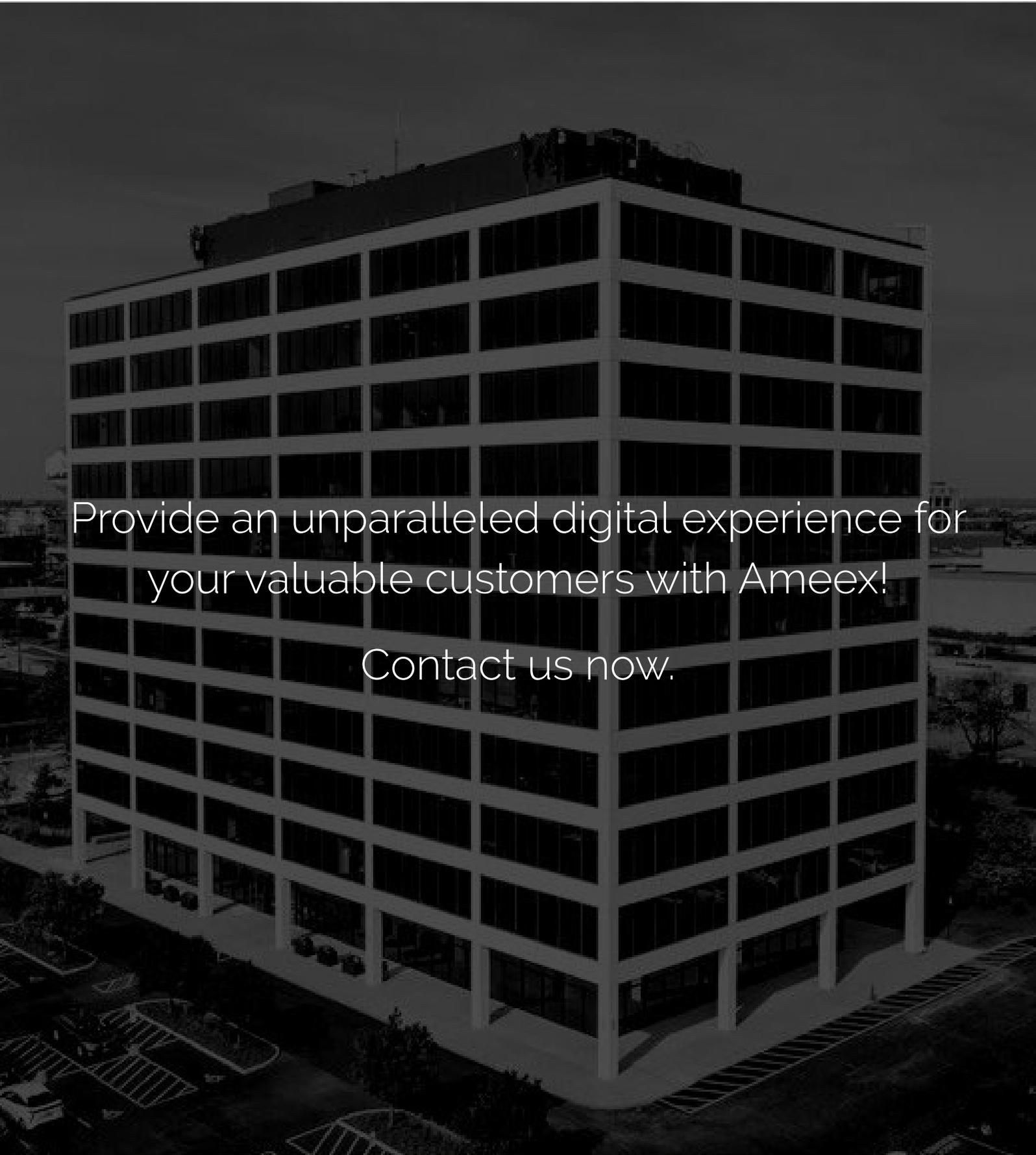
The website was upgraded to run smoothly in the latest version of Sitecore XP 9.3



## Well-structured information arch

They were also able to create and manage content in multi-sites with ease due to well-structured information architecture.

**All these improvements provided outstanding user experience for their customers, improved conversion rates, and created a huge edge over their competitors. Furthermore, they now have the ability to manage and update the site content effortlessly.**



Provide an unparalleled digital experience for  
your valuable customers with Ameex!

Contact us now.



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