

Case Study

Plus4 worked closely with Cumulo9 to maximise online presence and digital engagement for their Advisers.



Customer
Plus4

Industry
Insurance Services

Product
C9 Signature, C9 Campaign

Background

Plus4 is a national team of insurance advisers that specialise in personal and business insurance solutions. Working collaboratively to make sure they have the best outcome for their clients is an important focus for the group. Plus4 started working closely with Cumulo9 in 2014 to improve the communication delivery and compliance across the group.

The Challenges

Plus4's goal in early 2014 was to look at maximising their online presence for their Advisers. It was crucial for Plus4 to add value to their website and assist Advisers in helping them to achieve consistent branding and delivery across the company. Plus4 had observed that there were variations in email branding and document delivery among Advisers. Professional and consistent digital presence across all Advisers was important for Plus4 to grow their brand.

Plus4 also required a more efficient solution to email tracking, so that they could effortlessly follow up with their clients and be able to record when clients opened their emails or followed a link. As an insurance solutions provider, Plus4 members needed to be able to communicate effectively to be competitive whilst also remaining compliant within the ever changing regulatory environment.

Always looking to add value to their Adviser members, Plus4 also wanted to be able to provide a group solution for an engaging content pipeline. Taking advantage of the collective benefit of the group they wanted to be able to provide Advisers with regular content to communicate with their clients dynamically and consistently through email newsletters.



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While conducting an insurance review for a client, a savvy Plus4 advisor with a sharp eye saw something that grabbed her attention - resulting in an unexpected windfall for a Dunedin family.

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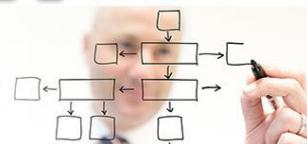
What is trauma insurance?

It's important to be aware of the cover you have and how it can be used. In our latest video, learn the ins and outs of trauma insurance.

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The Solution

- Cumulo9's C9 Signature provides Plus4 with version-controlled templates so that they can upload individual disclosure statements in order to be compliant. In addition, C9 Signature ensures that Plus4 now have seamlessly on-brand professional emails that remain uniform across their organisation.
- Plus4 also use C9 Signature's silent email tracking so they can now see when emails are opened, links are clicked, and pages are viewed.
- Cumulo9's C9 Signature offers bespoke rules to manage specific third-party software and plugins to accommodate Plus4 with any email rendering inconsistencies that can occur. C9 Signature also provides Plus4 with security as emails are delivered securely and reliably.
- Plus4 utilises the C9 Campaign product to distribute monthly newsletters to their clients through professionally designed templates. The regular newsletters also come complete with the full reporting available from C9 Campaign to ensure the ongoing enhancement of the client communications.
- Using C9 Campaign not only gives Plus4 confidence their newsletters are getting delivered, it also allows their Advisers to improve their marketing integration. Whether it is analysing results, segmenting their database for customised targeting, social media integration or the interactive reports that helps them to see who received, opened, clicked and shared their newsletters.

The Results

C9 Signature

- C9 Signature's silent tracking tool was the most attractive feature for the Plus4 advisers, it has allowed advisers to schedule follow up calls once clients have opened their email. This tactic has helped improve the retention and renewal of client business and further developed the Adviser/Client relationships.
- This tool also identifies when links are clicked such as their website or disclosure documents, this helps Plus4 follow up with important documents. Clients no longer need to take an extra step to visit their website or download disclosure documents or request one direct from the adviser. This has not only increased customer engagement, it has also resulted in greater compliance and is more convenient for both clients and advisers.
- Plus4 now have professional branding and can be confident in knowing that each email will be delivered consistently to all recipients.
- High levels of security and compliance with Cumulo9's products along with the Financial Markets Authority gives Plus4 Advisers a good level of comfort knowing that they are providing the best industry standards around compliance and auditability. This includes FMA agreement with C9 procedures providing the sufficient level of tracking to confirm delivery.

C9 Campaign

- Following the implementation of the regular client newsletters with C9 Campaign Plus4 have noticed an increase in their email open rate and have enjoyed an increase in their email deliverability. This has led to a significant value proposition for the Plus4 Advisers and helped with their ongoing client communication requirements.
- The C9 Campaign system provides ongoing and improved relevance and engagement with the Plus4 client base. Regular contact with their clients has improved and having the ability to prove this is important for compliance requirements. By using the "easy-build" template designs, Plus4 advisers can create compelling newsletters with rich content. C9 Campaign allows Plus4 to easily track the topics that are better received by their clients and customise their newsletters accordingly.

"Cumulo9 is delighted to be working with the Plus4 team. Our products and solutions are designed with security and compliance being top of mind. Of course the "read receipt" and "tracking" technologies are also key, but at the end of the day our products and solutions help our customers to increase their client engagement and sales in a cost effective manner." Chris Hogg, CEO, Cumulo9

"I find the C9 Signature tracking is very valuable in my office for a couple of reasons. Firstly it is great for sales, it means you know someone has read and received so you can follow up appropriately and timely. And most importantly, it is great for compliance, if necessary we are able to prove that the client has read something."

Mark Sheehan, Principal/Authorised Financial Adviser at Plus4 Financial Services