



nib transforms their  
employee and customer  
experience with  
Salesforce

CUSTOMER  
**nib Health Funds Limited**

LOCATION  
**Newcastle, Australia**

INDUSTRY  
**Healthcare/Insurance**



## Challenge

- To provide a more personalised level of service and improve customer retention rates
- To reduce operating costs and simplify workflow processes
- Accelerate campaign time to market and position their organisation to scale



## Solution

- Salesforce CRM, Salesforce Marketing Cloud and Datorama
- Consolidation of platforms and functions onto a single instance
- Unified Preference Centre to allow customers to self-serve and manage preferences



## Results

- Streamlined marketing workflow processes resulting in 30% cost savings
- Improved communication and 50-60% accelerated campaign time to market
- Enabled most successful loyalty campaign in-market to date, achieving highest loyalty program sales months



## nib transforms their employee and customer experience with Salesforce

nib is an Australian health care fund that provides health and medical insurance to over 1.6 million Australian and New Zealand residents. The organisation also provides health insurance to more than 190,000 international students and workers in Australia, and is the country's third largest travel insurer and global distributor of travel insurance.

"We recently engaged DXC for a Salesforce Marketing Cloud (SFMC) implementation and were delighted with the process and outcome."

— **Josh Griffiths**  
Group manager –  
Marketing Automation  
nib Health Funds Limited

### Challenge

In a highly competitive landscape and a weakening customer retention rate, nib knew they needed to find ways to improve their online customer experience and reduce their operating costs.

This was further emphasised in the wake of COVID-19, which saw a critical need for nib to provide emergency communications to their customers in a quick and effective manner. They also experienced a rise in customers wanting to access and amend their insurance policies online, meaning nib had to find new ways to empower them to self-serve and access affordable health services and information, in an efficient and personalised manner.

To remain competitive, nib also needed to find ways to reduce their operating costs, simplify their workflow processes,

accelerate their campaign time to market and position their organisation to scale.

### Solution

To achieve nib's objectives, DXC worked closely with nib's marketing team in a series of co-design workshops to learn and understand how the team used the systems and how they would like to operate moving forward.

Once clear on the requirements, DXC started by integrating nib's Salesforce CRM with Salesforce Marketing Cloud (SFMC) and configuring multiple components. With ease of communication an issue, DXC consolidated nib's platforms and functions onto a single instance of SFMC, which helped facilitate communications between their teams in Australia and New Zealand.



DXC and Salesforce enabled nib to orchestrate quickly using internal capabilities, becoming nimbler during the pandemic, and are now better positioned to scale for the future.

To improve their customer experience, DXC created a new Unified Preference Centre to help empower customers to self-serve and manage their preferences directly in Salesforce CRM. The portal consists of a range of highly secure landing pages created in SFMC using the secure hashing algorithm, SHA512. Furthermore, to enhance customer retention, an option for customers to pause communications from nib for a period of 60 days, rather than having to unsubscribe straight away was also created.

Using advanced personalisation scripts and dynamic content, DXC ensured all communications were heavily personalised to suit the audience and/or secondary brands that sit under the master nib brand across all emails, SMS and within the Unified Preference Centre.

To enable nib to configure communications quickly and easily via SMS, email and telephone, DXC migrated 15 automated user journeys into SFMC omnichannel. SMS communications were then integrated using the Short.io platform with SFMC and DXC also incorporated the nib brand guidelines and to enable personalisation of the links within SMS communications.

To provide contact centre agents with an easier way to contact members needing further support, a custom journey builder activity was created and integrated with nib's telephony platform, Genesys, and AWS Connect. This custom activity enabled nib to

easily set up journeys where customers from static or dynamic data extensions were added to the calling queue in the telephony platform. Marketers could determine members to contact and easily pass them onto the contact centre, all within Marketing Cloud's Journey Builder. This made it seamless and near real time for selected members to be called by contact centre agents and helped to increase nib's customer retention rates.

A custom email archiving solution was also implemented to ensure industry regulatory compliance and allow nib to archive emails sent to customers.

Finally, DXC implemented Datorama to help nib retrieve and interpret data coming from various mediums such as dynamic content, that had been tailored to specific audience groups for ad-hoc and journey sends. By having quick and easy access to detailed, real-time reports, nib was able to quickly identify areas for improvement and make the necessary enhancements.

## Results

This project lay the foundations for nib to achieve a truly omnichannel, member-focused engagement with next best actions and position their organisation to scale. The project enabled nib team members to easily access their member's data, create segments and manage their marketing campaigns themselves. In comparison to previous campaigns, nib now save on average 30% on their marketing campaign execution costs.

With the new campaign suite supported by the integration, nib has been able to influence a statistically significant difference in cover review prompts for their members. This includes a cover upgrade campaign that well exceeded the initial goal, ensuring members have sufficient product coverage for their health needs.

The new SFMC platform allowed nib to streamline marketing workflow processes, improve communication within the group and reduce their operating costs and campaign time to market. The Marketing Cloud integration has also supported nib to manage engagement more effectively with members, rolling out a re-engagement strategy to maintain higher than industry average open and click through rates.

In less than 12 months post launch, nib's marketing team have already experienced enhanced efficiency and on average have achieved 50-60% time savings. For instance, nib is now able to execute a campaign themselves in

2 weeks as opposed to the 4-6 weeks it used to take them, working with an external agency.

Now equipped to send out invitations themselves, nib have been able to connect thousands of their members with digital health tools to better manage their health.

The integration has also supported nib to 'talk to' new audiences with frequent, regular campaigns — including their corporate advisers, clients and brokers.

The innovative reporting tools, including Datorama, capture data in real time and offer actionable insights which are used to quickly identify opportunities and further improve retention rates.

The custom telephony activity allows marketers to create member segments and seamlessly pass the details to the contact centre using Journey Builder for them to be contacted. This saves both time and effort and provides a better experience for marketers, contact centre agents and members alike.

DXC and Salesforce enabled nib to orchestrate quickly using internal capabilities, becoming nimbler during the pandemic and are now better positioned to scale for the future.

Learn more at  
[dxc.com/au/practices/salesforce](https://dxc.com/au/practices/salesforce)

Get the insights that matter.

[dxc.com/optin](https://dxc.com/optin)



#### About DXC Technology

DXC Technology (NYSE: DXC) helps global companies run their mission critical systems and operations while modernizing IT, optimizing data architectures, and ensuring security and scalability across public, private and hybrid clouds. The world's largest companies and public sector organizations trust DXC to deploy services across the Enterprise Technology Stack to drive new levels of performance, competitiveness, and customer experience. Learn more about how we deliver excellence for our customers and colleagues at [DXC.com](https://dxc.com).