

A MODERNIZED APPROACH
TO SALES & MARKETING IN

Insurance

A guide for revenue teams to create and
convert more pipeline in Insurance

Misaligned Sales and Marketing Efforts

Sales and Marketing teams at most insurance companies are working towards the same goals but lack the data and tools to properly work together to **focus on growing relationships with the right companies.**

Marketing teams run broad-based campaigns targeting companies with firmographic (industry, revenue, etc.) data, whereas sales teams and brokers often focus on predefined account lists set at the beginning of the year.

Both teams are missing out on a huge opportunity to focus both sales and marketing teams on the companies that are actively researching their solutions, but not talking to sales or de-anonymizing themselves through marketing channels (we call this anonymous activity the “dark funnel”).

That’s where **6sense Revenue AI** comes in. In this guide, we’ll show you 3 simple use cases for both marketing and sales, and exactly how they’d work for your company.

The Traditional Approach No Longer Works

70%

of the client's journey is done anonymously

3%

of website visitors fill out forms

10%

of your targets are in-market to buy

84%

of deals are won by the first firm a client contacts

UNKNOWN DEMAND

Missing Out on **Opportunities**

NOT SUSTAINABLE

Team **Burnout**



POOR TIMING

Falling **Conversation Rates**

LIMITED RESOURCES

Creating **Inefficiency**

Focus Resources on Clients that are Ready to Engage



- Total In-market Clients
- Known In-market Clients

If we just knew **when clients were *In-market* (looking for solutions)**, sales and marketing would be so much easier.

When clients are
in-market

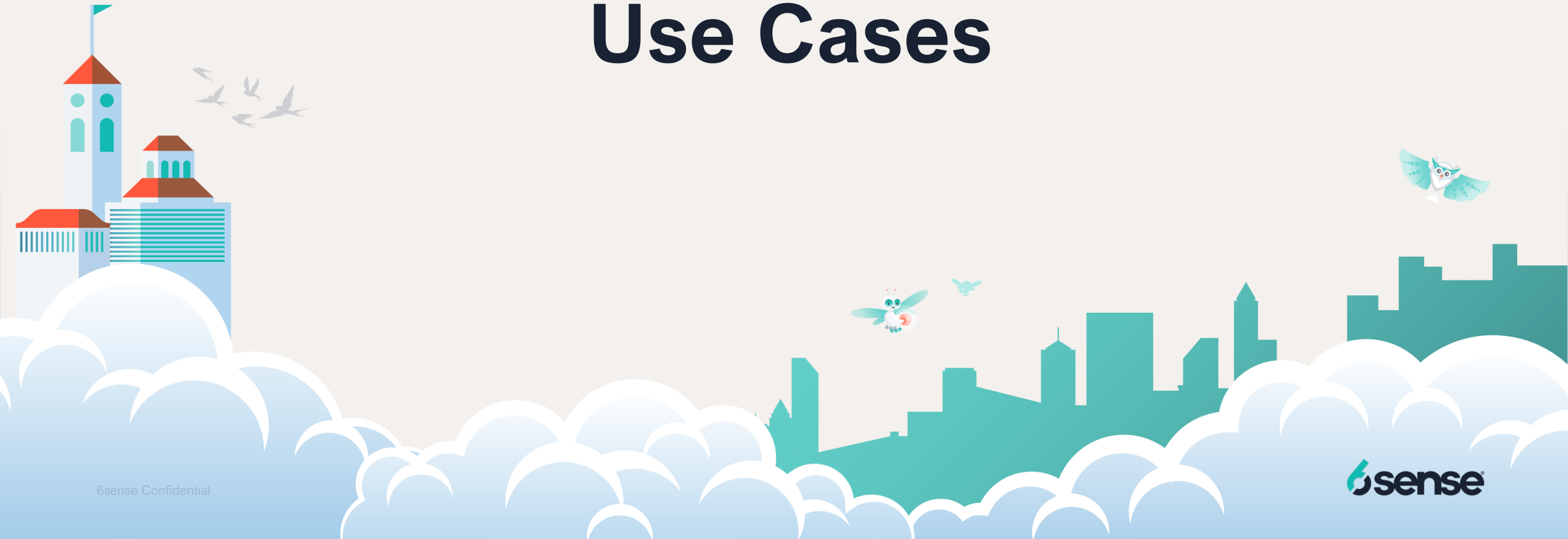
Which products
they're interested in

Who to contact

How to contact them

6sense pulls together 3rd party internet research (what keywords or topics people are researching on the internet) with data that you already own (website, CRM), and matches it at the company level, to guide you on...

Use Cases



Top 6 Plays for Insurance

MARKETING

Play #1

Measure and improve marketing efficiency by targeting the right audience with the right insurance products

Play #2

Support channel partners with lead gen by providing actionable insights

Play #3

Uncover prospects researching your competition and take action

SALES

Play #1

Prioritize accounts in business lines with a broad target market

Play #2

Protect and grow key accounts

Play #3

Harness market intelligence to drive cross sales

Play #1: Measure and improve marketing efficiency by targeting the right audience with the right insurance products

EXAMPLE



Problem: Your company is launching a new employee perk for supporting mental health in the workplace and wants to generate demand through a paid ad campaign.



Impact: In the past, marketing campaigns have been broad and generalized, making it difficult and inefficient to get the right message in front of employers seeking mental health solutions for their employees.



Solution: With 6sense, you can build an audience list that consists of companies and intermediaries researching employee perks, and more specifically, employee mental health benefits.



Result: This increases your marketing efficiency by only targeting companies that are likely to be in the market for your new offering.

Add Filters

CRM

- Salesforce: Account
- Salesforce: Contact
- Salesforce: Lead

Map

- Marketo: Lead

6sense AI

- 6QA: Current Status

Take Action

- View Performance Report
- View Connections (NaN)
- Sync to Google Ads
- Sync to LinkedIn
- Sync to Facebook
- Create Orchestration
- Create Alerts
- Publish Segment

Advanced Targeting

▼ **Persona**

I want to target

Chief Investment Officers

or

Investment Analysts

or

Investment Committee

Estimated Daily Spend
\$1,500 - \$2,000

Segment	Visitors	Keywords	Activities	Latest Activity	Latest Impression
Small Business 1 United States	95	56	769	September 27	September 27
Small Business 2 United States	130	43	870	September 23	September 23
Small Business 3 United States	80	24	539	September 20	September 20

Play #2: Support channel partners with lead gen by providing actionable insights

EXAMPLE



Problem: You're a marketer at a large insurance company tasked with increasing revenue from channel partners.



Impact: In a competitive market, it's challenging to differentiate your offering so that channel partners choose your products off the shelf when creating employee benefit packages for their customers.



Solution: With intent data at your fingertips, you identify a large company that is actively researching group life plans and share it with a channel partner you're trying to expand your relationship with.



Result: This demonstrates that your company provides value beyond insurance offerings, making them more likely to select your products when recommending benefit packages.

Top Generic Keywords

PREMIUMS

TOP CARRIERS

MENTAL HEALTH

WELLNESS

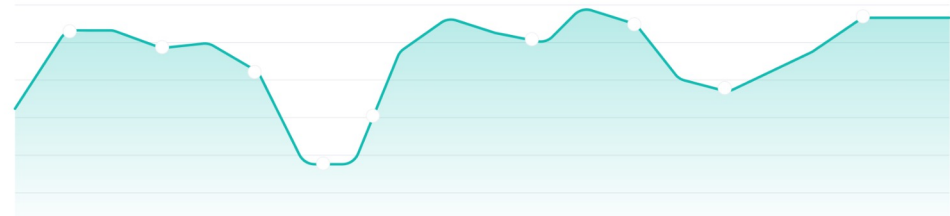
BROKER

MERCER

Top Keyword Groups

Commercial Auto	45	<div style="width: 45%;"></div>
Workplace Health	42	<div style="width: 42%;"></div>
Life Insurance Benefits	30	<div style="width: 30%;"></div>
Wellness Benefits	25	<div style="width: 25%;"></div>

ACCOUNTS (59) PREDICTIVE ANALYTICS BEHAVIORAL ANALYTICS PROFILE ANALYTICS



Branded Keywords 25 Generic Keywords 208 Research Activities 7,488 Accounts 61

Play #3: Uncover prospects researching your competition and take action

EXAMPLE



Problem: You work at a company that sells auto insurance products through insurance brokers.



Impact: A large brokerage is actively researching a competitor's products and you're left out of their search.



Solution: Now, you can add the brokerage to a campaign with educational content about your commercial auto experience and specific product offerings.



Result: Marketing dollars are being spent with an in-market brokerage that is interested in your products and more likely to convert.

Top Keyword Groups

Commercial Auto	45	<div style="width: 45%;"></div>
Workplace Health	42	<div style="width: 42%;"></div>
Life Insurance Benefits	30	<div style="width: 30%;"></div>
Wellness Benefits	25	<div style="width: 25%;"></div>



Top Branded Keywords

CARRIER A ACME CARRIER INSURANCE A
INSURANCE B FINTECH A

Play #1: Prioritize accounts in business lines with a broad target market

EXAMPLE



Problem: You're an agent whose company specializes in SMB insurance.



Impact: You need to ensure you're focusing your efforts where it counts.



Solution: With 6sense, you have access to a Priority Dashboard that's embedded within your CRM.



Result: Now you can prioritize your outreach to focus on companies that are more likely to buy based on their recent activity, like website visits, researched keywords, and more.

The screenshot shows the 6sense Account Detail Page for Visa, Inc. The page is embedded within a CRM interface. The account information includes:

- Company:** Visa, Inc. (Foster City, California, United States)
- Account Status:** 6QA, Warm Account, Maintain Engagement
- Contact Info:** Corporate Phone: +1 650-432-3200; Website: visa.com
- Address:** 900 Metro Center Boulevard,...
- Company Type:** Public
- NAIC/ SIC:** 52311/6799
- Industry:** Financial Services (Payments)
- Product & Services:** Payment Solutions (+9)
- Links:** LinkedIn, Facebook, Twitter, YouTube
- Opportunities:** 14 Past
- Matched Record:** Visa
- About:** Visa, Inc. provides payment solutions, d... View More

The 'Intent' tab is selected, showing two keyword sections:

- Branded Keywords (6 Items):** linkedin sales navigator (7), Account Score (3), Competitor Name (2), 6sense (2), ABM (2), Competitor Name (1)
- Generic Keywords (101 Items):** predictive analytics (79), marketing performance (54), sales AI (41), technology intelligence (32), sell ai (31), market intelligence (30), sales prediction (27), sales pipeline (25), customer data management (25), account data (19), ai powered sales (16), account targeting (15)

Account details page, embedded within your CRM, display relevant account information, like intent keywords researched and which web pages are being visited, where your sellers already work.

Play #2: Protect and grow key accounts

EXAMPLE



Problem: A national account you're targeting has been researching health insurance providers over the past couple weeks and may finally be looking to switch their group health plan for employees.



Impact: You know large companies don't switch their health insurance plans often, so timing is crucial.



Solution: Leveraging these signals, you reach out to your contact on the HR team with hyper-personalized content making the case to switch to one of your plans.



Result: You're able to add a new business opportunity to your pipeline that wouldn't have been on your radar without 6sense.

The screenshot displays the 6sense 'Daily Top Accounts' dashboard. At the top, it shows 'Top Accounts today: 13' and a link to view all hot accounts on Salesforce dashboards. Below this, there are four key metrics: 'NEW HOT ACCOUNTS' (0), 'RECENT WEB VISITS' (10), 'RECENT INTENT ACTIVITIES' (3), and 'RECENT CONTACT ENGAGEMENT' (0). A section for 'Small Business' (www.smallbusiness.com) is highlighted, showing a '6QA' score, a 'Decision' buying stage, 'Moderate' profile fit, and 'High' account reach. It lists 5 web visits (0 known, 5 anonymous) with specific URLs and 16 keywords researched by 25 anonymous users, including 'ABM (7)', 'Account Score (1)', 'cdp (77)', 'account data (14)', and 'data cleansing (4)'. At the bottom, there are two buttons: 'View on 6sense' (for 6sense users) and 'View on Sales Intelligence' (for Salesforce users).

Play #3: Harness market intelligence to drive cross sales

EXAMPLE



Problem: Last year, you sold group dental insurance directly to a large company.



Impact: At the time, they were content with their current vision insurance provider.



Solution: With real-time email alerts, you're notified that now they're searching for new vision providers.



Result: You schedule a check-in with their employee benefits team and add a cross-sell opportunity to the pipeline.

Top Keyword Groups

Commodity Strategies	45	<div style="width: 45%;"></div>
Lower Fees	42	<div style="width: 42%;"></div>
Passive Strategies	30	<div style="width: 30%;"></div>
Active Strategies	25	<div style="width: 25%;"></div>
Emerging Markets	19	<div style="width: 19%;"></div>

Top Branded Keywords

STANDARD INVESTMENTS PORTFOLIO MANAGERS

WHITESTONE ACME CAPITAL

Key Contacts for Sales Engagement



Most important unreachable contact

Josephine James
Financial Advisor

[Add to Email Cadence](#)

[View Talking Points](#)
[View Email & Phone](#)
[View Recommendations](#)



Engaged, but not recently reached

David Lundberg
Chief Investment Officer

[Add to Email Cadence](#)

[View Talking Points](#)
[View Email & Phone](#)
[View Recommendations](#)



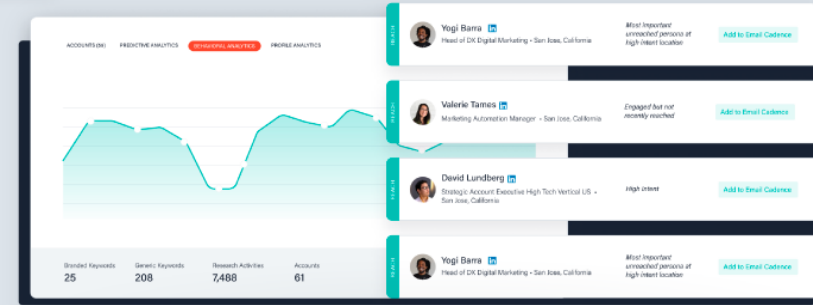
High intent, no sales engagement

Francesca Bates
Head of Insurance Investments

[Add to Email Cadence](#)

[View Talking Points](#)
[View Email & Phone](#)
[View Recommendations](#)

ACTIVATION LAYER



Revenue AI™ for Marketing

Revenue AI™ for Sales

INTELLIGENCE LAYER



WHO

Anonymous Buyer Intelligence



WHEN

Predictive Intelligence



Data Cleansing & Connecting



HOW

Recommendation Intelligence



WHAT

Generative Intelligence

DATA LAYER



Web Activity



Company



Intent



People



Pre-Intent



CRM



MAP

Join the suite of insurance providers and other financial services firms using 6sense to drive quality premium flows.

MORNINGSTAR®

SEI New ways.
New answers.®

VOUCH

experian™

ENVESTNET®

HDVI
HIGH DEFINITION VEHICLE INSURANCE

Continue your learnings here.

+39%
More Opportunities

+13%
More Wins

+45%
Larger Deals

-38%
Shorter Cycles

6sense®