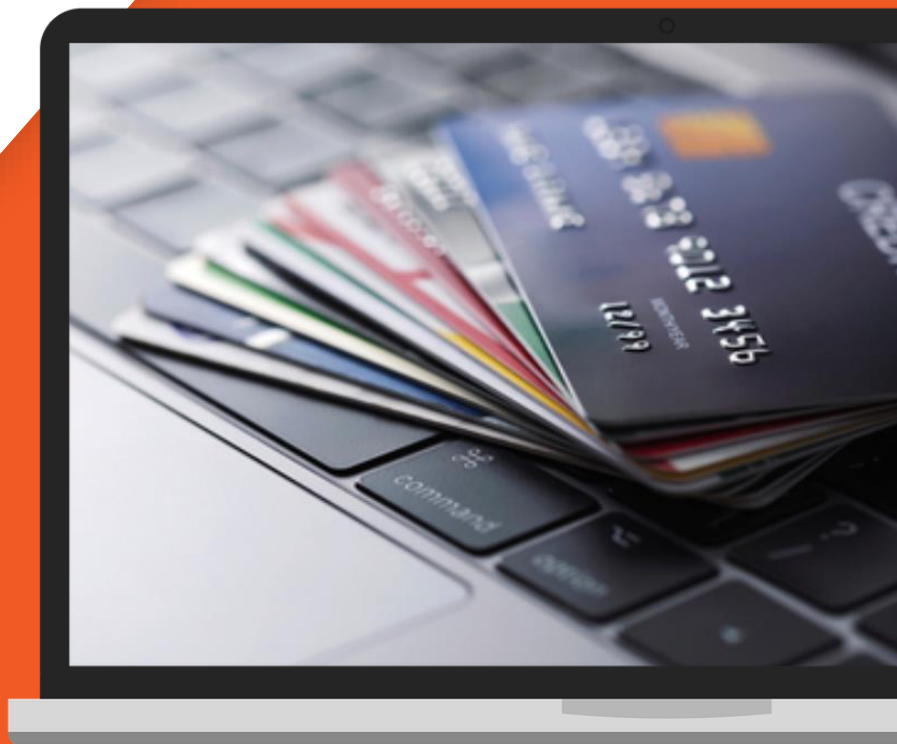




Marketing Attribution & Incentive Campaign:

A Success Story in Broker Engagement
And Lead Generation

CASE STUDY



The Client

UQUAL is an organization dedicated to helping people improve their credit, DTI, savings and overall financial wellness, opening the door to a more promising financial future.

With 17 years of experience, UQUAL's experts develop customized loan readiness strategies aligned with each client's unique financial situation. With UQUAL's help, clients can reshape their financial stories and take control of their lives.

The Problem

In the high-stakes arena of brokerage, it's essential to engage new brokers and awaken the unengaged ones strategically. UQUAL, a powerhouse in the industry, was looking to spark broker interest via a weekly incentive campaign.

At MAC, we knew that sporadically handing out incentives wouldn't cut it. We needed to incentivize the **right brokers**—who would be most inclined to generate leads and ultimately boost UQUAL's business.

The first obstacle was to engage new brokers while also reigniting the interest of those who had become inactive. Precision was key—each lead generated had to be accurately traced back to the marketing efforts that sparked it. This called for a deep knowledge of the diverse broker segments and their various interactions with UQUAL's online services.

But of course, there was more! UQUAL had a strategic plan to boost broker engagement—specifically, they wanted to reengage those who had become inactive in lead generation.

Their goal was to launch a campaign powerful enough to spur brokers into action and increase interactions and lead submissions. This was a huge undertaking because UQUAL had never been able to target this particular segment effectively before.

The Solution

Our approach to tackling UQUAL's challenges was multifaceted. We introduced a comprehensive strategy that included two key components: Broker Segmentation and a Weekly Incentive Campaign.

Broker Segmentation

The first step in our approach was to segment brokers into distinct groups:

- Net new brokers
- Existing active brokers
- Dormant brokers.

This allowed us to tailor our strategies to meet the unique needs and behaviors of each segment. To track the effectiveness of our efforts, we developed a system that could trace each interaction and attribute leads back to specific marketing initiatives.

This system took into account varying time frames and interaction criteria for each group, ensuring that we could accurately gauge the impact of our marketing efforts on each segment.

Weekly Incentive Campaign

The next part of our strategy involved launching a Weekly Incentive Campaign. We introduced a points-based system where brokers could earn points for engaging with UQUAL's digital content.

At the end of each week, the broker with the most points won a prize. This added a competitive element to their interactions and served as a motivating factor for increased engagement. To facilitate this, we developed a broker dashboard that allowed brokers to track their points and activities. At the same time, it incentivized actions such as attending webinars, watching videos, and submitting leads.

The combination of these two strategies allowed us to effectively engage different broker segments and accurately attribute generated leads to our strategic efforts. By crafting a solution that was tailored to address the behaviors and motivations of various broker segments, we ensured engagement and accurate lead attribution. This innovative approach proved to be a game-changer for UQUAL, revolutionizing their broker engagement and lead generation processes.

The Outcome

The marketing attribution strategy resulted in a noteworthy increase in broker engagement, with **955 new brokers** joining the organization. The strategy also led to the successful reengagement of existing brokers, with numerous leads directly attributed to our targeted marketing efforts from both these new and rejuvenated brokers.

Our Weekly Incentive Campaign generated positive outcomes, with an enrollment of **27,982 brokers** and a noticeable increase in broker engagement.

It wasn't just about the numbers, either! The campaign sparked a competitive spirit among the brokers, creating an enjoyable yet productive atmosphere that fostered increased interactions. This uptick in broker engagement directly translated into a generation of **335 valuable leads**.

By employing a dual-pronged approach that combined segmentation and weekly incentives, we created tangible results for UQUAL.

Now, that's what we call a success story!



Crush Your Marketing Goals with MAC!

Don't stick to outdated strategies that no longer deliver the results you want. Connect with our seasoned experts today —we'll help you craft an innovative marketing campaign that takes your lead generation to new heights!

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