



Personalization and Prioritization for the CRM Call Center

The Challenges

- Greater personalization of customer communications
- Increased business impact of call center
- Accurate measurement of campaign performance

The Company

easyMarkets is a pioneer online market maker, established in 2003. The company provides traders with access to global markets, via a technologically-advanced yet user-friendly platform. Licensed by both CySEC and ASIC, easyMarkets enjoys the reputation of a reliable and transparent market leader. The company's trading platform enables traders to trade financial instruments in the FX, CFD and vanilla options markets.

The Benefits

- Automated personalized customer marketing based on lifecycle-stage segmentation
- Significant improvements in spend and churn levels
- Scientific campaign uplift measurements and optimization

The Challenge

easyMarkets' CRM management team sought a system that would provide them with the ability to segment their trader base in an intelligent and scalable way. They saw this as an important basis for better communicating with their traders via more relevant and personalized marketing messages.

A primary goal of deploying such a system was to increase the business impact of the company's sizeable call center operation. The company wanted to be able to automatically prioritize which customers the call center contacted, with which offers, in order to maximize customer engagement, spend and retention.

The company's management also wanted to implement a systematic approach to measuring the financial lift of every campaign and optimizing the marketing plan over time.



The Optimove Solution

easyMarkets selected Optimove and worked with Optimove's CRM analysts to build a custom trader model based on lifecycle-stage segmentation. By focusing on lifecycle stages, and the numerous granular sub-segments identified within each stage, the marketers were able to systematically build out a personalized marketing plan addressing dozens of distinct customer personas.

The CRM team focused on increasing customer engagement and spend, by identifying the best cross-sell/up-sell opportunities for each customer persona. To ensure the greatest financial impact, call lists are prioritized

“Optimove provided us with a powerful and automated way to significantly increase the retention and lifetime value of our traders. The professional team at Optimove assisted us every step of the way, helping us get the most out of their platform.”

— Nima Siar, Director of Client Relations

to favor the highest-value customers. The resulting persona-based marketing plan is used to drive call center automation, by automatically delivering to the call center the lists of customers to call, on a daily basis, along with the specific promotions each customer should receive.

Optimove generates the call center action lists based on a scientific test vs. control methodology, allowing accurate measurement of the uplift generated by every campaign. By comparing results and tweaking the campaign mix, easyMarkets’ marketers were able to dramatically increase trader deposit amounts while reducing churn.

Benefits by the Numbers

- 10% monthly uplift in campaign deposits
- 36 distinct customer persona groups treated monthly
- 99% of campaigns are automated campaigns

