



New York Life Investment Management

Increased sales productivity using content that finds their sellers

Company profile:

HQ: New York City, NY
2,100 employees

AUM: \$538B

Overview: New York Life Investment Management, is a premier investment management firm serving a variety of sectors—retail, institutional, and more.

36%

Reduction in printing
and self-mailing
content costs

Sixty marketing managers and 400+ sales reps in New York Life's annuity and investment groups were wasting time manually updating materials for their mix of B2B and B2C clients across the globe. During their four year digital transformation journey, New York Life realized they needed a better system to automate and personalize pitch books and streamline collaboration.

Rolling out Seismic across the annuity and investment groups, sales has access to build customized pitch books using LiveDocs® technology directly in Salesforce. They can also see, personalize, and send Predictive Content based on their customer's information in Salesforce through their Eloqua integration. Since implementing Seismic, New York Life has seen a 36% reduction in print and self-mailing content costs across all business groups and vastly improved how sellers build relationships with customers using personalized materials.