



Increases sales productivity using content that finds their sellers

Located in New York, NY with 2,100+ employees, New York Life Investment Management, is a premier investment management firm serving a variety of sectors—retail, institutional, and more.

The Challenge

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.

The Solution

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.

The Impact

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.



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