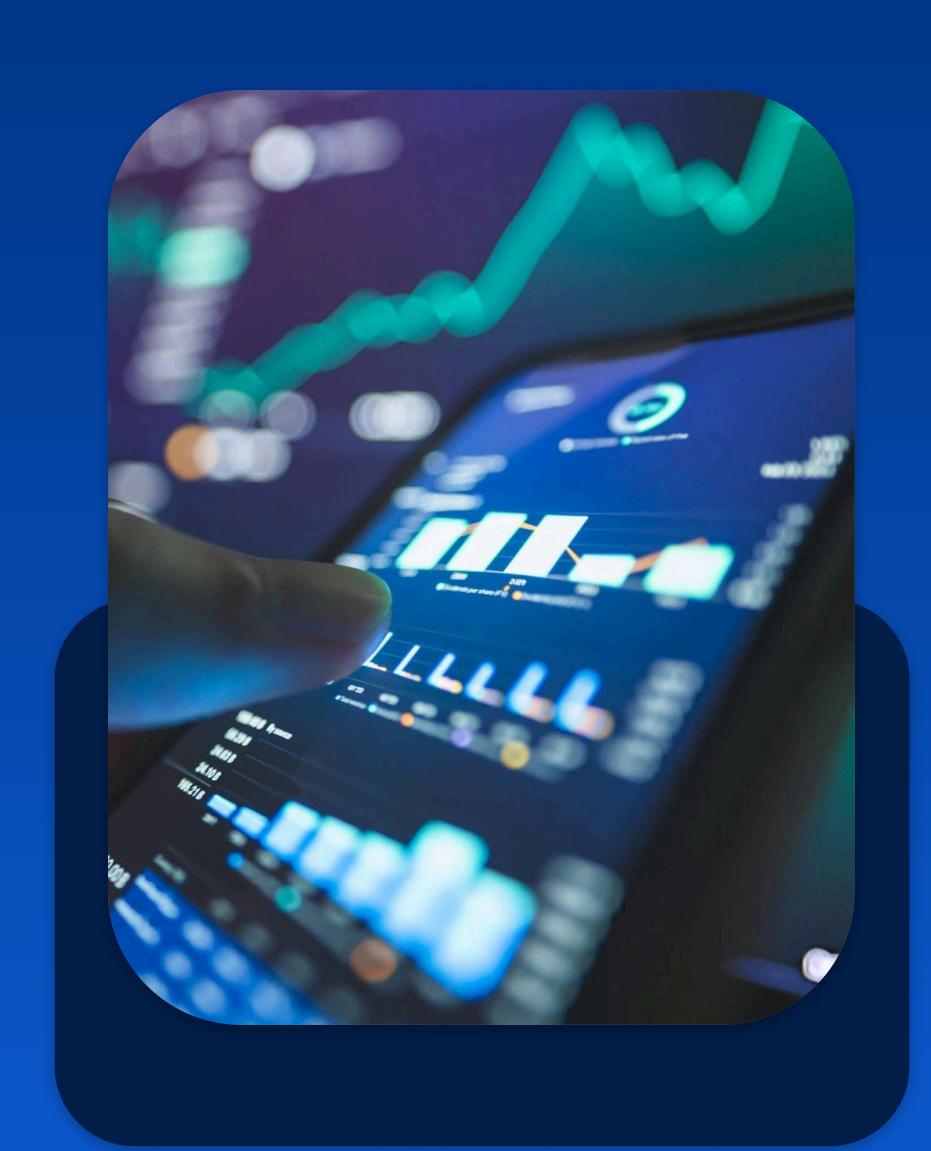# Boosting Campaign Conversions & Marketing ROI with AI-Driven Engagement for a Global Asset Management Firm

A leading global asset management firm, serving institutional, retail, and high-net-worth investors, was investing heavily across digital and offline channels to acquire and retain customers. Despite the significant marketing spend, the brand lacked visibility into user journeys and struggled to connect customer behavior across touchpoints—especially in anonymous, pre-login environments.

Result Metrics

What Success Looks Like with FirstHive

It's not just automation - it's intelligent engagement at scale

28%
Boost in campaign conversions with AI-powered targeting.

22%
Increase in Marketing ROI by cutting wasted impressions.

30%
More dormant users reactivated through churn prediction.

"With FirstHive, we finally broke the silos and gained visibility into every stage of the investor journey. Our marketing decisions are now proactive, predictive, and performance-driven."

– Digital Marketing Head, Global Asset Management Firm

Business Challenges

While the brand had a well-established digital marketing presence, it faced multiple issues that limited conversion effectiveness and increased campaign inefficiency:

- Inability to identify users across channels unless they logged in—limiting visibility into a significant portion of traffic on their website and mobile apps.
- Disconnected marketing systems across 16+ channels—including web, app, social media, emails, SMS, and native ads—meant no Single Customer View (SCV).
- Campaign budgets were being wasted on non-relevant audiences, particularly due to an inability to distinguish between existing customers and prospects in anonymous sessions.
- The need to contextualize experiences at the session level and deliver precise content to users based on intent, not just identity.

Business Impact

Within the first few quarters, the asset management firm saw tangible improvements in marketing effectiveness:

- **28% increase in campaign conversions**, led by AI-optimized targeting and session-level personalization.
- **22% boost in Marketing ROI**, as wasted impressions were reduced by eliminating duplication and irrelevant reach.
- **Improved investor experience**, as behavioral and lifecycle-based triggers delivered hyper-relevant product nudges.
- **30% more effective reactivation** of dormant users through targeted churn prediction campaigns.
- Data-driven insights replaced siloed strategies, enabling **continuous optimization across all 16 channels** under a single intelligence framework.

Solution Provided by FirstHive

To address these challenges, FirstHive implemented its AI-powered Customer Data Platform (CDP) to unify customer identities, optimize decision-making, and enable predictive engagement throughout the investor journey. By integrating data from multiple channels and systems, FirstHive creates a comprehensive, real-time view of each investor to drive smarter, automated marketing actions.

Unified Customer Profiles and Cross-Channel Integration

FirstHive stitched user data across 16+ channels—including website (pre-login and loggedin), mobile apps, email, SMS, social (paid and organic), and native ad networks—using advanced probabilistic and deterministic identity resolution. This enabled recognition of customers even before login, aggregating behavioral signals into unified profiles. These profiles were connected with CRM, marketing automation, analytics, and customer service platforms by ingesting data from web/app behavior, campaign performance, transactional activity, and investor profiles.

AI-Driven Decision Engineering

The platform employed a decision engineering framework to automate marketing actions using AI based on behavioral triggers, lifecycle stages, and conversion likelihood. This ensured personalized and timely engagement at every step of the investor journey.

Predictive Intelligence for Prioritization and Retention

FirstHive leveraged predictive AI models such as churn prediction and customer lifetime value (CLTV) to identify high-value users, prioritize engagement efforts, and reduce attrition risk, ultimately boosting investor retention and lifetime value.

By deploying FirstHive's CDP and AI-powered intelligence layer, the asset management leader moved from channel-level optimizations to a truly unified and predictive marketing ecosystem. The result: stronger investor relationships, increased conversion rates, and a measurable uplift in marketing efficiency.

FirstHive is a Customer Data Platform that unifies, enriches, and activates customer data across all touchpoints. It empowers brands with actionable intelligence, enabling personalized campaigns that drive growth and engagement.

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