

# Leading Mutual Fund House Accelerates Segmentation and Campaign Execution with FirstHive CDP



A leading national mutual fund house, part of a major national bank, sought to revolutionize its investor engagement strategy by more effectively leveraging its customer data. With extensive data distributed across various silos and intricate investor journeys, the client needed a powerful platform to unify data and activate insights at scale.

### Result Metrics

## What Success Looks Like with FirstHive

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

### Rapid Readiness

Data prepped far faster than 15 days.

### Automated Segmentation

Scaled campaigns and slashes prep time.

### Targeted Outreach

For SIP top-ups and dormant investors.

*“FirstHive transformed the way we manage and activate our investor data. What once took weeks now happens in days, empowering our marketing teams to launch precise, high-impact campaigns without IT bottlenecks—driving stronger investor engagement and measurable business growth.”*

– Chief Marketing Officer, Leading Mutual Fund House

### Business Challenges

Despite its market leadership, the company faced significant hurdles in making its data actionable, which limited its marketing and personalization efforts.

- **Fragmented Data Silos:** The client's critical customer data, including transaction histories from mutual fund transfer agents and servicing platforms, was scattered across multiple, disconnected systems. Their existing data warehouse was only capable of storing raw data dumps without any organizational capabilities.
- **Inefficient Manual Segmentation:** Investor profiles were segmented manually by IT teams, a process that was not scalable and led to significant delays and operational inefficiencies. This bottleneck also created problems with last-mile campaign activation.
- **Inability to Identify Anonymous Visitors:** The firm was unable to track or identify anonymous visitors to its website, resulting in missed opportunities for retargeting and personalization.
- **Static and Delayed Reporting:** Business stakeholders relied on static summary reports that were slow to generate. This delayed critical decision-making and hindered the ability to optimize campaigns in a timely manner.

### Business Impact

The strategic implementation of FirstHive CDP yielded substantial and measurable improvements, transforming the client's marketing agility and effectiveness.

- **Accelerated Data-to-Action:** The time required to produce enriched, campaign-ready customer data was drastically reduced from a 15-day window to just two days.
- **Enhanced Operational Scalability:** By replacing manual, IT-dependent segmentation with automated, real-time processes, the client significantly improved scalability and reduced campaign preparation time.
- **Improved Campaign Performance:** Marketing teams could execute highly relevant, real-time campaigns for diverse goals, such as SIP top-ups and reactivation of dormant investors.
- **Data-Driven Decision-Making:** Actionable, real-time dashboards empowered business leaders with immediate insights into acquisition trends, scheme exits, transaction values, and campaign ROI.

### Solution Provided by FirstHive

To address data fragmentation and campaign inefficiencies, the mutual fund house implemented FirstHive's AI-powered Customer Data Platform (CDP). The platform served as a centralized intelligence layer, enabling real-time customer visibility, predictive segmentation, and cross-channel automation—all without IT dependencies.

#### Data Unification & Identity Resolution

The foundation was built by eliminating silos and resolving customer identities across channels.

- Ingested data from mutual fund transaction platforms, website activity, mobile app usage, and internal logs
- Resolved identities using probabilistic and deterministic methods, even for anonymous users
- Enabled real-time identification via exit-intent campaigns on the website
- Consolidated all interaction data into a unified customer view for marketing and analytics

#### AI-Powered Profile Enrichment & Segmentation

With unified data, FirstHive applied machine learning to build actionable customer intelligence.

- Created 360° investor profiles enriched with 170+ intelligent behavioral and transactional attributes
- Empowered marketing teams to independently build dynamic audience segments in real time
- Automated cohort identification for use cases like SIP Top-Ups, Dormant HighRisk users, and Retirement planners
- Removed manual workflows and IT dependency in campaign setup

#### Intelligent Orchestration & Performance Visibility

The enriched data and segmentation intelligence enabled full-scale marketing automation and real-time optimization.

- Activated omni-channel campaigns across Email, SMS, WhatsApp, web push, and app push
- Connected FirstHive with the existing martech stack to orchestrate end-to-end journeys
- Deployed business-aligned dashboards for tracking Sales, Acquisition, Dormant Users, and Campaign Performance
- Used Tag Analysis dashboards to monitor performance at a micro-segment level, ensuring precision targeting and optimization

By partnering with FirstHive, the prominent mutual fund house successfully transitioned from siloed data and manual processes to a state of data-driven personalization and automated execution. The implementation of an AI-powered CDP streamlined operations, empowered marketers with real-time intelligence, and ultimately enhanced investor engagement across every touchpoint, delivering a significant, measurable uplift in ROI.