

How Mindmatrix helped LegacyShield target partners with the right messages at the right time.

WHAT IS LEGACYSHIELD?



LegacyShield is a secure cloud based platform for individuals to store all their important information such as insurance policies, wills, accounts, life stories and final wishes with designated future recipients who will receive the information on a trigger event like death

- Founded in 2015
- Growth platform for financial service companies

HOW DOES LEGACYSHIELD MARKET?

CHANNEL PARTNERS (RESELLERS) & ENTERPRISE ACCOUNTS



Independent financial
and insurance
advisors



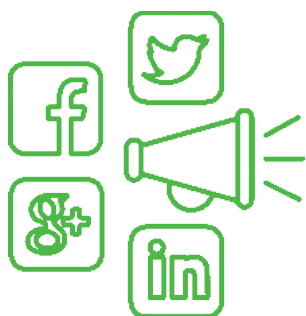
Enterprise
accounts financial &
insurance



Family offices
and wealth
advisors



Human resource
departments,
employers, TPAs



WHAT DID LEGACYSHIELD NEED?

A scalable platform with:

- Sales enablement
- Marketing automation
- Control over messaging and voice



HOW DID MINDMATRIX SUPPORT LEGACYSHIELD?

“The goal was to create visibility for LegacyShield into its channel partner engagement and enforce compliance with industry standards.”

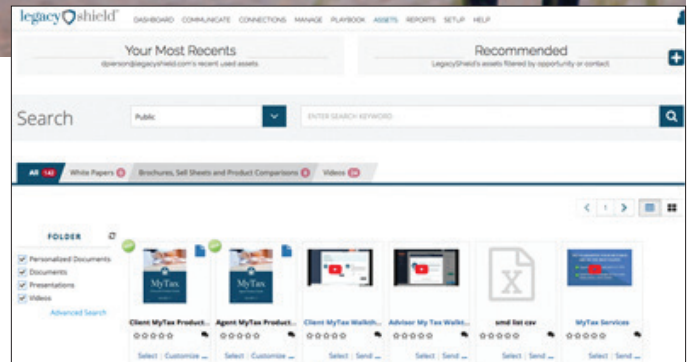
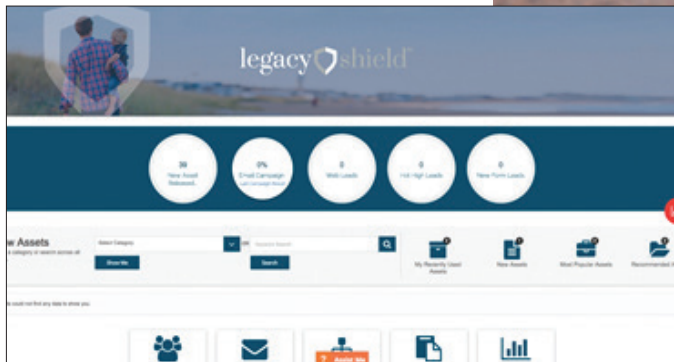
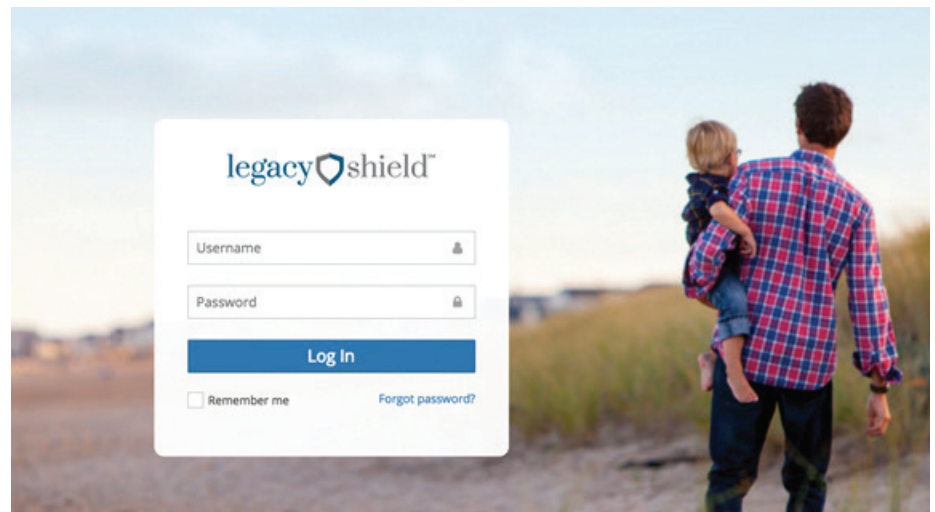
WHAT DID MINDMATRIX OFFER?



Mindmatrix was able to provide a single, fully integrated platform and provide a scalable framework that would allow the software and program to grow with LegacyShield.

A BRANDED, PERSONALIZED CHANNEL PARTNER PORTAL

With Mindmatrix, LegacyShield resellers are able to complete marketing and sales tasks on a regular basis while maintaining compliance.



PERSONALIZED, CO-BRANDED ASSETS FOR PARTNERS



The Mindmatrix platform allowed LegacyShield to

- Easily organize, segment and share marketing and sales assets to Partners
- Enable Partners to track lead interest levels and interactions with assets

NURTURE AND EDUCATE PARTNERS



The Mindmatrix platform allowed LegacyShield to

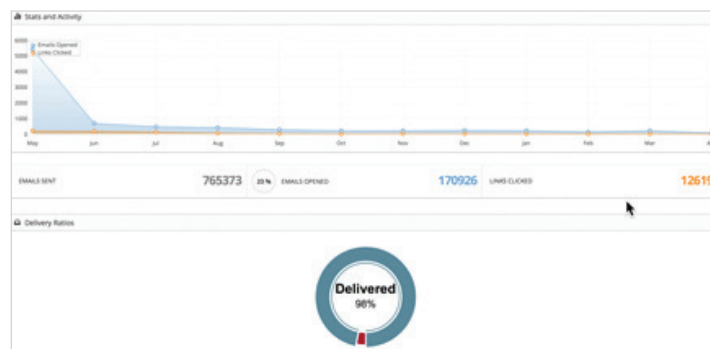
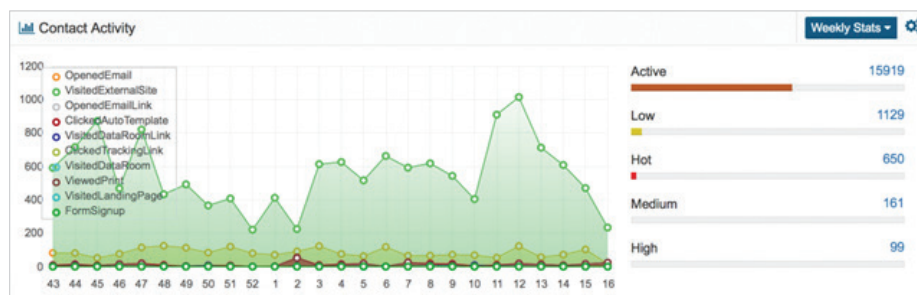
- Engage partners using communication about their products and mission on social media and email
- Track potential partner interest levels

WITH MINDMATRIX, LEGACYSHIELD COULD BUILD BRAND AWARENESS WITH FINANCIAL ADVISORS TO PROMOTE LEGACYSHIELD'S PRODUCTS

Track potential partner engagement on

- LegacyShield's website and blog
- Social media pages (Facebook & Twitter)
- Product education/marketing collateral

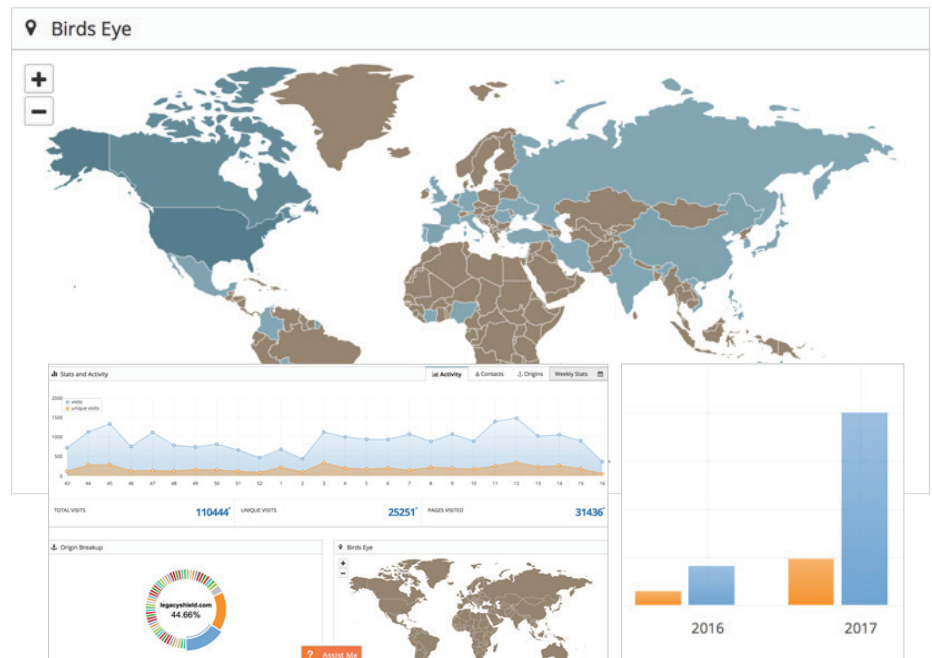
With Mindmatrix, LegacyShield could Build greater relationships with potential resellers to move to the next stage in the channel partner program.



RECRUITMENT AND ENGAGEMENT OF LEGACY SHIELD'S PARTNERS

Automatic engagement with partners

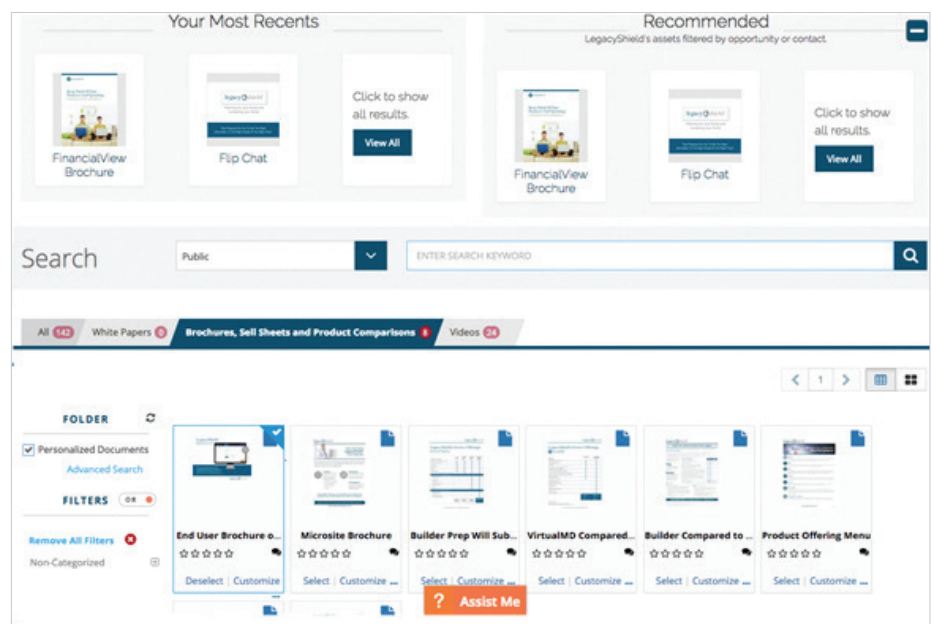
- Over 765,000 emails sent
- Average open rate of 23%
- Click-through rate of 12%
- Over 1 million website visits tracked
- Website traffic increased by 40%
- Potential partners increased in engagement over time



COMPLIANCE-READY ASSETS AVAILABLE ON-DEMAND TO PARTNERS

This solved common challenges in partner programs:

- Sharing co-branded assets to partners
- Control over standardization and branding



SHARED REPORTING FOR MARKETING TEAMS

LegacyShield's marketing managers could also track partner's:

- Popular marketing and sales assets
- Ratings on assets used by partners
- Open and click-through rates
- Download and usage activity



A CHANNEL MANAGER PORTAL WITH INSIGHT

LegacyShield's channel managers are able to track:

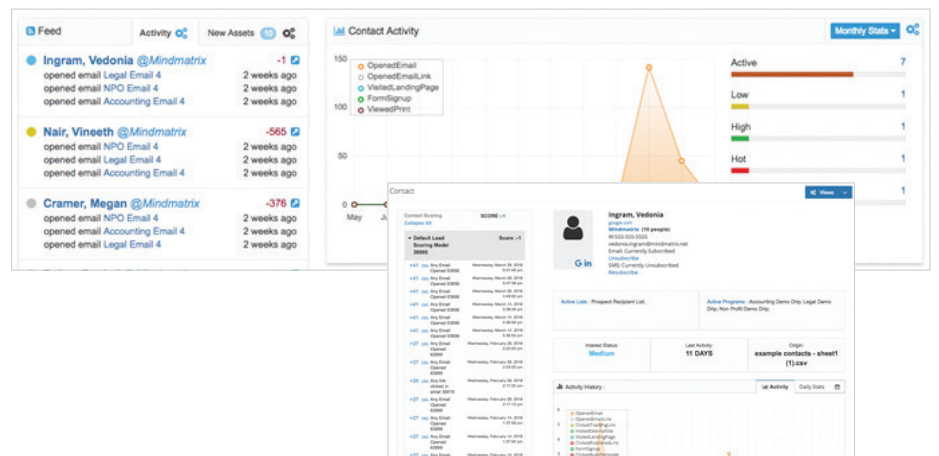
- Partner engagement
- Campaign activity
- Opportunities registered
- Most active to least active partners



LEAD ACTIVITY TRACKING TO HELP PARTNERS CLOSE OPPORTUNITIES

Partners can automatically start

- Onboarding their clients using Mindmatrix
- Importing their own leads
- Tracking lead interaction
- Registering and close opportunities



HOW LEGACYSHIELD IS GOING TO CONTINUE TO ENABLE THEIR PARTNER PROGRAM WITH MINDMATRIX?

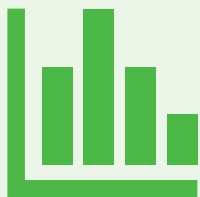
Content syndication for partners

- Enable channel partners to expand their brand and marketing reach with automated email campaigns and landing pages

Marketing automation and sales enablement for partners

- Engage Partners via sales playbooks to help them better sell LegacyShield's product lines
- Training, certification and onboarding of partners

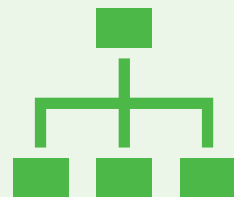
TAKEAWAYS



Content syndication and insight into collateral used by partners



360 degree view into partner engagement and development



Asset sharing and marketing automation tools for partners

Mindmatrix offers Channel & Sales Enablement software for direct and indirect sales channels. Mindmatrix is the only provider of a Single Unified Platform that combines PRM software, Direct Sales and Channel Enablement, Channel Marketing Software, Marketing Automation software and Marketing Asset Management. Mindmatrix takes you through every step in the sales process from lead to revenue, enabling your salespeople and channel partners to sell more, faster.

CONTACT US

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