



Ani Matson

NEA Member Benefits

OFFICER'S AWARD

## America's Most Courageous CMO Nominee — Ani Matson

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*"Our time is limited, so don't waste it living someone else's life. Don't be trapped by dogma – which is living with the results of other people's thinking. Don't let the noise of others' opinions drown out your own inner voice. And most important, have the courage to follow your heart and intuition."*

– Steve Jobs

That quote pretty much sums up [Ani Matson](#), who until recently was the CMO at NEA Member Benefits. Ani had the courage to rethink marketing in the context of the entire customer experience versus short term expedience. And I'm not being melodramatic. Consider for a moment that prior to taking the reigns, NEA Member Benefits sent new customers over 50 separate pieces of communications, offering a wide range of products and services. While this approach allowed the company to achieve its marketing goals it ultimately had a deleterious impact on perceptions of the brand and response rates. After considerable study and consensus building, Ani and her team reduced the number of new member communications to six touches. The results were staggering—a 20% increase in participation and significantly improved customer satisfaction ratings. Less turned out to be more. And while [The CMO Club](#) recognized Ani with its Officer's Award, I think next year they need a new category, Most Courageous and here's the first nominee!

**Drew:** Could you explain a little bit about the business model on NEA Member Benefits and its relationship to NEA?

**Ani:** NEA Member Benefits is a for-profit entity owned by the NEA, the National Education Association, which represents public school teachers and other staff who work in public schools. We research insurance and retirement plans and get benefit deals for teachers. We talk to top players, we rank them, then we offer the benefits and members enroll into these benefit programs.

**Drew:** NEA Member Benefits markets to three million members plus their families. It's certainly a very well defined target. What does marketing look like given that?

**Ani:** You still need an intentional strategy. In fact you have to be very precise because you are marketing to people who you want to have a relationship with for the length of their career and after they retire. It's not just about finding an audience for your product, it is about serving a defined group with the best portfolio of products, in the most relevant way. The stakes are high, and if you become noise by acting like any other marketer out there, you'll get turned off and you would have missed out on building a relationship that would last a lifetime.

You can contact members via direct mail, which is the way we used to market for many years, but you can't just offer the same thing to three million people. So instead, as people go through their life stages, we try to give them relevant offers at specific times in their lives. We're just trying to build offers and communications around member journeys.

Right now the secret is to get the attention because now almost everybody is doing customer-centric marketing. So now it's about multi-channel marketing and building experiences versus just sending the information and waiting for the results. That's the key.

**Drew:** What is a journey now?

**Ani:** Everything is set up and automated and triggered so that members can receive the appropriate information at the appropriate time based on their behavior, what they do, and what they tell us.

We've scored the whole membership file, and based on

those scores, we decide which offers are most appropriate to market to whom. You have to watch members and understand them deeply and understand their behavior, understand their needs, understand their attributes to able to offer them the right thing. It's beautifully analytical. They have children, they get married, they buy a car, and as they go through those stages we have different offers for them.

**Drew:** Let's talk about a win that you've had where suddenly you were able to get the right product in front of the right person at the right time with the right message.

**Ani:** The one that I'm most proud of the team for doing is the reimagining of the content strategy and the way we deliver the content to the members. What we are trying to do is optimize the content at the right gaps of a member's journey. We have come up with a huge roadmap for delivering the right information to the right members.

The best results so far have been from the new member experience that we built last year. New members were cordoned off from receiving everything that other members would receive. Instead, we designed a different experience for them, basically welcoming them to the organization, showing them what's available to them, giving some freebies to them and just inviting them to come and explore.

By not pushing, we were able to get better results than the way we had done it in the past. We touched them only six times last year and increased participation by 20%. In the past, we had touched their comparable cohort 50 times.

**Drew:** That's an incredible story. Do you have brand health metrics tracking so you know how people perceive you?

**Ani:** We do. We were initially thinking of using Net Promoter Score, but then we came up with what we call a "brand index". It is similar to the Net Promoter Score but it takes into consideration other factors we thought were important for our brand. We have a relationship with Harte Hanks, and they run a longitudinal study and the "brand index" for us once a year. So we take the pulse on percep-

tions of the membership once a year. We've been tracking member perceptions for the past, I think, seven years and seeing how their opinions about the organization have changed. That is amazingly positive for us.

**Drew:** So, if you were to sit down with a fellow CMO, what sort of advice would you give them in order to get started?

**Ani:** Get rid of funnels and think past the buying. If you don't have a good experience after you buy, you're not coming back for more.

Look at the stages of the experience, the journey that any human being would go through when they have a need and then as they look to fulfill their need. I would ask the question why, what do they use it for? Where do they use it? And then I would start to build the experience around that.

### About the author

Drew Neisser is the CEO and founder of Renegade, the NYC-based social media and marketing agency that helps inspired CMOs cut through. He is the champion of Marketing as Service, a philosophy he espouses in his writings on [FastCompany.com](https://www.fastcompany.com), PSFK, TheDrewBlog and The Cut, a much-appreciated monthly newsletter. If you have a CMO success story to tell, let Drew know at [dneisser@renegade.com](mailto:dneisser@renegade.com).

