

Vanguard Boosts Conversion Rates 15% by Trusting AI to Strengthen Client Messaging



Persado unlocks valuable data and refines customer marketing messages

With over \$7 trillion in assets under management globally, Vanguard is one of the world's largest investment companies. The Vanguard Institutional division primarily serves retirement plan sponsors.

Vanguard Institutional's clients are their top priority, and as such, the company wants to ensure their customers get the content they want and need. To do this, they needed to find a solution that could scale to meet their need to personalize customer messages.

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The right message is critical in a complex retirement landscape.

Vanguard Institutional is working to evolve their marketing approach to better personalize their customer experiences. Because the division focuses on B2B sales, their target audience of retirement plan sponsors can be narrow.

Vanguard[®]

“In some cases, we have a fixed number of individuals that make critical decisions for billions of dollars of investments. Personalizing a message for them can be a challenge.”

Anthony Toguchi

HEAD OF INSTITUTIONAL
DIGITAL MARKETING,
VANGUARD

Operating in a heavily-regulated sector means Vanguard Institutional must pay careful attention to how and where they advertise. LinkedIn is the sole social media platform that Vanguard Institutional uses, and it can be difficult to stand out. As a result, the division needed to find messages that would resonate and encourage prospects to learn more about how Vanguard could help them achieve their goals.

Vanguard Institutional was struggling to determine which words were adding value to their marketing messages and inspiring action. They did A/B testing with their marketing messages, but they lacked testing capacity and their marketing team decided it was time to leverage the newest technologies.

Enter [Persado](#), an AI content generation and decisioning platform delivering highly effective personalized language, faster than humans alone can deliver.



The solution: use Persado AI Experimentation to uncover a winning message

Anthony Toguchi, Head of Institutional Digital Marketing at Vanguard, was familiar with Persado's AI content generation and decisioning platform before arriving at Vanguard. When he learned that Vanguard's Retail Investor Group group was already engaged with Persado, Toguchi thought it was a natural move to test in his division as well.

"It was a perfect segue to say, 'Now that we're engaging our business customers, is there an opportunity with Persado technology to get more specific around the messaging we're trying to communicate to our institutional customers?'" said Toguchi.

Vanguard Institutional decided to partner with Persado to design an experiment to fine-tune their LinkedIn marketing messages. The division was particularly keen to tap into the Persado:

- [AI Experimentation Engine](#), which generates combinations of concepts and phrases to appeal to different customer needs
- Language Knowledgebase, the world's largest knowledge base mapped to human emotion and trained for enterprise communications
- Insights into audiences, which drives data back to the business to understand why customers engage with specific language elements over others, and to build more effective content in the future.

Vanguard Institutional provided control content to kick off the LinkedIn messaging experimentation. Then the Persado machine learning engine revved up. By identifying message components and analyzing specific words, phrases, and emotions, Persado used 8 AI-generated variants, which represented 64 permutations on the message, to test against the control on LinkedIn and surface data. Vanguard Institutional was able to review the key messages and decide which ones resonated or connected most with clients and prospects.



The Persado platform will help Vanguard Institutional today and into the future:

- Short-term: Experimentation helped uncover the exact phrases that resonated with customers in LinkedIn marketing messages.
- Long-term: Deliver relevant and meaningful content to clients and prospects by identifying opportunities to incorporate data-driven insights from the Persado AI into the division's marketing mix.

Persado delivers 16% increase in conversions and actionable insights for future campaigns

Vanguard Institutional was thrilled to enhance its ability to connect with customers via LinkedIn by serving them the content they wanted. The Persado AI-generated message achieved a click-through rate of 15.76% higher than the control message.

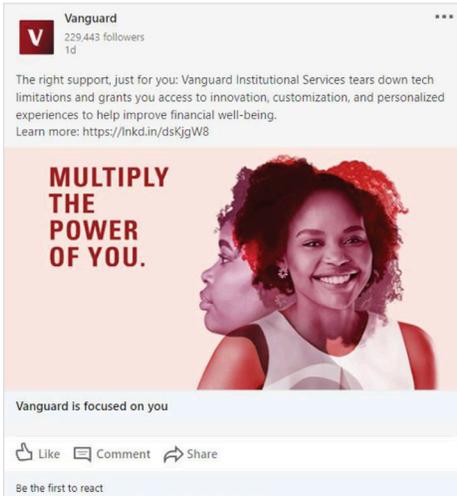
Persado unlocks tremendous value for the division through experimentation and collecting data at a scale and level previously beyond their reach. The insights allow the team to reimagine how it connects with prospects, and how they might scale these insights and personalized language across audiences and content in the future.

And the technology means they can add new expertise to the team without costly and time-consuming employee upskilling, while at the same time freeing employees for more strategic work.

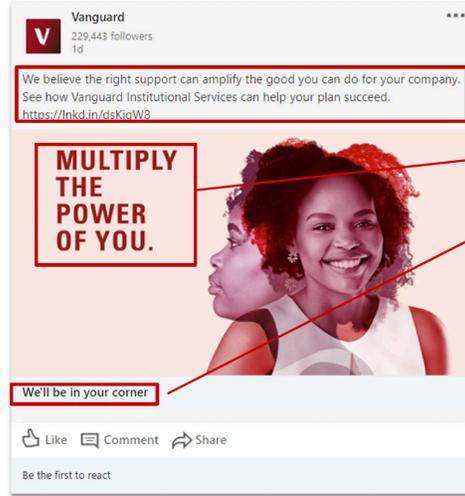
Toguchi finds the information invaluable and believes it makes a strong business case for using Persado. "When we're given money to spend on marketing, Persado experimentation and testing is the kind of investment that lets us come back and demonstrate why we used this process because it offers hard data to support the decision."

Persado’s language AI helps Vanguard position its message with the right formatting, emotion, description, and functional call-to-action.

Control



Persado



Post Text

Video Text

Headline

- **Formatting:** stylistic or structural elements (e.g. case, symbols, imagery)
- **Emotional:** words and phrases that have an emotional impact
- **Functional/CTA:** language that directly impels a specific action, response or process
- **Descriptive:** the different ways of describing the offer or product

Persado supports Vanguard Institutional every step of the way

It can sometimes be overwhelming to implement new technology, but Lauren Schickling, Channel Marketing Manager at Vanguard, liked that Persado provided excellent support.

“Working with Persado day to day, the team guided us step by step through this process,” Schickling said. “I believe this was a first for our institutional marketing team with testing AI functionality, so it was new to us. But the Persado team was able to walk us through that process, which was very helpful.”

Toguchi said Persado gave the team the exact thing it needed: “You’ve got to have an environment where it’s okay to fail safely, and to learn and to apply things. Sometimes it takes a provider like Persado to come in and say: ‘Did you know that when you go to market, your message may not resonate? But here’s a way in which you can safely do that.’”

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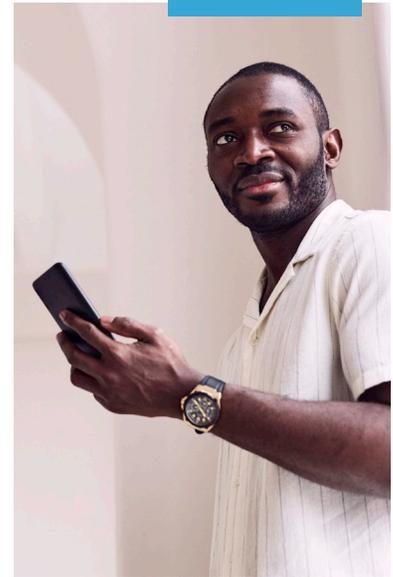
Lauren Schickling

CHANNEL MARKETING MANAGER, VANGUARD

Looking forward: Vanguard unlocks new value with Persado AI data

Persado helped Vanguard Institutional in three key areas:

- 1. Insights:**
Provided Vanguard Institutional with data-backed insights into language that is effective in delivering relevant content to their audience
- 2. Process:**
Identified gaps where the Institutional team could better meet audience needs
- 3. People:**
Allowed employees access to rich data for better strategic decision making without needing to upskill



For Toguchi and Schickling, the Persado Platform opens up an entirely new approach to data-driven marketing, in a way that meets the unique requirements of their business today and in the future.

“I think part of the challenge has been that we’re a B2B organization with a very specific audience, so we don’t get a lot of opportunities to use technology like this to get better insights,” Toguchi said. “If you think about it, our audience is narrow. Persado is helping us pave the way forward.”

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Persado + Financial services

Innovative banking, payments, lending, investment, and fintech organizations use Persado to boost acquisition, loyalty, and value across an array of products and services, including credit cards, auto and personal loans, mortgages, checking and savings accounts, business banking, and wealth management.

Persado is the AI content generation and decisioning platform that unlocks billions in incremental revenue for data-driven enterprises. Leading brands including J.P. Morgan Chase, Humana, American Express, Comcast and Dropbox rely on Persado to realize the untapped potential in every message. Words matter. And when they are mapped to human emotion, generated by the Persado AI, and powered by machine learning, organizations reach a tipping point in their ability to understand the customer and personalize language experiences across touchpoints and channels—creating a continuous ability to learn, gain further customer insights, and drive ever higher performance.

Visit [Persado.com](https://persado.com) to learn more.