

Life Insurance - Term Life Plan

A CASE STUDY

Introduction

The client aimed to boost lead generation for its term life plans during the peak fiscal quarter, focusing on improving lead quality and flow consistency.



Challenges

Issues included:

- ↘ **Inconsistent Lead Flow**
- ↘ **Variations in lead quality**
- ↘ **Rising costs during competitive market periods.**



The focus was on improving the conversion rates while reducing the cost per acquisition.

Platforms Selected



Google Ads & GA360

for precise targeting and real-time optimization

Media Plan

40%

(Search, Display, Video)



Meta (Facebook & Instagram)

for reach and engagement

30%

(Facebook & Instagram ads)



YouTube

YouTube for video storytelling,

20%

(YouTube ads)



Microsoft Advertising

for high-intent audiences.

10%

(Multimedia Ads)

Campaign Strategy

The strategy involved always-on search ads, display and remarketing campaigns, video storytelling on YouTube, and engaging Click-to-WhatsApp ads on Meta to initiate direct conversations.

Campaigns Breakdown



Google Ads

Type Search & Display

Details

Targeted high-intent keywords, remarketing to users who previously visited the landing page.

Metrics

CPL reduced by **10%**, **79%** QoQ increase in conversions, 6x increase in qualified leads.



Meta (Facebook & Instagram)

Type Click-to-WhatsApp Ads

Details

Engaged users through personalized ads, driving them to WhatsApp for a seamless quote request process.

Metrics

4x increase in lead-to-quote generation, **5x** ROI with reduced churn during initial conversations.

Campaigns Breakdown



Google Ads

Type Video Ads

Details

Focused on storytelling with short, impactful videos that included clear CTAs for quote requests.

Metrics

Improved brand awareness with a **49%** increase in brand searches YoY, CTR increased by **4%** during peak campaign phases



Microsoft Advertising

Type Multimedia Ads

Details

Used visually rich ads on Bing's SERP to capture users' attention during non-peak times.

Metrics

2x increase in conversions, **20%** reduction in CPA, **68%** uplift in lead scores

Campaign Adjustments and Optimization

Inconsistent lead quality

Adjustment Made Implemented lookalike audiences and refined interest-based targeting on Meta to focus on high-quality prospects.

Impact Increased lead conversion rates by **30%**, with a more consistent flow of qualified leads.

Rising costs in search campaigns

Adjustment Made Introduced GA360 integration with Google Ads for real-time bid adjustments and audience segmentation.

Impact Lowered CPL by **10%**, optimized ad spends for better cost efficiency.

Low engagement on WhatsApp

Adjustment Made Transitioned from standard chatbots to more interactive form-based journeys using Haptik's AI integration.

Impact 4 in 10 users completed journeys in their native language, increasing engagement and user satisfaction

Detailed Metrics

Total Leads Generated

40,000+

Across search, social, and video platforms.

Conversion Rate (Google Ads)

79% QoQ increase

Reflects the effectiveness of targeted search ads.

Cost Per Acquisition (CPA)

₹1,200

Achieved through optimization and audience segmentation.

Return on Ad Spend (ROAS) - Meta

5x

With Click-to-WhatsApp ads driving high engagement.

Lead Quality Score Increase

68%

Measured through Microsoft's internal lead scoring mechanism.

Detailed Metrics

Campaign	Platform	Metrics
Google Ads (Search)	Google Search	<ul style="list-style-type: none">• Leads: 15,000+• CPL: ₹1,200• Conversion Rate: 6.5%• CTR: 8%
Google Display Network (GDN)	Google Display	<ul style="list-style-type: none">• Impressions: 12 million• Clicks: 120,000• CPL: ₹1,500• Conversion Rate: 4%
YouTube Ads	YouTube	<ul style="list-style-type: none">• Impressions: 8 million• Views: 1.5 million• View-through Rate (VTR): 18%• CPL: ₹1,800
Meta (Facebook & Instagram)	Click-to-WhatsApp	<ul style="list-style-type: none">• Leads: 10,000• CPL: ₹1,000• Engagement Rate: 12%• Conversion Rate: 5%
Microsoft Advertising	Multimedia Ads	<ul style="list-style-type: none">• Leads: 5,000• CPA: ₹1,600• Conversion Rate: 5.5%• Lead Score Uplift: 68%

Key Metrics

Average CPL

₹1,200 to ₹1,800
depending on the
platform

Total Leads

40,000+ across
platforms

Return on Ad Spend (ROAS)

5x on Meta, 4x
on Google Ads

Overall Conversion Rate

6.2% weighted
average across
platforms

Cost Reduction

10% reduction in
CPL through
optimization

Summary of Learnings

Best Channels

Google Ads proved most effective for high-intent leads, while Meta drove volume through broad reach and engagement.

Optimization Techniques

Real-time bid adjustments using GA360 and targeted Click-to-WhatsApp ads were critical for lowering CPL.

Scaling Strategy

Leveraging seasonal budget adjustments and refining targeting criteria were essential to achieving scale without compromising lead quality.

What Worked Best

Combining video content on YouTube with targeted search ads and conversational engagement on WhatsApp provided a balanced approach to lead generation.

This structured approach illustrates the specific challenges, solutions, and outcomes for lead generation in the insurance sector, providing a detailed view of how digital platforms were leveraged to optimize performance

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