

Janet Caligiuri

Marketing Professional



(914) 484-0411 • janetny105@yahoo.com
www.janetcal.com

Key Career Accomplishments for Janet Caligiuri

During her 20+ years as a marketing professional, Janet has had the opportunity to implement a vast array of programs and new products in order to impact bottom line results and achieve marketing ROI objectives for various companies. Overall campaigns yielded an average ROI of \$5.00 for every \$1 invested. The following outline highlights some of these key accomplishments.

AXA Equitable Life Insurance Company

Initiated, led and directed campaigns in support of AXA Equitable's retail and wholesale distribution channels.

1. Email Marketing Program: Introduced new email marketing program to support field force acquisition and cross-sell efforts. Program touched over 478K insurance and annuity clients, generating a 3.2% conversion rate and \$400M in assets under management (AUM).

2. Annuity Prospect Campaign: Led the development of new annuity prospect campaign that utilized external behavioral data overlays to target and segment lists with letter copy versioned for each audience segment.

Campaign Mailing Qty: 100K

Target Audience: Purchased prospect lists appended with proprietary behavioral/attitudinal data overlays from an external provider. Segmented the target audience (treatment group) using the following behavioral categories and demographic data:

- Self-directed when purchasing both investments and life insurance
- Broker-oriented in both investment and life insurance purchases
- Sweetspot category of being both self-directed and broker-oriented (e.g., self-directed in investments and broker-oriented when buying life insurance and vice versa)
- Ages 30 – 65
- Income of \$50K+

Results: Program generated \$8.9M in 1st year premium.

3. Orphan Client Re-connect Campaign: Introduced an integrated campaign to re-connect with orphan clients (clients with agents who had left the company and were awaiting re-assignment to a new advisor).

Campaign Goals:

- Support branch CRM re-connection activities
- Collect email addresses in order to implement a more cohesive follow up plan through email
- Support AXA in the retention of "at risk" annuity clients
- Reinforce the brand by keeping the AXA name in front of these clients.

Campaign Parameters:

- Campaign Mailing Quantity: 55K
- Target Audience: Utilized statistical models to target orphan clients (in field branches where a Customer Relationship Manager existed). Campaign had 3 main segments consisting of clients who either:
 - Had a high or medium propensity to buy life insurance, annuities or a brokerage product
 - Were at risk of surrendering their existing annuity
 - Were mailed in prior orphan campaigns and did not respond
 - Ages 35-70
 - Income \$50K+

Results: Campaign generated a 0.5% sales rate, \$79M in AUM and a 100% lift in response for the treatment group versus the control group.

4. Required Minimum Distribution Campaign: Launched campaign to clients who were required to take a minimum distribution from their annuity at age 70 1/2. Mailed 5K annuity clients. Program lowered product surrenders by 50%, making it an effective retention program. In addition, the campaign generated a 2.7% sales rate and \$14.8M in AUM.

5. Webinar: Developed online webinar for the B-to-B wholesale channel of independent financial planners. 150 brokers participated in the webinar. Webinar and associated follow-ups accounted for a 3.5% increase in business from this audience segment.

TIAA-CREF

Initiated and led the development of campaigns and new product launches in support of TIAA-CREF's direct-to-consumer marketing channels.

1. Mutual Fund Product Launch: Introduced TIAA's new mutual fund product line. Built integrated marketing plans and budgets of \$3.3M. Overall marketing plan campaigns generated a total of \$1 billion for the mutual fund product line over a 2-year period.

2. Mutual Fund Direct Mail Campaign: Developed initial mutual fund direct marketing launch campaign introducing the new funds to 100K of TIAA-CREF's existing pension clients.

Results: The "Get More of What You Want From Life" Campaign yielded a 5% conversion rate and \$50M in AUM.

3. IRA Product Launch: Introduced TIAA's new IRA product line to the marketplace utilizing a \$500K budget. First year product launch yielded over \$2M in AUM for the product line.

4. After-Tax Annuity Product Launch: Introduced TIAA-CREF's new after-tax annuity product line. Built integrated marketing plan and budget of \$3M. Overall marketing plan campaigns generated a total of \$1 billion for the annuity product in a 1-year period.

5. Annuity Direct Mail Campaigns: Implemented various annuity cross-sell direct marketing programs to high-value clients. Campaigns targeted 100k -200k clients with pension accounts of over \$100K+. Each campaign generally yielded 1% - 2% response rates and up to 10% conversion rates and between \$30M and \$60M in AUM.

6. Association Marketing: Managed association marketing channel for TIAA (Texas Medical Association and the American Veterinary Medical Association) including developing co-branded marketing materials, seminars and direct mail to association members.

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Janet Caligiuri Marketing Professional - Overview

With 20+ years of marketing experience, in consumer and B2B environments, Janet has worked on many high profile marketing projects for several prestigious companies. She's a strategic thinker who can develop integrated marketing plans as well as targeted campaigns directed at specific audience segments. She's had extensive experience with new product launches and branding, direct response/database marketing, web-based communications, strategic planning, campaign ROI analysis and tracking, and exposure to new media (webinars, email and social media etc.).

In addition, Janet had the opportunity to be part of a global consulting team at AXA Equitable. She worked with their subsidiary in the United Kingdom to formulate recommendations for integrating Voice of the Customer (VOC) data into key business processes. Utilizing her skills in strategic marketing planning and (online and offline) direct marketing, Janet has generated millions of dollars in assets for such companies as AXA Equitable, TIAA-CREF, and MetLife. Janet is an energetic individual who loves the challenge of bringing fresh marketing ideas to new projects in order to improve bottom line results.

RECOMMENDATIONS

Janet is a keen strategic thinker with great creative instincts. She is an excellent, collaborative leader and partner, championing creative work and supportive of all the players. Her creativity gives her valuable insight into marketing problems and solutions. She is results-driven and can resolve any challenge that arises during assignments. We always look forward to working with her.

– Mark Barry, Owner, M. Barry and Company

I've had the pleasure of knowing and working with Janet for over 15 years. During that time she conducted herself with the highest level of professionalism, always taking the time to make thoughtful decisions. She created numerous marketing programs and materials which made a positive impact on the company's bottom line. I wholeheartedly recommend her to any company considering her employment.

– Susan Wood, Director of Marketing - LI Branch, AXA Financial

Janet is wonderful to work with. She has excellent management and communications skills, and is able to handle numerous projects at the same time. She is always willing to go above and beyond what is expected.

– Eileen Forrest, Vice President, AXA Equitable

I worked with Janet on the email marketing program at AXA Equitable. Janet's professionalism and attention to detail, while at the same time having the ability to see other points of view, made the development come in on time and on budget. Janet accomplished the goals of the unit by working with internal and external areas in a way that made them seem effortless. Her ability to manage her team was beyond reproach, and I would enjoy working with Janet on any projects going forward. I recommend Janet to any company that needs a proven leader with great people skills.

– Michael Lordi, Manager, Customer Marketing Group, AXA Equitable

REFERENCES

Beverly Asselstine

Vice President, Merrill Lynch

(609) 274-5528

Beverly_Asselstine@ml.com

John Wesley

Director, TIAA-CREF

(516) 850-6318

jwesley@tiaa-cref.org

Kirk M. Kozero

Marketing Manager, TIAA-CREF

(610) 346-7680

kkozero@tiaa-cref.org