

Lisa Pollack

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EXECUTIVE SUMMARY

An innovative and performance-driven **Life Insurance Marketing Executive**, providing the vision and strategy to lead companies to market growth and increased profitability. Combining data driven strategies with insurance industry knowledge to develop and execute new and innovative product and service concepts.

- **Life Insurance Experience:**
 - **Insurance Carrier Relationships:** Served 15+ Life/Health Insurance Carriers. Services include Profile/Persona/Model Building, Data Procurement, Competitive Intelligence, Market Research, Call Center/Sales Processes, Persistency and LTV Analysis, and marketing campaigns for Customer Acquisition and Cross-Sell.
 - **Products:** Final Expense (Guaranteed Issue/Simplified Issue), Term Life, Whole Life, Universal Life, Accidental Death, and Annuities. Additional product experience: Disability, Dental, Medicare Advantage/Supplement, Cancer/Critical Illness, Hospital Indemnity.
 - **Distribution Channels:** Direct to Consumer, Agent/Producer, Third-Party Affiliations, Workplace Benefits
- **Highly accomplished, insurance subject matter expert with 20+ years' experience:** Offering valuable insights into the influence of external factors on present and future business operations, while also formulating effective solutions and strategies to address potential challenges and opportunities. Instrumental with keeping clients up to date with industry and competitor news and developments.
- **Market Research / Competitive Intelligence:** Researched and published competitive product guides for clients considering entering new insurance product markets and distribution channels. Product guides included eligibility requirements, product benefits, pricing, marketing materials, and consumer perception of product and brands. Guides distributed to and used by multiple teams within the carrier, including marketing, product, actuarial, and compliance.
- **Strategic Partner:** Providing data-driven advisement to key stakeholders, including clients, LOB, sales, and executive leadership, on opportunities, growth strategies, advertising, and sales. Proficient in identifying correlations between client requirements, the competitive landscape, and the organization's strengths.
- **Communication / Relationship Building:** A thought leader and influencer with exceptional communication and presentation skills. Able to build robust and mutually beneficial business relationships at all levels within the organization and clients. Assist marketing team with identifying and resolving compliance and underwriting roadblocks.
- **Leadership:** Experienced in leading, building, and developing high-performing, cross-functional teams.

CORE COMPETENCIES

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|---------------------------------|---------------------------|----------------------------|
| • Insurance Industry Knowledge | • Growth Marketing | • Strategic Thinking |
| • Marketing Strategy / Roadmaps | • Credit Data Utilization | • Database Marketing |
| • Client Relations | • Market Research | • Competitive Intelligence |

PROFESSIONAL EXPERIENCE

ADREA RUBIN MARKETING, INC.

1993 - Present

Executive Vice President, Strategic Solutions (2023 - Present)

Architect and execute the strategic vision for Insurance marketing initiatives, with a focus on Life Insurance. Lead daily operations and a cross-functional team of account administrators, media buyers, and analysts. Oversee process development, budget administration, and performance analytics.

- Created Go to Market strategy for a life insurance pay-per-call program that yielded \$20 million in year one premium within five years of program launch, poised to achieve \$80 million in recurring revenue.
- Architect of multiple direct to consumer insurance acquisition campaigns with a total annual budget of \$8 million. Campaigns on target to deliver 23.5% ROI.
- Initiated successful life insurance marketing campaign optimizations resulting in 150% increase in profitability through analytics and strategic planning.
- Identify and implement data-driven strategy optimizations for response, pay rate and persistency to continuously improve growth rates resulting in 30% decrease in Cost per Acquisition.
- Direct and lead the paid marketing lead generation strategy. Cross-functionally partnered with key client stakeholders to set objectives and goals, research and define target audiences. Designed and coordinated business rules, acceptance criteria, and distribution path. Increased qualified traffic by 35%.
- Build lasting client relationships and conduct regular business reviews/state-of-the-industry meetings with life insurance client C-level executives.
- Partner with executive leadership, making deep-impact decisions on long-term strategies and growth goals. Evaluate present-state, and advise on future-state roadmaps, opportunities, and process improvements.
- Reset expectations of new product launch between client marketing and underwriting teams.
- Serve as the Voice of the Client. Analyze internal metrics, client feedback, campaign effectiveness, competitor intelligence, and market trends to continuously improve services, processes, and client success.
- Manage and mentor team members. Champion a positive work environment and create team and individual success plans.

Vice President Marketing Strategy (2011 - 2023)

Developed and implemented client marketing and brand strategies, identified, and capitalized on growth opportunities, and created and executed campaigns. Led the team through all elements of media planning, buying, measurement, and optimization.

- Created and executed new customer acquisition marketing campaigns for clients across direct mail, digital, print, and pay-per-call tactics.
- Increased internal profit margin from 15% to 35% on individual life insurance client campaigns.
- Full financial accountability, including budget oversight and cost tracking. Evaluate campaign ROIs and conceptualize innovative, cost-effective strategies.
- Created and executed new customer acquisition marketing campaigns for clients across direct mail, digital, and print media.
- Advised cross-functional teams on marketing performance insights, aligning on the most effective data-driven strategies.
- Managed relationships with external vendors, ensuring they met service and operating level agreements.
- Reviewed and executed contracts, agreements, and SOWs with client contact and procurement departments.

EDUCATION

Bachelor of Arts - Indiana University Bloomington

TECHNICAL SKILLS

P&C Insurance License, Microsoft Office, Google Data Studio, Invoca, MediaAlpha