

A Targeted AI Outreach Strategy

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Using Causal Inference to Identify Persuadable Members and Maximise ROI.

- **Objective:** Reduce member churn through prioritised outreach.
- **Result:** Identified Top 65% of members where outreach drives value.
- **Impact:**
 - 5.8% reduction in peak segments
 - a profitable 1.5% lift across the broader campaign (Top 65%)



Finding the "Persuadables"

Focus on identifying those members we can **truly influence**.

1

Sure Things

Will stay anyway.

📄 Action: Don't Disturb.

2

Persuadables

Will stay **only if contacted**.

📄 Action: TARGET.

3

Lost Causes

Will leave anyway.

📄 Action: Don't Waste Budget.

4

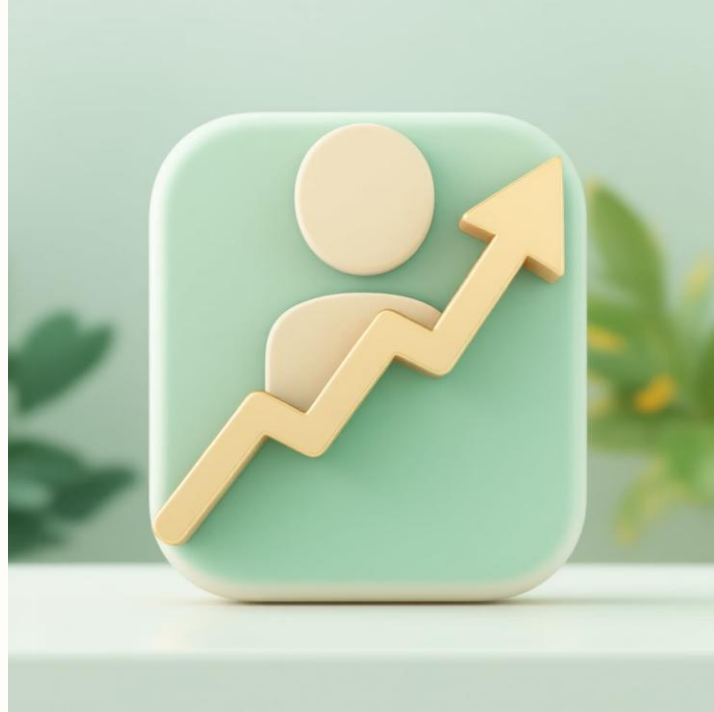
Sleeping Dogs

Will leave **if we annoy them**.

📄 Action: Do NOT Call.

- Standard models merely predict risk (who is leaving).
- Our Uplift Model predicts **influence** (who can be saved).
- We focus budget strictly on the **Persuadables**, maximising efficiency and impact.

What Drives Member Response? Intent vs. Usage.

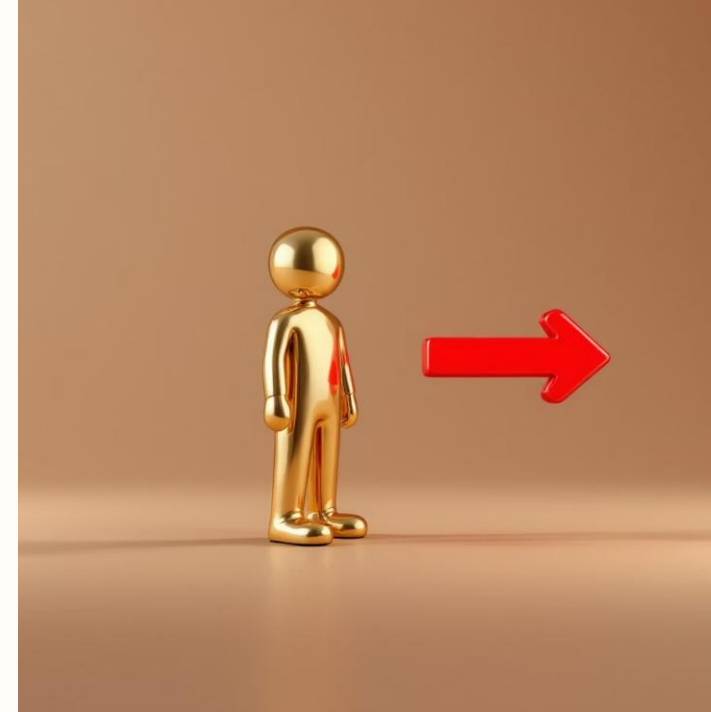


Health Seekers

Users searching "Diabetes," "Nutrition," "Cardio."

[View outreach as Support.](#)

High Response.



Disengaged/Risk

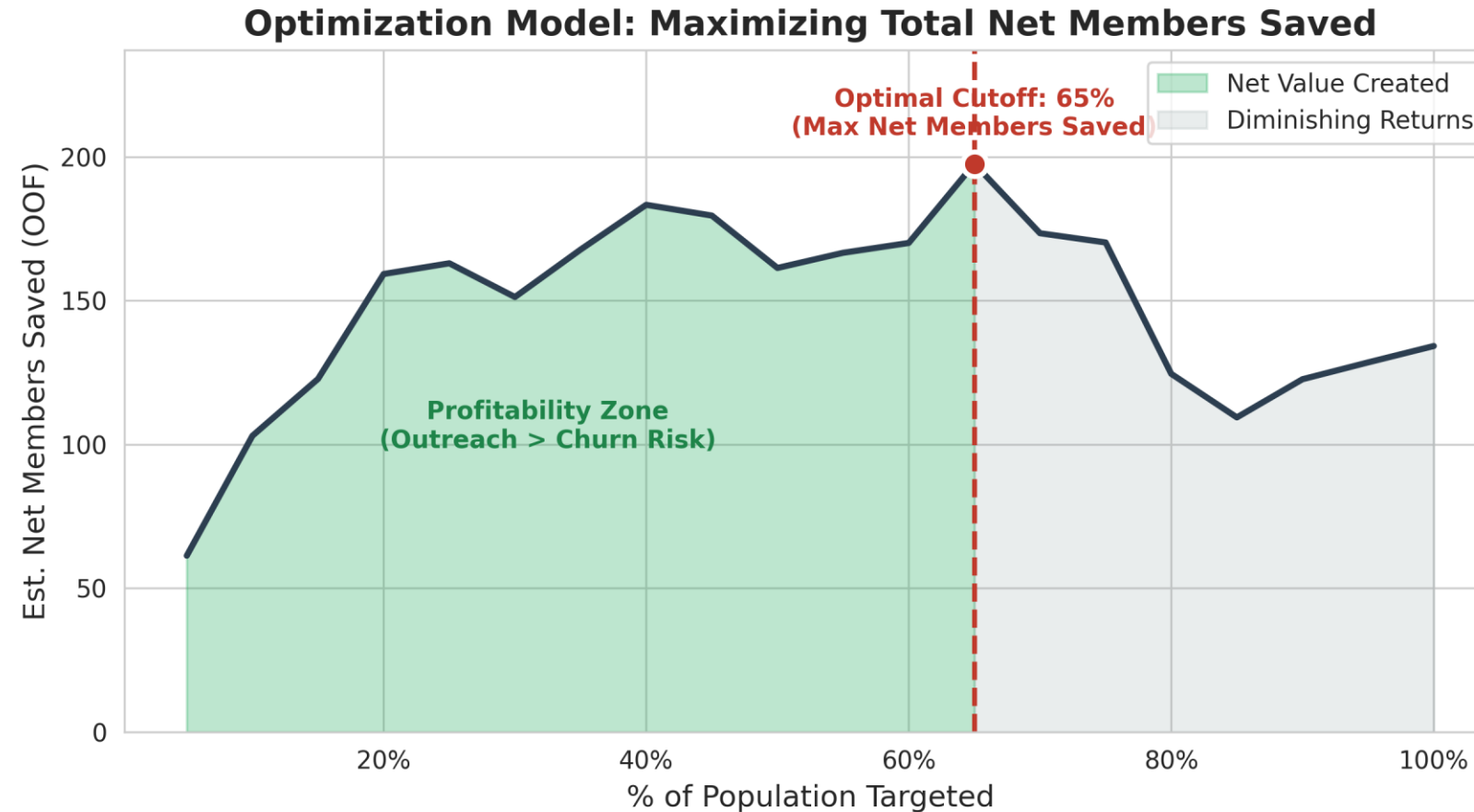
Users searching "Gadgets," "Games," or "Dogs."

[View outreach as Intrusion.](#)

Negative Response.

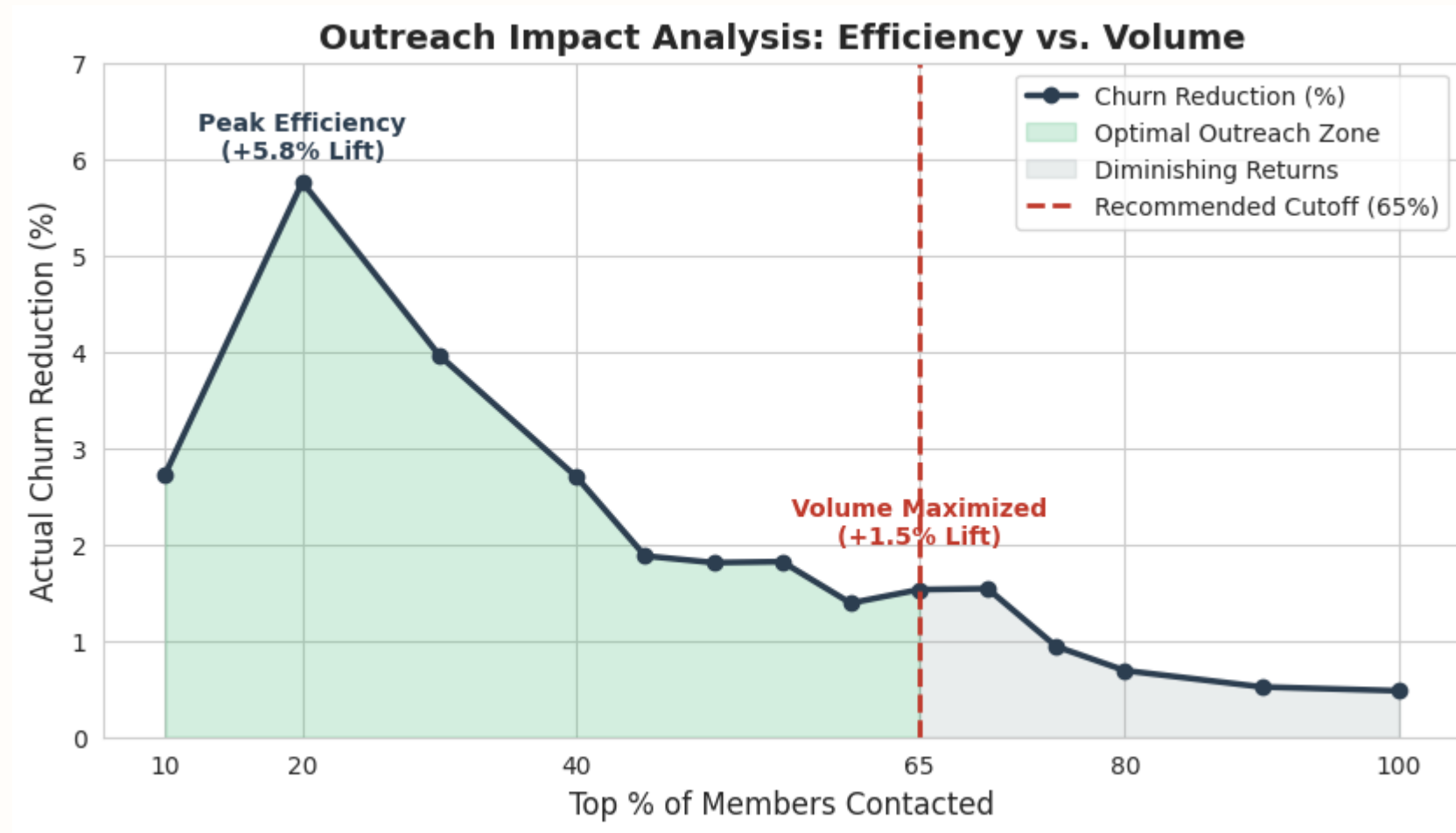
- Analyzing web/app and claims data to decode member **intent**.
- High usage – not always correlate with high risk or positive response.
- Filtering out "Sleeping Dogs" (users researching cancellation) – to avoid triggering faster churn and wasted effort.

Determining the Optimal Outreach Size



- **Objective:** Optimized for Total Net Members Saved (Volume) to leverage marginal outreach costs.
- **The Peak (65%):** Outreach generates cumulative value up to this point, capturing the global maximum of persuadable members.
- **The Decline:** Beyond 65%, the curve drops, proving that further outreach destroys value by triggering "Sleeping Dogs."
- **Decision:** Cutoff set at **65%**, securing maximum impact before the strategy becomes detrimental.

Validated Business Impact



- **Peak Efficiency (Top 20%):** Identified hyper-responsive members where outreach drives a massive **5.8% churn reduction**.
- **Volume Strategy (Top 65%):** Expanding the target list triples the total customers saved while maintaining a **robust >1.5% lift**.
- **The Cutoff:** Impact drops below 1% after the 70% mark; we stop at 65% to maximize volume without hitting diminishing returns.

Ready for Deployment

Our data-driven approach to churn reduction offers a clear path to enhanced member retention and optimised resource allocation. The insights are clear, the strategy is validated, and the impact is measurable.



We are confident this AI-generated outreach list will empower WellCo to achieve its strategic goals, focusing efforts where they matter most and driving sustained growth.