

I'm **on track**
to receive
70% or more
of my income
at retirement

Audience of One[®]

**Improving retirement
readiness for
your participants**

I'm on track to receive \$98,268
I'm diversifying.

I'm on track to receive \$0
I'm enrolling in the plan.

I'm on track to receive \$51,492
I'm saving more.



Evaluation by J.P. Morgan

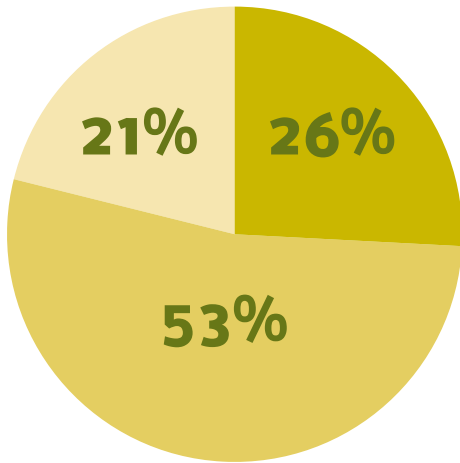


Results

Now we know
how our participants are doing
and
our next steps
as a Plan Sponsor

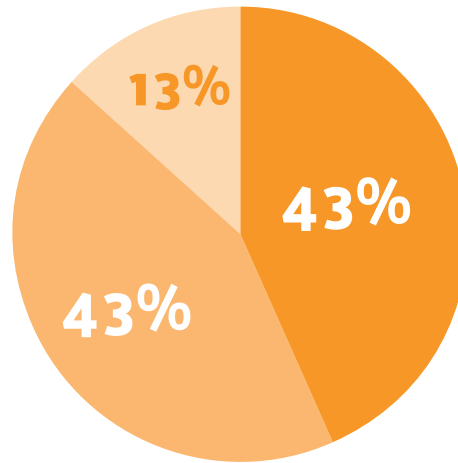


AGE



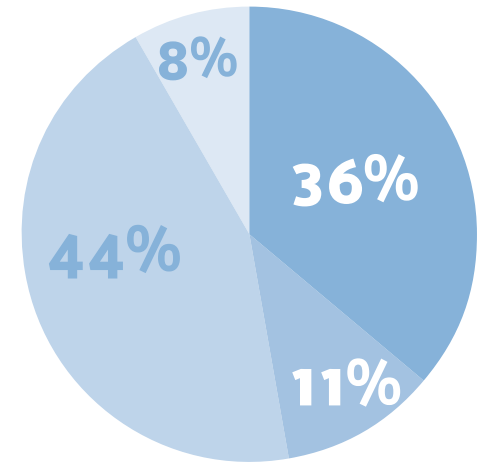
Under 30	Thinks of saving, not retirement.
31-49	Distracted by family and career.
Over 50	Retirement is suddenly tangible.

INCOME



Less than Regional Median	Daily expenses are the top priority.
Median - \$115k	Some confusion on how much to save for retirement vs. health, college and other needs.
\$115k +	May not realize that qualified plan savings and Social Security alone won't achieve minimum levels of

ENGAGEMENT



Active	May be over-managing, particularly with investment selection.
Passive	Benefiting from auto-enroll programs.
Interested	Values the plan but is unsure what to do.
Disengaged	Distracted from the plan by other concerns.

Participant Engagement Report

PLAN INFORMATION

Industry	Pharmaceutical	Total assets	\$665M
Tenure of relationship	1998	Plan type(s)	401(k)
Audience	8,716	Campaign Timeframe	April - June 2013

CONSIDERATIONS

Situation

- Plan offered industry leading design features including automatic enrollment, automatic increase and target date funds, but 3,191 employees were still not saving enough to achieve retirement readiness

Audience Characteristics



Objective

- Drive positive behavior change 7% to 8%
- Deepen engagement among active, passive and disengaged participants

Strategy & Tactics

Deliver personalized and targeted multi-channel program based on specific personas and savings behaviors with direct calls-to-action and streamlined transaction experience

Week:

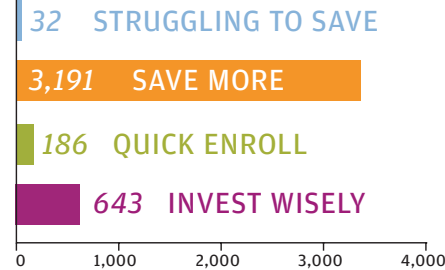


Communications Vehicles



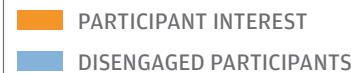
WHO ARE THEY?

MOST NEEDED TO SAVE MORE

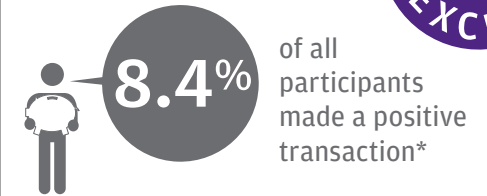


THEY WERE ENGAGED

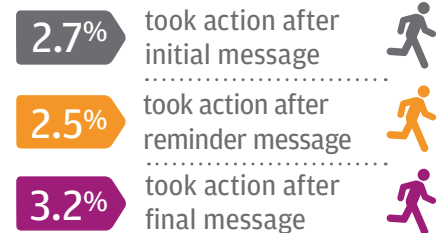
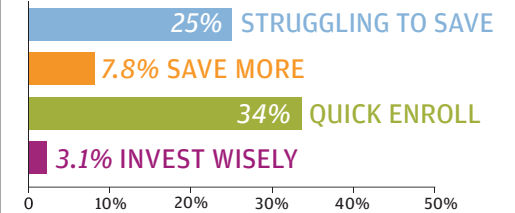
Following the campaign, the plan saw a **27%** increase in participant interest, and **7%** decrease in disengaged participants



WHAT DID THEY DO?



ENROLLING WAS #1



Estimated annual increase in new plan money/contributions:

\$1.2 M

Average annualized contribution increase per participant:

\$3,325

*Enrollment, contribution increase and diversification were considered positive transactions.

BUSINESS-TO-BUSINESS (B2B) COMMUNICATIONS

PROJECTS:

Information Graphics

AUDIENCE:

Existing Business Partners
Prospects

ROLES:

Strategic Consultant
Data Analyst
Content Developer
Art Director
Designer

TOOLS USED:

Adobe Illustrator
Microsoft PowerPoint

NOTES

These PowerPoint sales templates were designed to accomplish three goals:

- 1) Interpret complex concepts around our product offering,
- 2) Offer visual reporting of communications results, and
- 2) Be self-service and fully editable by end users per client need.

By working with product owners to identify key data points and messaging, I created simplified graphics to easily demonstrate complex concepts and designed easily editable templates that could be tailored to existing clients and prospects without requiring design resources. Messages reflected corporate positioning as well as reporting statistics.