

# Reimagine the participant experience for a digital world

Broadridge Retirement CX helps you deliver targeted and relevant communications to engage and educate retirement plan participants.

Your business depends on digital marketing—from automation to analytics to dissemination—for cost efficiency and predictable customer experiences. Broadridge Retirement CX is the leading end-to-end digital marketing solution for retirement providers. Integrating data, content and business rules with the latest in marketing automation technology and analytics, Retirement CX enables you to manage thousands of plan sponsor brands and provide each participant with a personal digital experience.

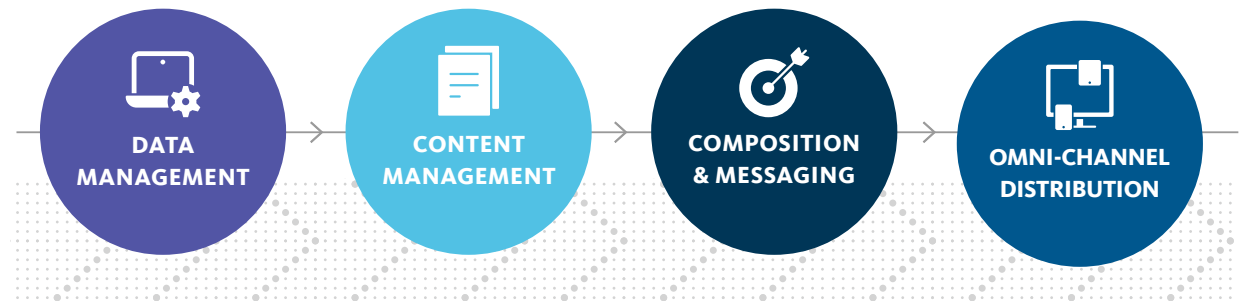
## A COMPREHENSIVE SUITE OF COMMUNICATION SOLUTIONS FROM A SINGLE INTERFACE

The Retirement CX powerful API-based platform is extensible, customizable and scalable, integrating data, content and business rules for customization across diverse models and markets. This innovative solution helps increase operational efficiencies and lower costs.

- Deliver dynamic personal digital experiences across web, email, SMS and mobile.
- Add business insights to drive growth.
- Gain cost efficiency and outcome predictability.
- Access agile tools for continuous improvement.

## A fully integrated suite of communication services

Improve the participant experience while streamlining costs and reducing complex administration. Broadridge manages the full lifecycle of plan communications, saving you time and money.



Retirement CX: Built to serve the distinct needs of retirement and workplace benefit providers.

# Retirement CX—A transformative, end-to-end digital marketing solution



From enrollment to retirement, automate personalized content and journeys with adaptive workflows using multi-channel touchpoints. Design participant journey maps at scale, focusing on delivering the right information, in the right amount, at the right time.

## Core areas of expertise include:

- Data management
- Content management and business rules
- Brand and communication management
- Journey management
- Digital asset management
- Dynamic digital experiences (web, email, SMS, mobile)
- Marketing analytics
- Sponsor metrics
- Personalization engine
- Extensible, API-based platform

### IMPROVED CUSTOMER EXPERIENCES

Improve the participant experience while streamlining costs and reducing complex administration. Broadridge manages the full lifecycle of plan communications with the speed and automation of digital transformation.

### ENGAGING DIGITAL EXPERIENCES

Dynamic digital experiences via web, email, SMS and mobile channels maximize engagement, allowing you to take advantage of digital regulatory events and meet customers in the channels they prefer.

- Personalization engine—personalization increases engagement and improves the experience.
- Extensible, API-based platform—real-time data exchange and ease of onboarding.
- Marketing analytics and sponsor metrics—insights to drive business results.

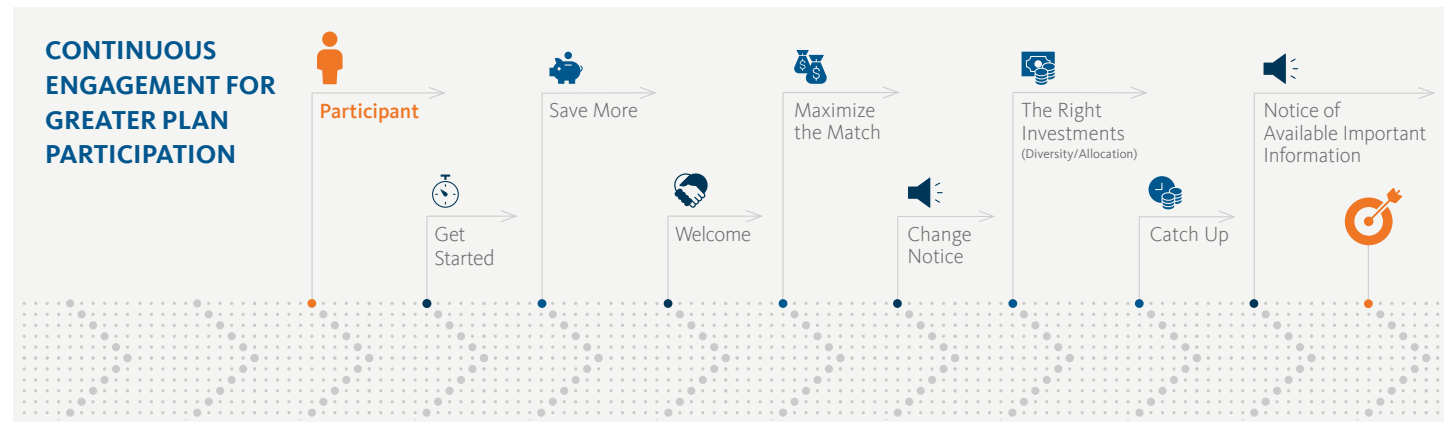
### INSIGHTFUL DATA AND ANALYTICS

Know where participants stand with customizable reporting and metrics. Retirement CX uses advanced integrated analytics to provide real-time insights that drive decisions and provide value-oriented metrics.

- Report suites—customizable reporting and metrics for each participant journey.
- Analytics dashboards—track, measure and analyze recipient behavior and journey results.

**Improve any type of retirement communication**

- Enrollment communications
- Statements
- Regulatory notices
- Targeted marketing campaigns
- Rollover communications
- Digital communications



## DISCOVER HOW YOU CAN TRANSFORM PARTICIPANT EXPERIENCES WITH RETIREMENT CX

Contact your Account Representative, email us at [RetirementCX@broadridge.com](mailto:RetirementCX@broadridge.com) or visit us online.

[broadridge.com](http://broadridge.com)



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Technology  
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