

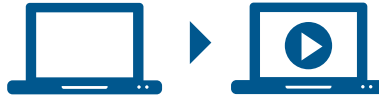
The Transformation of Retirement Engagement

Go from COMMUNICATIONS... to EXPERIENCES

COMMUNICATIONS

EXPERIENCES

WEBINARS
long presentations | Q&A



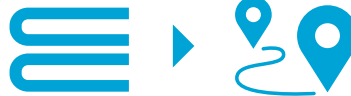
ANIMATED VIGNETTES
short clips | situations/guidance

PROVIDER WEBSITE CONTENT
static libraries | videos and tools



CONNECTED MOMENTS
interactive conversations | multiple channels

ENROLLMENT BOOKS
1 size fits all | overview saving plan



JOINING EXPERIENCES
personal design | hire through enroll

LIFE STAGE PROGRAMS
age-based | traditional patterns



LIFE EVENT SUPPORT
help/support | life events | any age

TARGETED CAMPAIGNS
periodic topics | specific groups



TRIGGER-BASED OUTREACH
in-the-moment | relevant info

STATEMENTS & CONFIRMS
static facts | accounts/transactions



PERSONALIZED GUIDANCE
on-demand | insight/guidance

NOTICES AND DISCLOSURES
standard info print | e-delivery



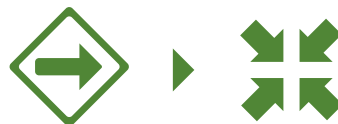
HELP AND GUIDANCE
plain language | required info

FUND CHANGES
standard notices print | e-delivery



INVESTMENT INTERACTIONS
personalized next-step guidance

ACCOUNT ACCESS
1-way action | phone/web/mobile



MULTI-CHANNEL JOURNEY
interactive | integrated | high-impact

DEMOS
simple views | various screens



JOURNEY MAPS
visual map | likely interactions

SATISFACTION SURVEYS
survey | satisfaction of interaction



EMPATHY MAPS
research-based | customer persona

LEARN MORE ABOUT THE EXPERIENCE REVOLUTION.

Download the full report at Broadridge.com/CXRevolution