

PROTEUS
ADVISORY SERVICES

Guidance you can trust

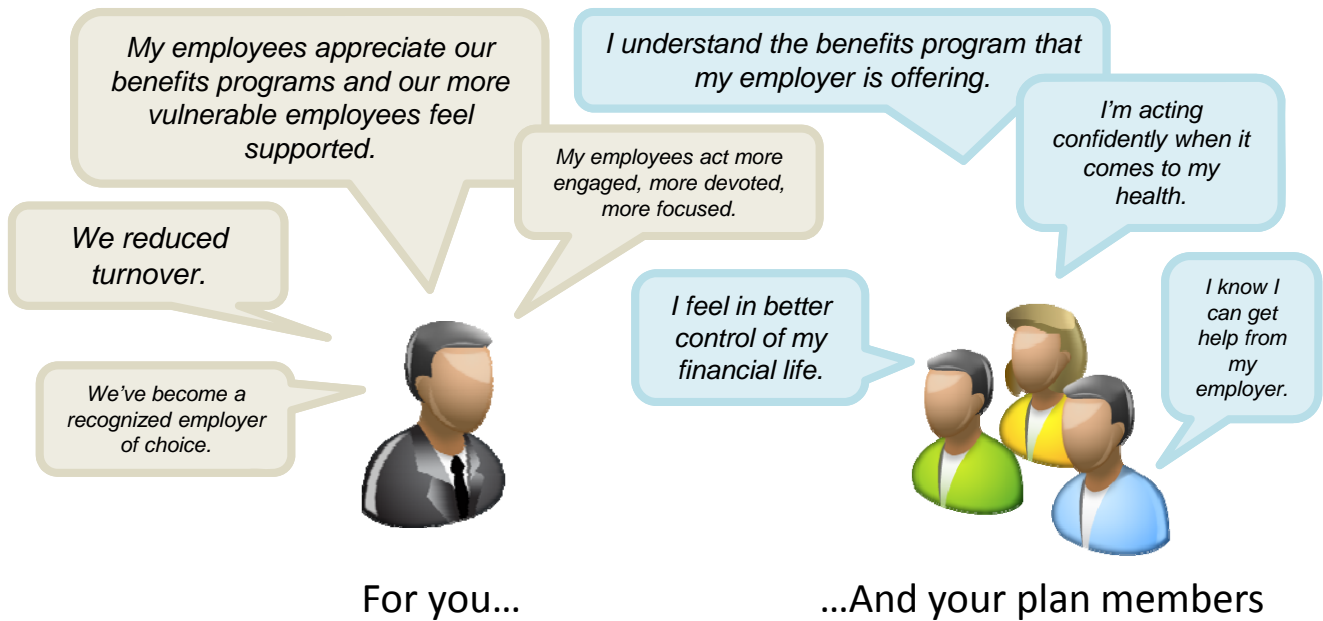


Build. Inspire. Achieve.

Re-engineering the communication complex of group retirement benefit to enhance engagement (Content)

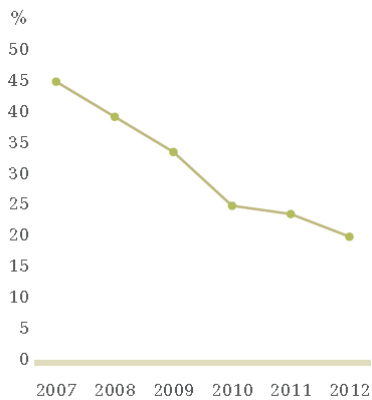
250 Ferrand Drive, Suite 303, Toronto, ON M3C 3G8
Tel: 416 421-3557 or 1-877-360-6363
www.proteusadvisory.com

Engage your plan members and achieve your true potential.



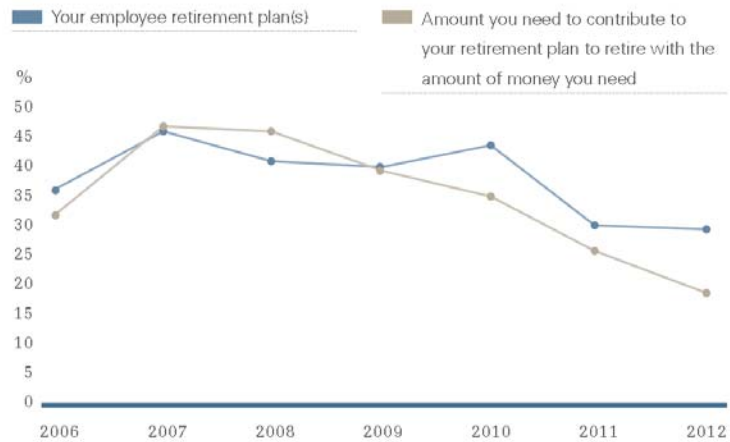
Do you have a formal, written financial plan that outlines at what age you will retire and the amount of money you will need to retire by that age?

Percentage of respondents who answered yes



Would you say your understanding is excellent, very good, somewhat good, somewhat poor, very poor or you have no understanding of...

Excellent/Very Good (NET)



Source: Benefits Canada Survey of CAP Members , November 2012

Despite all the efforts, plan members are disengaging.

We know that the complexity inherent to investing can prevent plan members from making important retirement planning decisions. But it seems that plan members have never been so disconnected from their pension obligations. Their pension problems are your problems: you need to help them fight inertia and engage them in one of the most vital and inevitable aspects of their life.

It's up to you now
to provide your employees with the education and support they need and want. *Status quo* is not an option.



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90%

of consumers worldwide want to become better at managing money

(ING Group, International Consumer Resourcefulness Study)

75%

of employers mentioned that "where to invest" was the most FAQ from plan members

(Deloitte and the International Society of Certified Employee Benefit Specialists, survey)

245%

Retirement plans of people who engaged in financial planning grew on average 245% more than people who did not engage in planning.

(HSBC, 2011, the Future of Retirement)

58%

of employees in the U.S. would like their employer to provide access to financial planners.

(MetLife, 8th annual study of employee benefits trends)

44%

of employers mentioned that "how much to save for retirement" was confusing to plan members

(Deloitte and the International Society of Certified Employee Benefit Specialists, survey)



"Thinking of all aspects of my finances, I am satisfied with my situation today"

Younger than 40

36%

Towers Watson Retirement Attitudes Survey, 2012)

Age 40-49

29%

Towers Watson Retirement Attitudes Survey, 2012)

Age 50+

24%

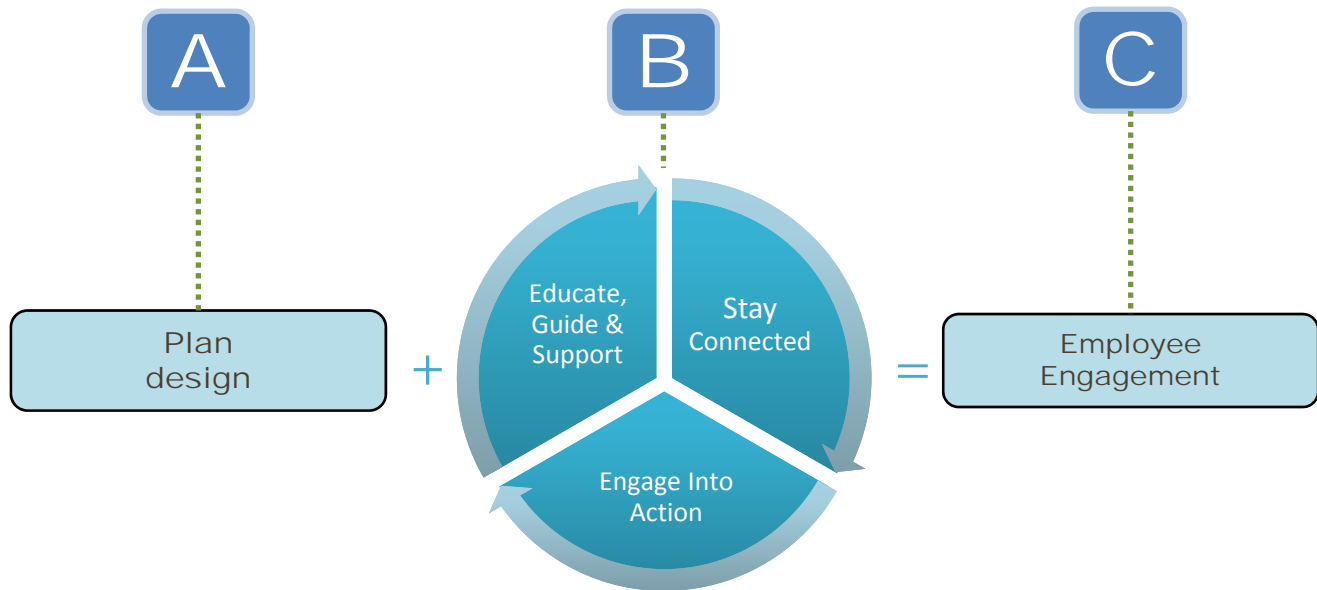
Towers Watson Retirement Attitudes Survey, 2012)



Re-engineering the communication complex of group retirement benefit to enhance engagement (content).

Plan member engagement is finally getting the attention it deserves.

The quest for engagement will fundamentally change the pension delivery.



By delivering content that is vital and relevant to your plan members, you will begin to take on an important role in their lives. Don't fool yourself: effectively communicating to your plan members has more to do with marketing and selling than trying to educate them. How do you achieve that? Your member solution rests on the creation and sharing of relevant content for the purpose of solving a problem and reinforcing your brand messaging as the plan sponsor through thought leadership. It's about telling a story that matters.

Everything you communicate with plan members must have a purpose. Deliver information that your members need to succeed. For content – i.e. support and education – to be effective and successful, it must follow six rules:

- It's not promotional
- It's well written
- It closes a gap
- It gives proof
- It's in line with your vision
- It's relevant

Think and act like a publisher!

1 **Secure executive sponsorship**

Results will not be instantaneous. Think about the length of the education cycles and campaigns.

2 **Understand your audience**

Content marketing is the art of understanding exactly what your members need to know and delivering it to them in a relevant and compelling way to grow appreciation, engagement and return on the pension benefit you offer.

3 **Create an editorial calendar**

This is our execution plan. This overview provides the opportunity to determine how to integrate everything into a cohesive story for execution, and how to connect the dots. This calendar should enumerate the constant, member-centric themes we want them to see. Cadence is critical.

4 **Develop a process for measuring and reporting**

A content strategy is a long-term approach that will gain momentum over time. This is where we must develop our KPIs and present a process for measuring and reporting on progress that's tied to creating value to the members.

5 **Develop an array of content across multiple channels**

Every plan member has a preferred method of learning, and each generation has distinct communication preferences. Deploy content through a variety of communication channels in an effort to maximize engagement. As such, the Proteus-powered retirement planning and investment website for plan members fulfills the immediate need of establishing a digital presence.

Overcome poorly engaged employees and unlock your plan into the powerful HR tool it's meant to be.