

# Creating positive change – together

## Scenario: The Challenge

Helping employees save for the future isn't just a nice step for one university hospital, it's an essential effort that can't be ignored. Employees depend on this client—and Corebridge—to help them not only understand the need to invest for retirement, but to provide the education, tools and resources to help achieve this important goal.

Still, 2021 was a difficult year for many healthcare workers who dealt with the pandemic face-to-face each day and also experienced the impact of a volatile market on their financial future. With this in mind, Corebridge and the client worked together in 2021 to develop a multi-pronged Communication and Education campaign to raise awareness and motivate action.

## Approach: The Solution

The client and Corebridge knew it was critical to help participants navigate these unprecedented times with a communication and education strategy that reinforced the importance of saving for the future, even when the future was uncertain.

Our teams worked together to set a goal that provided educational content to drive plan contributions, beneficiary designations, workshop attendance and meetings with financial professionals.

Corebridge began a multitouch and multichannel campaign using emails, webinars and phone calls to deliver important messages on key topics that would drive to the overall plan goals.



## CASE STUDY

### January – New Year’s resolution

The year-long campaign kicked off in January with a New Year’s Resolution email that offered recipients resolution options aimed at helping them create a more secure financial future.

### February – Importance of saving

During America Saves Week in February, we distributed multiple targeted emails focused on relevant educational content that encouraged employees to take action to enroll, increase contributions or meet with one of our onsite financial professionals.

### March – Milestones

Personalized messages highlighted the importance of goal setting and encouraged participants to meet with their financial professional to set future goals.

### April – Financial literacy

April is National Financial Capabilities Month! With a full month of multichannel messaging, this campaign aimed to increase financial literacy and wellness as well as drive employee engagement.

### June – Mid-year checkup

Emails targeted active participants with the goal of motivating them to take action in regard to their retirement account. The checklist featured six action items and informed participants of the items they had completed while providing a call to action of items they had yet to complete.

### July – Importance of diversification

Emails targeted active participants with the goal of motivating them to meet with their financial professional to discuss the importance of diversification within their retirement plan.

### August – Manage your account

Emails provided participants with tips to help them maximize their retirement account online.

### September – Lifetime income

Emails encouraged participants to engage with their financial professional to learn more about lifetime income options and the role life insurance can play in protecting their retirement income strategy.

### October – Save more

A weekly email series during October focused on things participants could do to enhance their retirement savings through each of the stages of their career.

### December – Thank you!

Holiday messaging and video thanked participants for another year of working together, wished them a wonderful holiday season, and encouraged them to plan ahead for the upcoming year.

## The power of personal interactions even when they’re virtual

In addition to the multipronged Communication and Education campaign, we also emphasized the importance of meeting with a financial professional. Even though COVID made it difficult for employees to meet in person, our team of professionals was available to meet virtually. With this in mind, they continued to proactively reach out to new employees to encourage them to enroll in the plan. They also reached out to retirees to offer account reviews and host monthly educational workshops.

Why the meetings were important:

- 130 advisor assisted enrollments
- 1,019 annual reviews
- 302 financial planning meetings
- 380 retiree review meetings

## The Results

### Individual meetings:

- 272 contribution increases
- 983 beneficiary updates
- 13 employee beneficiaries were assisted with death claims, helping them through the process

### The financial professional team also assisted:

- 3,142 participants via phone appointments
- 2,088+ emails from employees answered
- Educational workshops:
  - 12 workshops with 184 attendees
  - 54% engagement with active employees; increase of 14% from the 3Q
  - 72% overall engagement; increase of 8% for overall engagement from the 3Q

## What's Next?

Going forward, Corebridge will continue to work with the client to evaluate engagement and enrollment and implement additional strategies if necessary. Driving positive action is our priority.

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