

Strategic communication and education plan improves participant outcomes

Scenario

Corebridge Financial met with a government client to discuss priorities, goals and needs regarding effective ways to educate and inform employees about its defined contribution retirement plan.

The discovery meetings laid the foundation for a successful strategic communication and education plan, which launched in 2025 and will continue annually.

Working together, we focused on energizing employees to engage with their retirement plan.

Approach

The following strategic communication and education goals were formed:

- Educate and welcome newly hired employees
- Engage participants to restart / increase / maximize contributions
- Target non-savers to drive enrollment and plan awareness
- Inform terminated and retired participants about distribution options and highlight the benefits of keeping money in the plan
- Educate participants about consolidating their account balances from other retirement plans into the defined contribution retirement plan
- Increase engagement with the Corebridge financial professional team

Driving engagement

We rolled out a multitouch and multichannel campaign using emails, webinars and direct mail to deliver important messages on key topics — enrolling in the plan, increasing contributions, adding the Roth feature and reviewing distribution options.

CASE STUDY

Key Results

New hire campaign

- Sent emails and letters to newly hired employees
- Focused on enrolling in the plan and resources to engage with a financial professional for assistance
- 39% unique open rate
- 2,530 employees enrolled in 2025

Restart and increase savings campaign

- Sent emails to participants who stopped contributing, encouraging them to restart
 - 45% unique open rate
- Sent email to participants who were eligible for pay raise to increase contributions
 - 38% unique open rate with 825 deferral rate increases

Terminated and retired participants education campaign

- Sent emails and letters to terminated and retired participants
- Focused on reviewing plan options and encouraging them to keep their money in the plan
- 39% unique open rate

Educate participants about consolidating their retirement plans with Corebridge

- Delivered targeted communications through emails, letters, statement messages and outbound phone calls to educate participants about retirement plan consolidation
- 54% unique open rate
- 182 participants rolled over their account balances from multiple plans into the defined contribution retirement plan, totaling \$1.1 million

Increase engagement with the Corebridge financial professional team

- Developed a video introducing our local financial professionals who provide educational support through the defined contribution retirement plan
- Created and sent emails with instructions on how to schedule one-on-one appointments
- Delivered 36 webinars educating employees about the defined contribution retirement plan, Social Security, the client's pension plans, family longevity planning and managing life in retirement

Data is as of 12/31/2025.

What's Next?

The campaign effectively communicated the importance of a secure future, motivating employees to take action. Corebridge continues to partner with the client to analyze employee data, identify opportunities to target groups of employees and increase levels of engagement that can lead to improved participant outcomes into the future.

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