

Participant Communications

Next Generation Participants Expect Next Generation Digital Tools

Growing numbers of plan participants no longer respond to conventional plan communications. They are looking for an online experience that mirrors how they consume information and take action in other areas of their lives. The shift to digitalization is demanding a shift in mindset and tactics by retirement service providers. Firms that proactively get ahead of this challenge with innovative technologies that enable both consistency and creativity in communications will differentiate themselves and lead the next generation of retirement planning. We can help you maximize the new opportunities available in the retirement space through digital campaigns, content, and customization that support your long-term participant communications objectives with more impact and less cost than traditional solutions.

High-impact Communications

Today's digitally savvy generation wants relevant, personalized information and tools at their fingertips. The old ways of communicating with them just don't work anymore. That's why we built a full suite of multi-channel communications that speak to participants on an individual level, connect with them emotionally, and move them to take concrete action.

Tools and Touch Points

A truly effective participant communications program is a holistic, continuous process that incorporates numerous strategies, tools, and touchpoints from enrollment through accumulation and ultimately exiting the plan. Leveraging technology to make meaningful connections with participants at each stage of their participant journey, enveloping them with support wherever and whenever they need it, is a key component of our approach.

Driving Participation

We offer a multi-channel enrollment experience that simplifies the enrollment process. Digital tools enable targeted, measurable campaigns that can link directly to enrollment content for a more efficient enrollment experience for both participants and plan sponsors.

Responsive-design mobile enrollment tools and personalized plan-level enrollment content reinforce the importance of plan participation and encourage employees to take action.

SS&C is committed to aligning with our clients' digital strategies and staying ahead of the technology curve for all participant communications from enrollment to distribution.

Ongoing Personalized Engagement

We can also execute a more comprehensive, ongoing communications program through our Personalized Financial Wellness Center. The Center allows you to select the modules that matter most to your business. Designed with a modular framework, you can configure the Center to meet your branding guidelines, compliance requirements, and system integration standards.

The Center's robust, configurable solutions are made possible by a combination of our agile development capabilities and a vast financial library. The Center has more than 3,000 articles and hundreds of tools, videos, charts, and calculators for shaping compelling user experiences across virtually any financial topic, life stage, or learning style. No matter which modules you select, participants have the tools necessary to prepare for retirement, improve their outcomes – and ultimately increase their AUM (assets under management).

Clients can augment a digital enrollment campaign with the Center by directing eligible employees to a custom-branded microsite where enrollment content, education, and relevant calls-to-action are woven together in a dynamic, personalized interface that will be visited even outside of enrollment periods, keeping retirement planning top-of-mind.

Keeping Up With Compliance

Complying with the numerous rules and regulations issued by the Department of Labor, the IRS, and other regulators tasked with overseeing the operations of retirement plans is a significant challenge for plan sponsors. From safe harbor notices to fund change notices to QDIA notices, our compliance communications are one way you can help plan sponsors meet the challenge.

Aligning Digital with Print

We understand the role that print communications still play in some elements of our clients' plan participant communications programs. While we do not supply print options ourselves, we make print-compatible objects and full print files available for processing and distribution through a third party print vendor of your choice.

The Future of Participant Communications

SS&C is committed to continuous innovation in the retirement space. As the premier provider of participant communications, we're developing exciting digital resources that support both creativity and operational efficiency in communications that result in a better participant experience and competitive advantage for our clients.