Plan health dashboard

Optimize plan performance through better information and insights

There's more to measuring the success of a retirement plan than looking at the number of plan participants and the plan's total investment assets. The true measure of a retirement plan's success is how well the plan is preparing participants for retirement.

But how do you identify the specific data needed to perform that measurement and use the data to help plan sponsors make better decisions about their retirement plan?

We offer an array of data-driven insights and retirement analytics solutions.

Retirement Intelligence Analytics Suite

- Understand your customers with success measures and Key Performance Insights
- Engage with segmentation and categorization
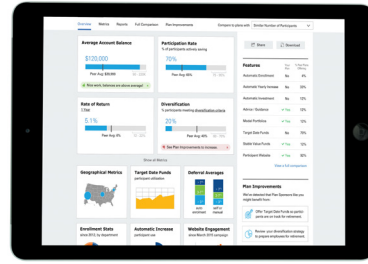- Drive action with targeted recommendations and key drivers

The Plan Health Dashboard enables access to real-time plan data online and through mobile devices.
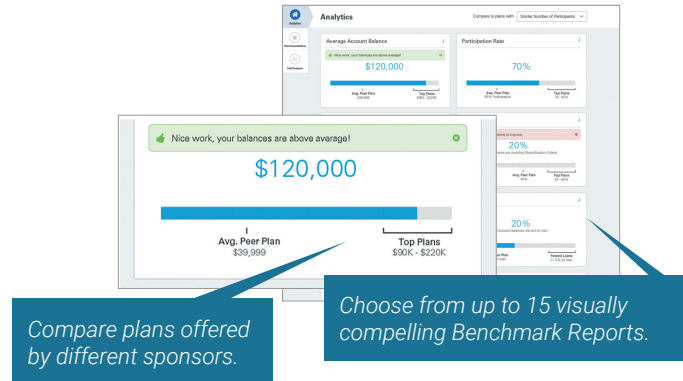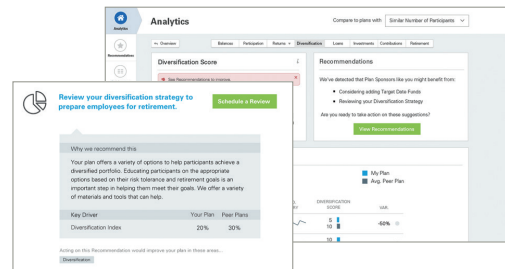
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A dashboard with single sign-on access to online plan progress reports, plan health benchmarking, benchmark reports, predictive models, and more.

Key performance insights to integrate the information most critical to plan sponsors with analytics to give insightful knowledge about plans and to recommend actions to improve plan performance.

Compare plans offered by different sponsors.

Choose from up to 15 visually compelling Benchmark Reports.

A recommendation that seamlessly compares plans against peer groups across a range of key plan and performance dimensions. From this information, the engine identifies areas for improvement based on the characteristics of high-performing peers.

Categorize, segment score provides enhanced plan, participant, and advisor profile data to support peer comparison, opportunity ranking, and targeted marketing and communications.

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