

MARCOM CX

THE CUSTOMER EXPERIENCE MANAGEMENT PLATFORM



## Transform the Way You Manage Participant Experiences

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Maximize engagement, participation and satisfaction

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Deliver personalized, omni-channel experiences

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Streamline content and campaign creation

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Use data to create personalized experiences

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Ensure brand consistency and compliance

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*The MarCom CX platform makes it easier to turn your participant engagement strategy into a reality.*

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### Streamline participant engagement with one integrated technology platform

Plan sponsors, advisors and participants expect retirement providers to deliver engaging, relevant information at every stage, from enrollment through rollover or distribution. They want fast, personalized interactions via the channels they choose. Many plan providers simply do not have the right platform to deliver this kind of experience in a cost-effective manner.

It's time for a more agile, efficient approach to plan communications. MarCom CX, the Customer Experience Management Platform, makes ongoing, personalized engagement easy, while maintaining control and reducing costs.

### Follow the CODE

The "Create Once, Distribute Everywhere" (CODE) model uses one data and rules engine that can be leveraged across all channels to personalize content. This streamlines repetitive work and saves time. The cutting-edge platform features flexible templates, access to data feeds for personalization and efficient distribution. Built-in business rules extend persona-based messaging—without the need for IT support.

### Motivate participants to take the next best step

Gain a holistic view of participant engagement that enables seamless, integrated conversations across channels. Users can customize content at the plan level, personalize messaging for each individual and enhance engagement throughout the entire lifecycle to:

- Increase enrollment
- Improve financial wellness
- Fulfill regulatory obligations
- Drive better outcomes

## An improved experience for providers and participants

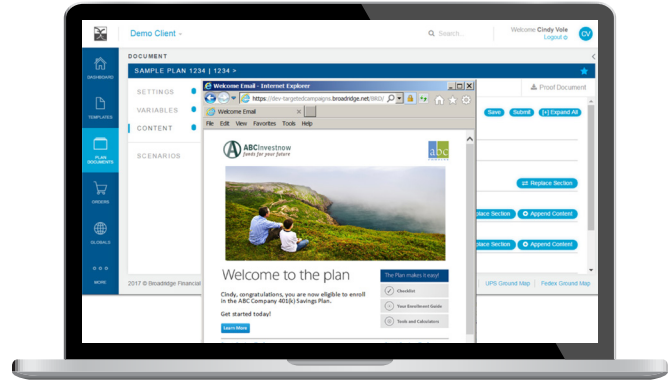
Broadridge built the MarCom CX platform to serve the distinct needs of retirement providers. The secure, cloud-based platform provides the tools to quickly change plan documents, personalize communications and drive better participant outcomes.

## A seamless, scalable platform

Control the complete communications process with a scalable web-based solution. A content management hub centralizes data and content management, letting users apply distinct business rules as needed, then linking to seamless demand distribution across print and digital channels. This highly sensitive information is safeguarded by the highest level of technology available, leveraging Broadridge's select ISO 27001 certification.

## An efficient, intuitive user interface

Users will appreciate the streamlined interface, designed in accordance with industry best practices, feedback from clients and a usability working group to provide a consistent, intuitive user experience.



Convenient features include wizards that simplify template creation and a user dashboard that makes it easy to manage tasks and track results.

## An ongoing, holistic process

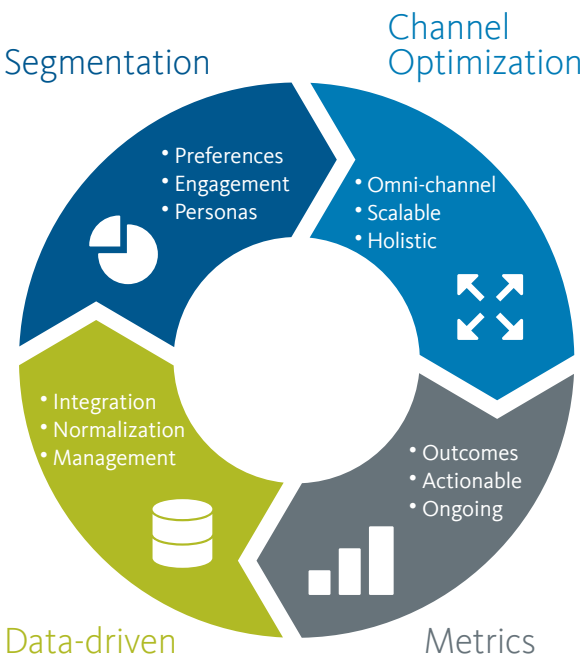
Provide personal, relevant information at every touchpoint across the participant journey from enrollment to retirement and beyond.

- **Improve segmentation:** Accurately target messaging to different segments that have specific needs and expectations, such as Baby Boomers versus Millennials.
- **Optimize delivery channels:** Cost-effectively deliver communications geared to individual preferences.
- **Use metrics to drive better outcomes:** Help participants understand if they are on track to meet their retirement goals. Analyze for actionable insights for ongoing improvement.
- **Gain data-driven insight:** Enhance the accuracy and comprehensiveness of plan and participant data.

## Learn more

Discover how easy it can be to engage plan participants with more meaningful, motivational experiences. Call +1 800 353 0103 or visit our Retirement Communications Resource Center at [broadridge.com/rrc](https://broadridge.com/rrc).

Improve participant experiences through a continuous cycle of using data, leveraging content, studying metrics and applying learnings.



## About Broadridge

Broadridge, a global fintech leader with over \$7 billion in market capitalization, provides communications, technology, data and analytics solutions. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.