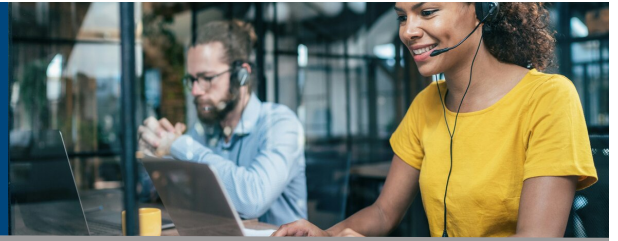


CASE STUDY

Upgrading Service for a Better Employee Experience



AT A GLANCE

Challenges

- Lack of personalized support
- Accessibility for employees

Our Solution

- Enhanced Service & Advisor Support
- Multi-lingual & phone-based assistance

BACKGROUND

A client approached us with concerns about the quality of service they were receiving for their retirement plan. They struggled to get timely support and had no direct relationship with an advisor to help navigate plan issues. Additionally, many of their employees did not speak English as a primary language and were not comfortable using technology to check their retirement balances.

CHALLENGES

The client faced two primary obstacles:

- Lack of personalized support: The existing platform offered minimal service, forcing the employer to spend excessive time resolving plan issues.
- Accessibility for employees: Many employees required multi-lingual support and non-digital solutions to access and manage their retirement savings.

OUR SOLUTION

To address these challenges, we implemented the following solutions:

- Enhanced service & advisor support: We transitioned them to a platform with a larger, more responsive service team. Our team also took over as their advisor, becoming the primary point of contact. This eliminated the need for the client to rely on a generic 1-800 number, allowing them to focus more on their business.
- Multi-lingual & phone-based assistance: The new platform offered multi-lingual support and provided phone-based assistance, ensuring employees could receive help in their preferred language without relying on apps or computers.

RESULTS

By upgrading to a platform with enhanced service and multilingual support, the client now has:

- A dedicated advisory team to assist with plan-related issues.
- A service provider that meets employee needs through phone-based, multi-lingual support.
- More time to focus on their business rather than troubleshooting retirement plan problems.

Meet the team

Our team is here to deliver personalized advice and services to help you achieve your financial goals, today and tomorrow.

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