

INTRODUCING THE RETIREMENT PLAN PARTICIPANT EXPERIENCE BENCHMARK

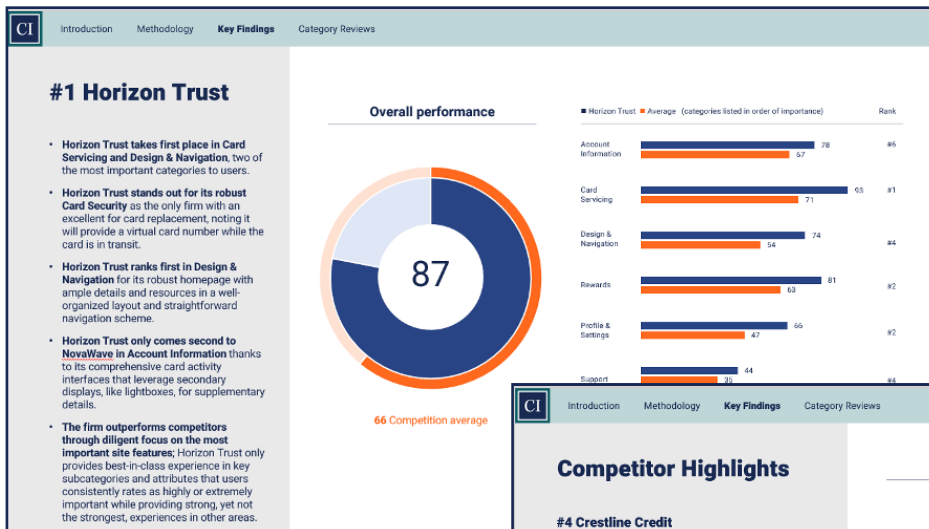


Competitive insights to shape your digital future

Corporate Insight's Retirement Plan Participant Experience Benchmark is the only annual study that provides an unbiased assessment of 18 leading defined contribution (DC) retirement plan participant websites and mobile apps from the perspective of the actual end user. Our proprietary grading criteria and analytical framework are based on over a decade of research in this space, giving you a clear view of how the nation's top DC plan recordkeepers' digital platforms stack up against each other in terms of design, navigation, functionality and usability. With this definitive guide to the best retirement plan participant digital platforms, you receive:

- Rankings of 18 leading retirement plan participant websites and mobile apps
- Identification of leading players in every category
- Insights into best-in-class digital experiences, with illustrative screenshots
- Analysis of your top digital strengths and weaknesses versus the industry
- Areas of focus to prioritize in your digital development

The Retirement Plan Participant Experience Benchmark is a must-have resource for any DC plan recordkeeper that wants to create a digital experience that delights current participants and helps to win new retirement plan business.



Spotlight review on top performer



Summary highlights of each competitor

The Experience Benchmarks address several pain points for DC plan recordkeepers:

PROBLEM	SOLUTION
"We want to know how to position our strengths versus peers in the marketplace"	CI's Experience Benchmarks will objectively show where your strengths are relative to the competition
"Fighting for budget is always a challenge – we need objective data to build the case for investment"	Benchmarks provide tangible evidence of your competitive gaps
"It's hard to set priorities when we don't know the size & importance of our gaps, and where things are going"	Our data is weighted to reflect cardholder importance/usage; analysis calls out key industry trends
"We need KPIs to see if what we're doing is really moving the needle"	Each firm receives overall and category scores; annual data refresh lets you track your progress over time
"Our competitors are getting higher satisfaction scores for digital than us and we're unsure how to respond"	Benchmarks reveal competitors' strengths & provide recommendations to improve your digital CX

Retirement Plan Participant Experience Benchmark Framework

CI analysts evaluate six categories to separately assess the website and mobile platforms:



Account Information



Profile & Settings



Transactions



Design & Navigation



Planning & Research



Support

Benchmark Competitive Set

- Alight Solutions
- American Funds
- Charles Schwab
- Corebridge Financial
- CUNA Mutual Group
- Empower
- Equitable
- Fidelity
- John Hancock
- Lincoln Financial Group
- Merrill
- Nationwide
- Principal
- T. Rowe Price
- TIAA
- Transamerica Retirement
- Vanguard
- Voya Financial



For more information on the Retirement Plan Participant Experience Benchmark including our Custom Experience Benchmarking option, contact us:
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