Broadridge®

Reimagine the participant experience

Broadridge MarCom CX automates targeted retirement communications to engage, alert, and educate participants

Manage thousands of personalized touchpoints and journeys using sophisticated automation. MarCom CX integrates data, content, and business rules into a holistic view that empowers you to increase efficiencies and improve the participant experience. Reduce manual efforts and let our end-to-end platform deliver the right message at the right time — every time.

One interface. Every communication.

Real-time APIs connect applications and data across the entire retirement lifecycle. Use extensible, customizable, and scalable tools to create relevant outreach for diverse models and markets.

- Deliver dynamic digital and print communications
- Leverage business insights to drive growth
- Gain cost efficiency and outcome predictability
- Access agile tools for continuous improvement

Eliminate manual composition.

Quickly compose complex communications with flexible data integration. Connect to any source and automate time-consuming tasks, reducing manual errors and freeing up resources for other important functions.

Enhance every touchpoint.

- Enrollment journey management
- Retirement lifecycle communications
- Targeted or nudge campaigns
- Regulatory notices and disclosures
- Rollover communications
- Account statements

Maximize engagement and efficiency with print and digital optimization

Simplify retirement communication administration so you can focus resources on strategic initiatives. Broadridge MarCom CX manages every correspondence across the full lifecycle of plan communications, while streamlining costs and reducing complex administration.

Data management

Omni-channel distribution

Broadridge MarCom CX

Content management

Composition and messaging
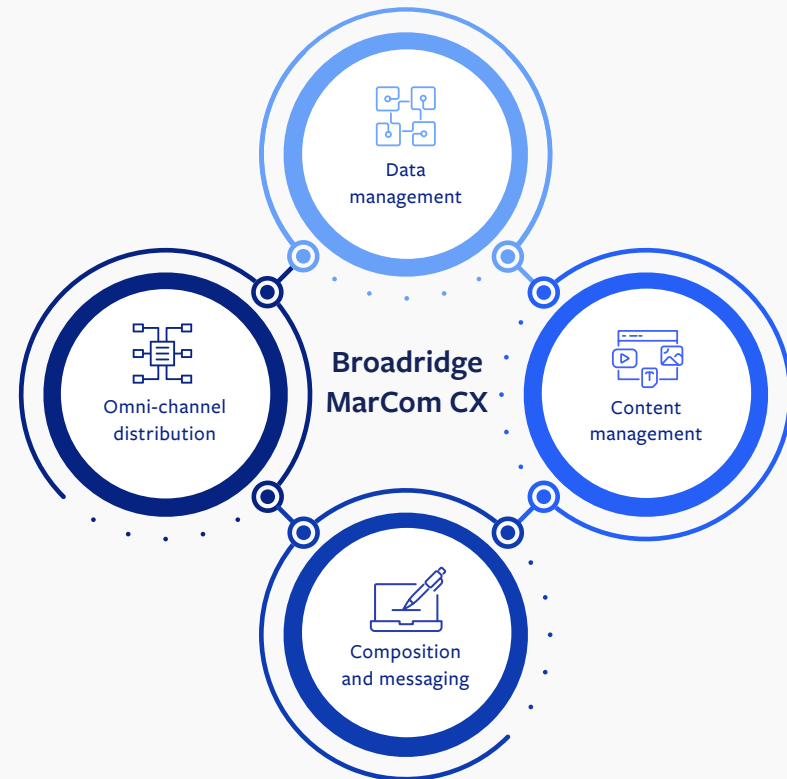
Advanced automation, analytics, and dissemination for retirement providers

MarCom CX: Upgrade retirement engagement for your clients

Automate and personalize multi-channel touchpoints for every participant. Design journey maps at scale, with dynamic templates that incorporate branding as well as audience-specific imagery and messaging.

Digital transformation.

Improve enrollment and communications journeys while reducing costs and your manual workload. MarCom CX drives digital transformation to automate and accelerate your engagement efforts.

- **API-based platform:** Work faster with real-time data, streamlined onboarding, and configurable business rules.
- **Enhanced agility:** Make quick, transparent updates that keep participants informed and satisfy regulatory requirements.

Dynamic experiences.

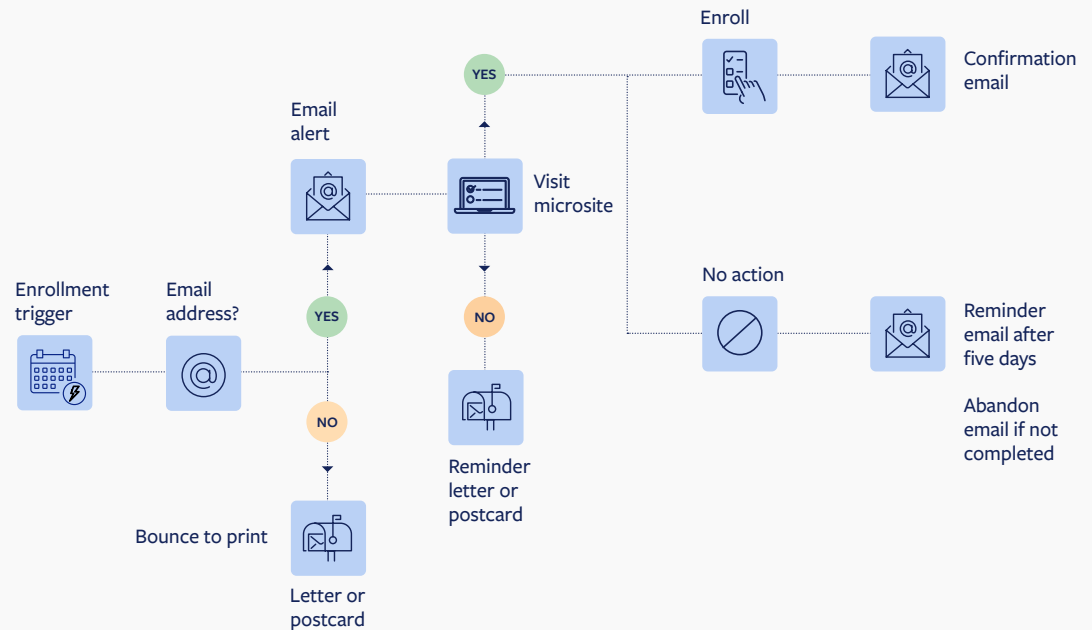Maximize engagement by connecting with participants through multiple channels: web, email, SMS, or mobile.

- **Personalization engine:** Send custom messaging using unique participant details.
- **User-friendly templates:** Easily incorporate your client's branding and apply relevant imagery and messaging across campaigns.
- **Automated journeys:** Map entire campaigns using workflow and channel preferences so no communications slip through the cracks.

Actionable analytics.

Know where benefits stand with customizable reporting and metrics. MarCom CX uses integrated analytics to provide real-time insights for more informed decisions.

- **Report suites:** Deliver in-depth reports and metrics for each journey.
- **Analytics dashboards:** Track, measure, and analyze recipient behavior. Combine with other business insights to uncover valuable improvement opportunities.

Enhance the retirement communications journey with automation and personalization

Enrollment trigger → Email address? → YES: Email alert → Visit microsite → YES: Enroll → Confirmation email
Email address? → NO: Bounce to print → Letter or postcard
Email alert → YES / NO → Reminder letter or postcard
Visit microsite → NO → Reminder letter or postcard
No action → Reminder email after five days → Abandon email if not completed

Reimagine the retirement communications experience with MarCom CX
To learn more, please contact: **sales@broadridge.com** ›
Or call: **+1 855 252 3822**

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