



WorkflowOne Enhances Retirement System's Member Satisfaction with Streamlined Statements

Client

Large Public Sector
Retirement System

Market

Financial Services

Solution

Critical Communications:
Bound Statement Booklets

Services

Digital Print Production
Electronic Statement Archive

Benefits

- Increased member satisfaction
- Cost control
- Enhanced brand image

"By being able to work with our existing archive systems, WorkflowOne helped us improve processes and avoid significant capital investment for our company."

Situation

With over 200,000 members, this large public sector retirement system located on the East Coast produces more than 1.6 million statement pages annually. The statements were formatted as multiple pages inserted into window envelopes and mailed out to members. This had been the design and the means of delivery for many years, although members found the multiple pages awkward to review and file.

The retirement system struggled with how to:

- Provide valuable information to members in a way that was efficient and easy to understand.
- Have more space for frequently asked questions, instructions, contact details, etc. without adding further bulk and mailing expense.
- Reduce member confusion and calls to their call center.
- Archive statement information efficiently.

Solution

WorkflowOne thoroughly reviewed the needs of the retirement system and explored its members' preferences to develop a solution that provides useful information in a more attractive format, as well as easy archiving. Because the solution is digitally printed, it allows greater personalization of information that is targeted to individual member needs.

WorkflowOne designed an 8-page, saddle stitched, full size booklet for annual statements that includes both static and variable (personalized) information for individual members. Improvements in the document layout made them easier to read and added space for more content, such as frequently asked questions, instructions, contact information, and more. Booklets are economically printed in black on pre-printed shells to add eye appeal by incorporating color. WorkflowOne handles the complete details of mailing to the system's 200,000 members annually.

A process was developed to generate PDF files of the booklets and automatically indexed them using a consistent naming convention. This makes it easier to retrieve information from the retirement system's existing customer service archive system when members call in. It also allowed the retirement system to use their existing archival tools, thus avoiding a costly investment in a new data archival system.

"Members now have all of the information they need at their fingertips in a consolidated booklet format."



WorkflowOne is a preferred supplier of critical customer communications to clients in a wide variety of industries. From programming through digital imaging, lettershop services and mailing, all aspects of your project are controlled by WorkflowOne under a single roof. We have redundant centers to provide an extra measure of security in case of business emergencies.

Critical Communications Facilities:

- Timonium, MD
- Salt Lake City, UT
- Columbus, OH
- Elgin, IL

Digital Operations:

- Dallas, TX

Benefits

By thoroughly analyzing organizational challenges and leveraging the latest digital technology, WorkflowOne was able to enhance member satisfaction and streamline processes at no additional expense for this large retirement system.

In the first year of using the new design, call center complaints dropped approximately 25%. In fact, most of the calls coming into the center were to compliment the organization on its innovative new statements. Members thanked the organization for making their statements easier to understand and maintain in their files.

The system's own customer team appreciated having an easier way to look up member information as they took calls. The organization as a whole benefited from leveraging its booklets for educational purposes as well as information sharing. By delivering more value and brand image at no additional cost, the system achieved a higher return on its investment in member communication.

Contact Us Today

To learn more about how WorkflowOne can generate results for your organization, contact your local representative or visit our website: workflowone.com

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