

INTERACTIVE MICROSITE ENHANCES COMMUNICATION

APPLYING AN INNOVATIVE WEB-BASED SOLUTION TO COMMUNICATE FUND CHANGES, REDUCE COSTS AND ENGAGE EMPLOYEES IN THEIR INVESTMENT CHOICES

CLIENT BACKGROUND

- A leader in the financial services industry specializing in investment advisory services for individuals
- More than 30,000 employees nationwide
- Decided to replace the plan's three asset allocation funds with seven new investment portfolios that offer a broader selection of ready-mixed investment choices
- Concerned about the impact this transition would have, since nearly every participant had money in the funds being eliminated

GOALS

- Successfully transition from three existing funds to seven new investment portfolios
- Effectively communicate changes to a decentralized employee population to ensure widespread understanding and acceptance
- Help employees make informed decisions about their new investment choices

- Communicate using a method that supports the company's "green" initiative
- Leverage innovative, interactive technology to increase employee engagement
- Help participants properly match their risk tolerance and investing objectives with an appropriate mix of asset classes

MERCER'S SOLUTION

- Created a dedicated microsite that included:
 - Fund mapping details
 - Interactive risk tolerance quiz
 - FAQs
- Microsite accessed from the plan's website, which allowed employees to easily take action
- Notified employees of the fund changes, microsite and risk tolerance quiz by mail to drive participants online

RESULTS

- In the three months following the announcement mailing, **>18,000 employees visited the microsite**, spending an average of >four minutes during each visit.
- **Total site visits exceeded 25,000**, demonstrating that employees returned to the microsite and viewed it as valuable source of information.
- More than **8,000 employees** used the interactive risk tolerance quiz.
- Client **saved approximately \$25,000 in production and printing costs** by using an electronic communications solution.
- Microsite continues to serve as an **ongoing resource for new hires and existing employees** wanting more detailed information about their investment options.

