

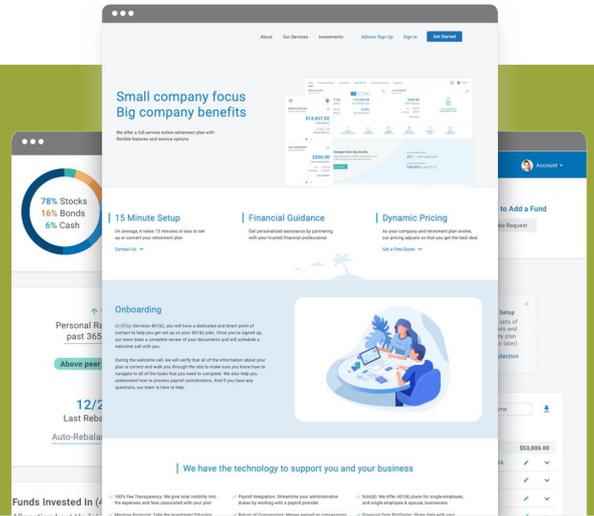


## RETIREMENT PLANNING INDUSTRY LEADER

# DIGITAL DASHBOARD DELIVERS 80% USER SATISFACTION WHILE LEAD-GEN SITE CONVERTS PROSPECTS TO PARTICIPANTS

### SUCCESS STORY

Our client asked ITX to help craft a solution that would draw more participants to its retirement planning tool and encourage more frequent use by them. ITX created a digital dashboard to provide quick, easy access to their 401(k) participant information. An external-facing lead-generation site, paired with product marketing best practices, accelerated conversion of site visitors to paying clients.



### PERFORMANCE POST-LAUNCH TRENDS

Does our 401(k) planning tool meet your needs?

## 80% PARTICIPANT SATISFACTION RATE

- Key new product features deliver high, sustained levels of product value to 401(k) plan participants, driving engagement.

### IMMEDIATELY CONSISTENT WEB TRAFFIC

- Net-new marketing site instantly enables self-education from potential product buyers, energizing the sales process.



### MEET THE BRAND

Our client is a leading provider of employer-sponsored retirement plans tailored to small-and medium-sized businesses. They provide financial institutions and retirement advisors with white label services and the tools needed to serve their customers.

### CLIENT FEEDBACK

*"Since we launched the Marketing Site, we are generating leads and gaining organic traffic at an incredible rate. Just to give an example, we have got more leads in a week since launch than the leads generated in the last 18 years. We are being booked for demos and lots of inquiries in our sales department.*

*We only regret not doing this earlier."*

### GOAL

Build, launch, and optimize a software product solution that drives revenue while increasing user participation. Support that functionality with a customer-facing marketing site to expand the product's reach and communicate product value.

# STRATEGY

ITX approached the problem by first considering the needs of multiple user types and ensuring that the new marketing and data visualization solutions would meet their unique needs. We then created a feature-rich interactive web application connected securely to the individual participant data with a beautiful, intuitive dashboard as the showpiece. A new lead-gen marketing site was produced with conversion rate optimization in mind, enabling the client to drive product traction among both direct customers and their employee-users.

## TOGETHER, WE IDENTIFIED THREE KEY IMPROVEMENT AREAS:



External-Facing, Lead-Gen Site



Intuitive Participant Dashboard



Human-Centered Design

### UNDERSTAND THE PROBLEM

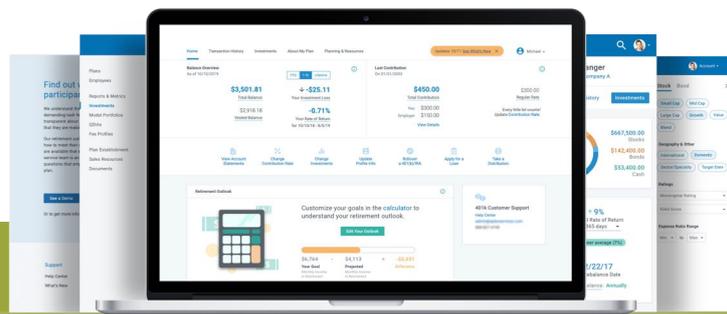


### IMPLEMENT TARGETED SOLUTIONS

Confusion with the existing product failed to resolve participants' retirement planning anxiety. Their inability to quickly access relevant plan information and to understand complex terms resulted in greatly diminished use. In the absence of a strong marketing website, traditional sales efforts and paper materials were the only way for new users to discover the value created by the product. Digital lead generation and user enrollment was not even possible.

ITX's product marketing team developed a full-funnel marketing approach: digital outreach generates organic leads and encourages visitors to the site. Mid-funnel activities deepen our relationship with businesses looking for a 401(k) management system for their employees. Once on the site, plan participants now enjoy a delightful experience. The Participant Dashboard offers easy access to relevant plan information. And the Retirement Outlook Calculator helps participants envision a more successful retirement. Both new product features drive user satisfaction and engagement.

ITX's continued enhancements to the client's online platform demonstrate our strong belief in the Continuous Innovation approach. We see our clients' software products as assets to be nurtured.



## RESULTS

- With the new Marketing site, ITX delivered the customer-facing communication vehicle our client needed to welcome qualified leads deep into the marketing funnel.
- The refreshed Participant site provided the interactive experience users asked for and helped to generate revenue growth by guiding users through each workflow to take the desired action.



Generating Qualified Leads



Driving Revenue Growth