the solutions **group**.≝



How did we help TIAA reassure Small Plan Benefit Administrators of its commitment to them?

The Challenge

TIAA's emerging market team had to confront a perception that they shifted focus to large AUM institutions resulting in attrition of small plan clients. They sought a new market positioning to illustrate continued support with both small plan clients and their participants.

The Solution

A communication plan directed at Small Plan Benefit Administrators to retain assets under management



TSG implemented our Strategy First process, and worked closely with internal stakeholders, field-facing staff, and Customer Insights to document

TSG conducted market research that included interviews with plan administrators. These conversations revealed pent-up frustrations and informed the approach

2

TSG was a key core team member that helped to ensure operational readiness:

3

 Contributing member of crossfunctional teams.



Finally, TSG conducted onsite training sessions in New York, Denver, and Charlotte to ensure everyone was understanding and communicating the

existing mindsets and perceptions.

for the marketing strategy. The go-to-market plan included a refreshed value proposition that was relevant to plan administrators.

- Developed message playbooks to provide context and content.
- Created and delivered training for key teams.
- Designed a practical desk calendar as an easy reference guide to keep key filing dates top of mind.

new positioning and story in the same way.



Sun	Mon	Tue	Wed	Thur	Fri	Sat	reference guide for details Register for an upcoming webinar through the "Attend a Plan Sponsor	
1	2	3	4	5	6	7	webinar" link on the PlanFocus* home page	
New Year's Day	New Year's Day observed						Stay informed	
8	9	10	11	12	13	14	Log in to PlanFocus for helpful tools and resources Retirement checklist mailed to participants	
15	16 Martin Luther King, Jr. Day	17	18	19	20	21	participants	
22	23	24	25	26	27	28		
29	30	31					You can download key deadlines from the compliance calendar on PlanFocus to Outlook or other email programs	



Sun	arch	Tue	Wed	Thur	Fri	Sat	for non-EACA plans, March 15 Download your plan financial reports through PlanFocus®
Jun	mon	lue					Stay informed 🖵
			1	2 \$	3	4	 Find information on the DOL Fiduciary Investment Advice Rule on the Compliance tab in PlanFocus
5	6	7	8	9	10	11	Looking ahead -00-
			\$				 Ensure you're properly preparing for your annual filings
12	13	14	15	16	17	18	 For your annual mings Ensure participants taking their initial Required Minimum Distribution meet the April 1 deadline
19	20	21	22	23	24	25	 CREF Money Market expense waiver ends April 14
							Important events 🕸
26	27	28	29	30	31		 NAIS Annual Conference, March 1 – March March 8 is International Women's Day—check out our Woman2Woman Community

Sun	Mon	Tue	Wed	Thur	Fri	Sat	April 15
						1	Stay informed DOL Fiduciary Investment Advice Rule
						Þ	becomes applicable, April 10
2	3	4	5	6	7	8	 End of CREF Money Market fee waiver April 14
							Important event 🛠
9	10 11	11	11 12	13	14	15	 It's National Financial Literacy Month-
5	10		12	15	14		check email for your toolkit
					1		
16	17	18	19	20	21	22	
23	24	24 25 26	26	27	28	29	You can download key deadlines from the compliance calendar on
30						PlanFocus® to Outlook or other	
							email programs

Plan sponsor online resources	TIAA.org/plansponsors	Your portal to solutions, news, information, and insights for running your plan. Log in to the secure PlanFocus ⁺ site to manage daytoday plan activities, access reports, view webinars and much more. ⁺
Plan Sponsor Webinars	TIAA.org/public/plansponsors/news/ webinars	Look to our interactive webinar series for insights to help you fulfill your fiduciary responsibilities enhance your plan administration and engage your employees.
TIAA Institute	TIAAinstitute.org	In-depth research and insightful perspective on issues that shape the retirement landscape
My TIAA The secure participant website	TIAA.org	Log in to the secure site to manage your personal account, access tools, and schedule one-on-one appointments.
Public website	TIAA.org	The full spectrum of TIAA from investment performance to advice and guidance to resources across all our financial services.
Participant webinars	TIAA.org/ve TIAA.org/public/land/ employees-boost-financial-know-how	Attend live webinars, or view to pre-recorded webinars.
Woman2Woman	TIAA.org/w2w	Conversations and insights to help achieve financial well-being.
Starting Out	TIAA.org/startingout	Inspiration and information through real-life stories and tips from young participants who are building their own financial futures.
MyRetirement	myretirement.org	An active community of pre- and current retirees, discussing everything from lifestyle to health and wellness.
Twitter	V twitter.com/TIAA	Follow TIAA and get the latest updates.
Facebook	facebook.com/TIAA	Join the conversation.
LinkedIn	in linkedin.com/company/TIAA	Connect with the TIAA network.
YouTube	youtube.com/TIAA	View presentations on topics from responsible investing to college savings to life insurance
	PlanFocus. TIAA-CREF Individual & Institutional Service	users at your organization each year to help protect the sensitive nature of information on vices, LLC, Teachers Personal Investors Services, Inc., and Nuveen Securities, LLC, Membe
	Association of America (TIAA) and Colleg	oducts. Annuity contracts and certificates are issued by Teachers Insurance and Annuity ge Retirement Equities Fund (CREF), New York, NY. sociation of America-College Retirement Equities Fund, 730 Third Avenue, New York, NY 1001

The Point

TSG helped TIAA re-establish confidence and trust within the small plan market.

- TIAA experienced strong demand for the plan sponsor desk calendars for three consecutive years; client feedback indicated high perceived value with continued requests.
- Internal readiness tools and training armed the field staff for the new go-to-market approach.
- Field team leaders used the materials TSG developed for ongoing team training sessions and refreshers.
- The new story and value proposition opened conversations about the new TIAA offer and engaged small plan administrators in plan updates.

the solutions **group**.e

info@thinktsg.com

think**!tsg**™