

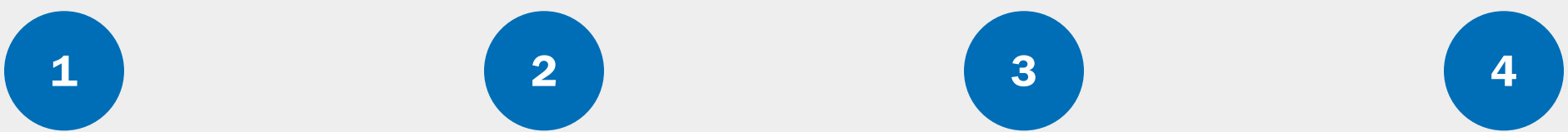
How did we help TIAA reassure Small Plan Benefit Administrators of its commitment to them?

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



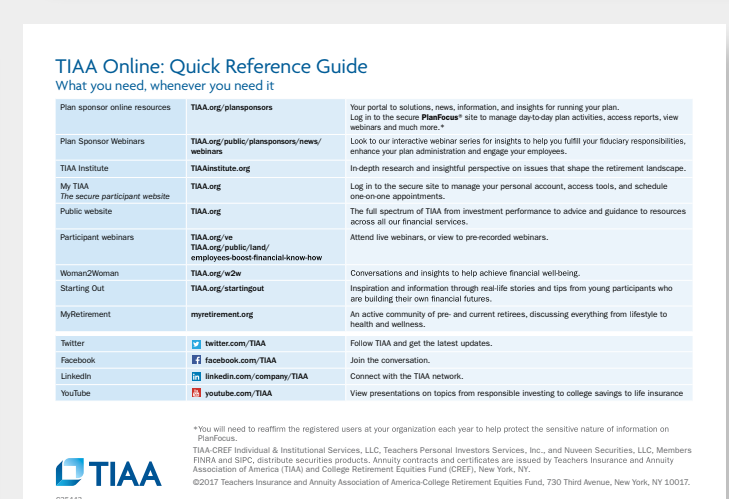
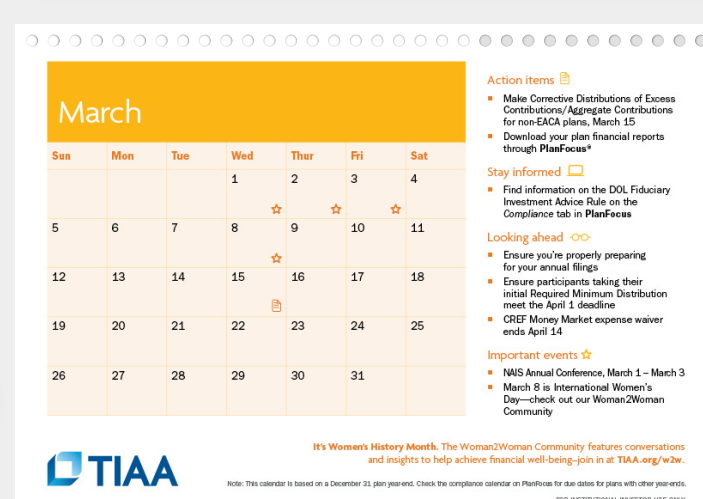
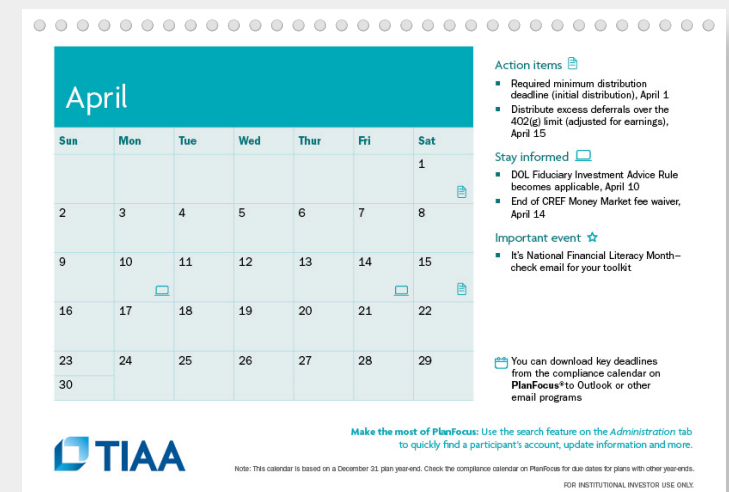
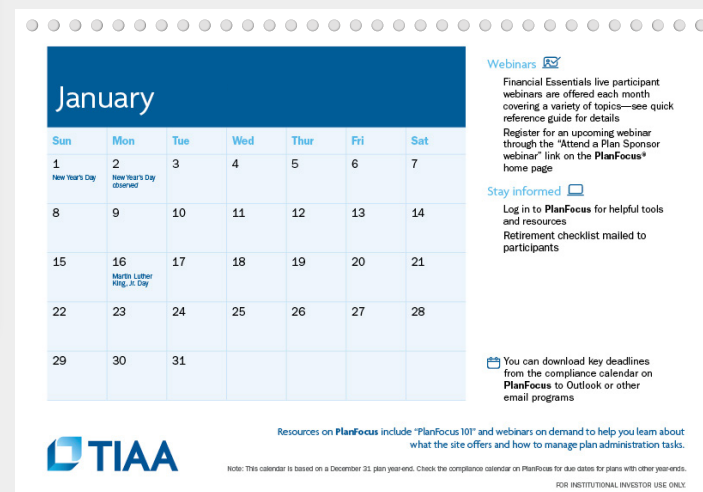
1 TSG implemented our Strategy First process, and worked closely with internal stakeholders, field-facing staff, and Customer Insights to document existing mindsets and perceptions.

2 TSG conducted market research that included interviews with plan administrators. These conversations revealed pent-up frustrations and informed the approach for the marketing strategy. The go-to-market plan included a refreshed value proposition that was relevant to plan administrators.

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

- Contributing member of cross-functional teams.
- 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.

4 Finally, TSG conducted onsite training sessions in New York, Denver, and Charlotte to ensure everyone was understanding and communicating the new positioning and story in the same way.



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.