

How did we re-engineer a plan transitions communications partnership model and workflow, enabling a client to grow and change while maintaining its reputation for high-touch support?

The Challenge

A leading 403(b) retirement plan provider needed to accommodate a significant increase in their plan transition communications program by augmenting their team with external resources offering specialist skills. This required:

- Understanding of workflow and process development
- Template design and production
- Quality control and content reviews
- Automation and self-directed programs
- Dedicated project managers to provide guidance and support to communication consultants and their clients

The Solution

An efficient end-to-end workflow infused with logic loops

- 1 TSG engineered and implemented a new workflow to define new project requests, executed an end-to-end production process dovetailing with our client's print, data, and fulfillment teams to meet tight deadlines without overtime or overrun charges.
- 2 TSG onboarded dedicated, highly skilled project managers, quality control staff, and production artists to work directly with our client's field-based communications teams to manage client requirements and changes.
- 3 As part of the process, TSG:
 - Established performance metrics to drive continuous improvements
 - Conducts round management and notifies client if they exceed norms
 - Provides communication strategy consultation, copy development, and custom design, in addition to our quality control and production services
 - Creates materials that impress at finalist presentations and win awards for clients
 - Applies our experience in retirement services to maintain content continuity across segments and offer consultation on subject matter and best practices
 - Moved to Workfront for a seamless internal integration: Real-time updates of project progress and automated input, production, and output to vendors improves communications and mitigates risk of missing deadlines

The Point

Thanks to the program TSG developed—and continues to improve upon—our client realized significant cost savings and timing efficiencies. TSG's initial program design laid the groundwork for the program to scale up over time in both volume and complexity of projects.

Our reliability, analytics, and expertise minimize business risk for the client and inspire a confidence that has validated 10 years of uninterrupted partnership renewal. Our commitment to continuous improvement and our holistic approach to account management and quality control—with particular attention paid to key accounts—deliver program-wide consistency and accuracy in a uniquely complex environment.