Total Retirement Plans
Rebranding Strategy

Board of Trustees Presentation - July 16, 2015
Business evolution is inevitable and necessary.
The logo. The legend.
Figure 7. Satisfaction with RSD Services* (Q5): All Respondents.

<table>
<thead>
<tr>
<th>Service</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neither</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Services/Call Center</td>
<td>33.5</td>
<td>47.2</td>
<td>14.1</td>
<td>3.5</td>
<td>1.7</td>
</tr>
<tr>
<td>ORBIT</td>
<td>34.9</td>
<td>46.5</td>
<td>13.2</td>
<td>3.8</td>
<td>1.6</td>
</tr>
<tr>
<td>Retirement Processing</td>
<td>34.7</td>
<td>44.9</td>
<td>14.9</td>
<td>4.4</td>
<td>1.6</td>
</tr>
<tr>
<td>Disability Services</td>
<td>16.6</td>
<td>28.8</td>
<td>48.0</td>
<td>3.5</td>
<td>2.2</td>
</tr>
<tr>
<td>Death Benefit Services</td>
<td>20.4</td>
<td>34.5</td>
<td>40.1</td>
<td>3.5</td>
<td>1.6</td>
</tr>
<tr>
<td>State Health Plan†</td>
<td>23.9</td>
<td>39.7</td>
<td>16.6</td>
<td>10.9</td>
<td>8.9</td>
</tr>
<tr>
<td>Direct Deposit ‡</td>
<td>50.0</td>
<td>41.4</td>
<td>7.0</td>
<td>0.7</td>
<td>0.7</td>
</tr>
<tr>
<td>Change of Personal Information</td>
<td>32.3</td>
<td>47.8</td>
<td>15.8</td>
<td>2.8</td>
<td>1.2</td>
</tr>
<tr>
<td>Supplemental Insurance</td>
<td>26.5</td>
<td>42.2</td>
<td>21.4</td>
<td>6.5</td>
<td>3.5</td>
</tr>
<tr>
<td>Retirement Planning Conference</td>
<td>23.4</td>
<td>43.2</td>
<td>24.8</td>
<td>6.2</td>
<td>2.6</td>
</tr>
<tr>
<td>Service Purchases</td>
<td>22.2</td>
<td>35.2</td>
<td>32.7</td>
<td>5.4</td>
<td>4.5</td>
</tr>
<tr>
<td>Transfer Benefit Option</td>
<td>17.9</td>
<td>33.9</td>
<td>42.7</td>
<td>2.9</td>
<td>2.7</td>
</tr>
</tbody>
</table>
My retirement papers were submitted late due to delays by my employer...even with these delays, RSD was able to process my application in a timely way...communication through voice, email and website was quite good.

Excellent program excellently well-handled. You make info available and you staff your offices with people who are kind and know their areas. Good for you on all counts!

I had excellent guidance through my retirement process and felt very secure.
Opportunity

It will take more than just participation in the traditional pension plan – and Social Security benefits – to become retirement ready.

Solution

The North Carolina Total Retirement Plans
Opportunity

North Carolina public employers are finding it difficult to recruit and retain talented staff because employers and their staff don’t effectively communicate the value of the retirement benefits the state has to offer.

Solution

The North Carolina Total Retirement Plans
Opportunity

North Carolina retirement system benefit recipients are not aware of the cost-effective supplemental insurance offerings that they can take advantage of as former public employees.

Solution

The North Carolina Total Retirement Plans
Value Proposition

The North Carolina Total Retirement Plans offer the oversight and protection of the traditional, well-managed and highly trusted North Carolina Retirement System with the benefits of access to additional low-fee products, great customer service and on-the-go mobile access for members and benefit recipients.
Objectives

Use interactive, appealing and engaging methods to help our members achieve 80% retirement salary replacement. How?

• Inform and educate members about the total retirement solutions offered by their state employer to assist them in preparing for retirement.

• Inform and educate employers about the total retirement solutions offered by the state and how they can use them to recruit and retain talented employees.

• Inform and educate benefit recipients about the benefits they can take advantage of as part of their participation in the state’s total retirement solutions and make their dollars stretch farther.
Goals

1. To **create one compelling voice** for all of Retirement Systems communications.

2. To **leverage the trust** members have in the pension.

3. To ensure that **members** have access to low-cost, low-risk insurance products in retirement.

4. To **unify all pension systems**, contribution plans, vendors and supplemental retirement insurance offerings using one brand in print, face-to-face, web and voice communications channels.
Color palette

**NC Navy Blue**
Pantone 541C
CMYK: 30/0/88/20
RGB: 0/63/113
Hex: 003C71

**NC Gray**
Pantone 431C
CMYK: 11/1/0/64
RGB: 91/103/112
Hex: 5B6770

**NC Light Blue**
Pantone 542C
CMYK: 66/19/1/4
RGB: 86/160/211
Hex: 764FD4

**NC Green**
Pantone 631C
CMYK: 69/0/100/0
RGB: 84/185/72
Hex: 53602A

**NC Yellow**
Pantone 7406C
CMYK: 0/20/100/2
RGB: 241/196/0
Hex: F1C000

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**Annual Benefits Statement**

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**From the Treasurer**
Target Audiences

- Active Plan Members (At Different Stages of Their Careers)
- Retirees & Benefit Recipients
- Employers
- Associations
Timeline

**APRIL 2015**
- PLANNING PHASE
  - Alignment with Treasurer
  - Finalizing Strategic Plan
  - Finalizing Messaging, Presentation Materials & Talking Points

**MAY 2015**

**JUNE 2015**
- INTERNAL EDUCATION
  - Internal Staff Training, Board Presentations, Vendor Presentations

**JULY 2015**
- SOFT LAUNCH
  - Incorporating new color schemes into all outward-facing RSD materials; introduction of retirement readiness messaging to all materials; integrating the SRP and RSD Style and Branding Guides.

**AUGUST 2015**
- Implementation of TRP logo & TRP messaging to all outward-facing RSD materials.

**SEPTEMBER 2015**

**OCTOBER 2015**
- FULL LAUNCH
  - Communications to employers, associations, active members, benefit recipients. Logo introduction to all outward-facing RSD materials.
Re-Branding Priorities – Priority 1

- Compilation of RSD & SRP Branding Guides
- Forms & Letters
- Internal Documents (Letterhead, Presentation Templates)
- Newsletters & eCommunication
- Online Retirement Toolkits
- Website/MyNCRetirement
- Social Media Sites

Priority 2

- TSERS & LGERS Retirement Planning Videos
- Member Retirement Handbooks
- Employer Manuals
- Discontinued Service Retirement Materials
- Guidance Publications
- Legislative Digests
Hard Launch Mechanisms

- Website / MyNCRetirement
- Email to Employers
- Email to Actives
- Announcements at Association Roundtables & Emails
- Supporting articles in the Retirement Monitor
- Supporting articles in emails to actives
- Integrated counseling sessions
- Combined group presentations and webinars
It’s more than just rebranding…it’s a way of life!