

Reducing Complexity in Client Communications for a National Retirement Plan Administrator

One of the nation's leading retirement plan administrators supports millions of partnerships with deep relationships with some of the top financial firms in the U.S. Their business model requires managing a high volume of personalized participant communications on behalf of multiple clients—each with unique branding, contact info, messaging, and compliance requirements.

CLIENT

A National Retirement Plan Administrator

FOCUS

Reduce administrative costs while increasing service accuracy

The Challenges

The organization was relying on hundreds of rigid, template-based communications to meet the needs of each individual client. Each partner's communication required its own set of logos and branding elements, unique phone numbers and contact information, customized plan descriptions and product details, and disclosures, legal language, and regulatory content.

This approach created significant challenges:

- **Over 500 Active Templates** across clients and campaigns
- **High Maintenance Burden** with frequent manual updates
- **Slow Time-to-Market** for launching communications
- **Risk of Errors** from managing inconsistencies across templates

The volume and complexity of template management were unsustainable and resource-intensive.

The Solution

O'Neil Digital Solutions implemented its ONEsuite platform to modernize the client's communication strategy and reduce operational complexity.

Key Elements:





- **Profile-Driven Personalization:** Centralized business rules and partner-specific data in ONEsuite's profile management system, enabling dynamic content insertion.
- **Template Consolidation:** Reduced over 500 static templates down to just 15 dynamic templates, each capable of rendering partner-specific messaging, branding, and content automatically.
- **Self-Service Content Management:** Empowered internal teams to update client-specific variables (e.g., logos, disclosures, contact details) without IT support.

This approach ensured accuracy, brand compliance, and efficiency—while dramatically simplifying day-to-day operations.



The Results

By implementing ONEsuite, this Wealth and Retirement Services Provider achieved remarkable improvements:

 Reduced Complexity	500+ Templates Consolidated into 15
 Reduced Workload	85% Reduction in Template Maintenance Workload
 Greater Efficiency	Accelerated Production Timeline for new campaigns and plan updates
 Improved Communications	Improved Accuracy and Brand Consistency across all communications

Expanding the Partnership

Following the success of the template consolidation initiative, the retirement plan administrator expanded the use of ONEsuite to manage other critical communication workflows, including:

- **Welcome Kits & Enrollment Packets**
- **Quarterly Statements**
- **Annual Notices & Compliance Letters**

The platform's scalability continues to support new partnerships and program launches—without adding operational strain.

Conclusion

By shifting from a template-heavy, manual process to a streamlined, profile-driven model, this leading plan administrator gained control, flexibility, and speed. O'Neil's ONEsuite platform provided the technology foundation to reduce complexity while continuing to deliver highly personalized, compliant communications for every client.

Business Impact

O'Neil's solution delivered transformative results:

- **Reduced Operational Overhead** by streamlining content production and updates
- **Increased Speed and Agility** for onboarding new clients and plans
- **Strengthened Client Relationships** with more accurate, customized communications
- **Enhanced Scalability** for growth into new markets and service offerings

Get In Touch

Learn how O'Neil Digital Solutions can transform your financial communications.

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