



Clackamas County

2023 Q2 and Q3 Campaign: metric report



Digital Engagement campaign

- Flyer (mailed): 6/21/23
- Email: deployed 6/29/23

Clackamas County – Digital Engagement



Simple, intuitive and always accessible

Clackamas County and Clackamas County Housing Authority 457(b) Deferred Compensation Plan

We've made it easy, intuitive and secure for you to manage your account. Log in to access account information, such as account balances, investment option information and quarterly statements, as well as conduct transactions including how your contributions are invested and maintaining your beneficiary information. You can also download the statements and resources that will help you confidently take control of your finances.

Take advantage of myChoiceMoney, an interactive educational experience to help you estimate an early withdrawal and explore ways to reconstruct the future you envision.

- First time users**
clackamas.beready2retire.com
- 1 Click Register Now
 - Select the way you would like to create your online access.
 - If you select Social Security number and date of birth, follow the instructions including confirm your identity.
 - You can also use your Personal Identification Number (PIN) and Social Security number to receive your PIN in the mail after you were enrolled. If you can't locate your PIN, you can order on the website or by calling 800.558.8291.
 - 2 Set up a unique username and password for use on the website and the Voya Retire mobile app.
 - 3 Provide your mobile number on an alternate email address to ensure the security of your account for the future recovery of your username or password, as needed, or if you log out/in's are not recognized.

Please read your PIN. If using the phone services you will receive an SMS texted PIN for enhanced account security. To keep your information secure, please avoid writing down your log-in credentials. Don't allow social networking information and never put them in e-mail.



Download the app in a snap

VOYA FINANCIAL

Download the Voya Retire mobile app to save in a snap

By using our app, you can quickly help boost your retirement savings and manage your money while on the go.

We've made it easy, intuitive and secure for you to save all in one place. You'll have quick access to your retirement plan, investment accounts, smart learning tools, resources and more... everything you need to confidently take control of your finances—all in the palm of your hand.

Wherever life takes you, take the Voya Retire mobile app with you, so you can retire well—with confidence.

Go mobile. Download the app to save in a snap

The Voya Retire app is available from the App Store or Google Play (Playstore). Retire on the go with the Voya Retire mobile app.

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DISCLAIMER

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Account access flyer: June 21, 2023

- Mailed ~2,923 – all participants with a balance
- Mailing coincided with Clackamas.beready2retire.com site redesign

Mobile app email: June 29, 2023

Sent	Delivered	Total opens*
1872	1869	1818

*Total opens is cumulative.



Clackamas County – Mobile app email

Deployment metrics

Date	Delivered	Unique opens		
		Total	Desktop	Mobile
6/29/23	1869	1075 (57.52%)	1029 (95.72%)	46 (4.28%)

Hyperlinks clicked: N/A – none in email

Average benchmarks (All industries) - open rate: 19.21%, click-through activity: 2.44%

Average benchmarks (Financial Services) - Unique open rate: 20.20%, click-through activity: 2.50%

Email Marketing Benchmarks for 2023:

<https://www.webfx.com/blog/marketing/email-marketing-benchmarks/>

Clackamas County – Employee engagement



Employee engagement

	Plan data	Benchmark
Overall engagement	46%	34%
Web engagement	40%	30%
Mobile app engagement	10%	6%
Authenticated call engagement	5%	6%
eDelivery	55%	45%
Web registration	49%	40%

Q1 2023

Benchmark: Government



Employee engagement

	Plan data	Benchmark
Overall engagement	49%	35%
Web engagement	40%	29%
Mobile app engagement	11%	6%
Authenticated call engagement	10%	9%
eDelivery	54%	44%
Web registration	50%	41%

Q2 2023

Benchmark: Government



Employee engagement

	Plan data	Benchmark
Overall engagement	49%	35%
Web engagement	40%	30%
Mobile app engagement	12%	7%
Authenticated call engagement	10%	9%
eDelivery	53%	44%
Web registration	50%	42%

Q3 2023

Benchmark: Government

Clackamas County – Employee engagement

Drill Down	Quarter of INTERACTION_DATE	Total Logins Mobile	Total Logins Web	Unique Users Mobile	Unique Users Web
Aggregated	Q1 2021	22	3,578	21	598
	Q2 2021	18	3,218	15	544
	Q3 2021	42	3,076	35	542
	Q4 2021	56	4,073	44	717
	Q1 2022	72	4,268	58	654
	Q2 2022	109	3,557	67	484
	Q3 2022	186	3,641	105	489
	Q4 2022	208	4,115	128	664
	Q1 2023	297	4,143	170	733
	Q2 2023	542	4,088	184	593
	Q3 2023	225	3,723	140	589

2021 – Quarterly average:

- Mobile logins: 35
- Web logins: 3,486
- Unique mobile users: 29
- Unique web users: 600

2022 – Quarterly average:

- Mobile logins: 143
- Web logins: 3,895
- Unique mobile users: 90
- Unique web users: 573

2023 – Quarterly average:

- Mobile logins: 355
- Web logins: 3,985
- Unique mobile users: 165
- Unique web users: 638

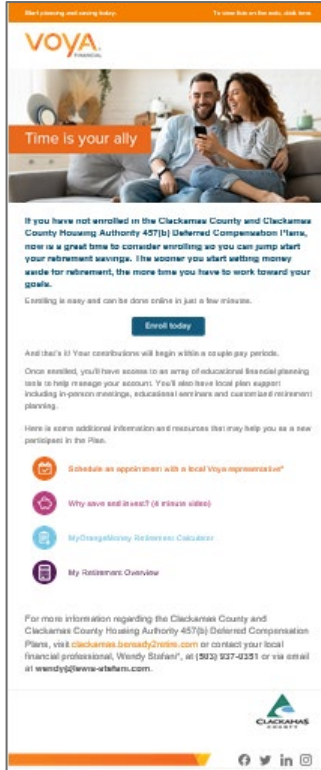
Q4 and Q1 trend: highest volume of total web logins and unique web users

Q2 2023: highest number of total mobile logins (542) and unique mobile users (184)

COLA email campaign

- Enrollment email: deployed 8/24/23, 9/7/23
- Increase Deferral Amount email: deployed 8/14/23, 9/7/23

Clackamas County – Enrollment email



August 24, 2023

Sent	Delivered	Total opens*
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2167	2161	926
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September 7, 2023

Sent	Delivered	Total opens*
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2160	2157	1307
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*Total opens is cumulative.

Clackamas County – Enrollment email

Deployment metrics

Date	Delivered	Unique opens		
		Total	Desktop	Mobile
8/24/23	2161	511 (23.65%)	503 (98.43%)	8 (1.57%)
9/7/23	2157	746 (34.59%)	725 (97.18%)	21 (2.82%)

Hyperlinks clicked

Click Activity	8/24/23	9/7/23
Plan enrollment information	7 / 511 (1.37%)	24 / 746 (3.22%)
clackamas.beready2retire.com	6 / 511 (1.17%)	11 / 746 (1.47%)
Schedule an appointment	6 / 511 (1.17%)	13 / 746 (1.74%)
My Retirement Overview	5 / 511 (0.98%)	4 / 746 (0.54%)
MyOrangeMoney calculator	3 / 511 (0.59%)	4 / 746 (0.54%)
Why Save? video	1 / 511 (0.20%)	3 / 746 (0.20%)

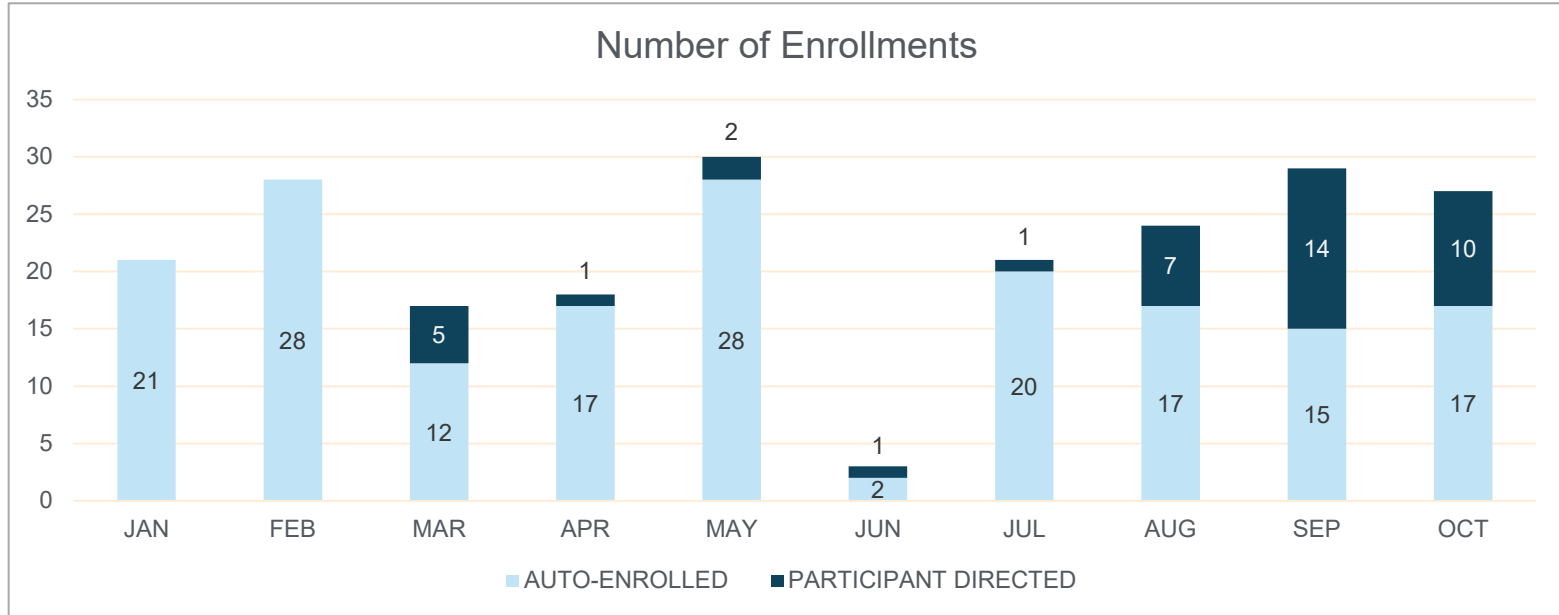
Average benchmarks (All industries) - open rate: 19.21%, click-through activity: 2.44%

Average benchmarks (Financial Services) - Unique open rate: 20.20%, click-through activity: 2.50%

Email Marketing Benchmarks for 2023:

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Clackamas County – Plan metrics: Enrollment



Email deployment 1: 8/24/23

7 participant directed enrollments from 8/24/23 – 9/6/23

Email deployment 2: 9/7/23

19 participant directed enrollments 9/7/23 or later

Clackamas County – Increase Deferral Amount email

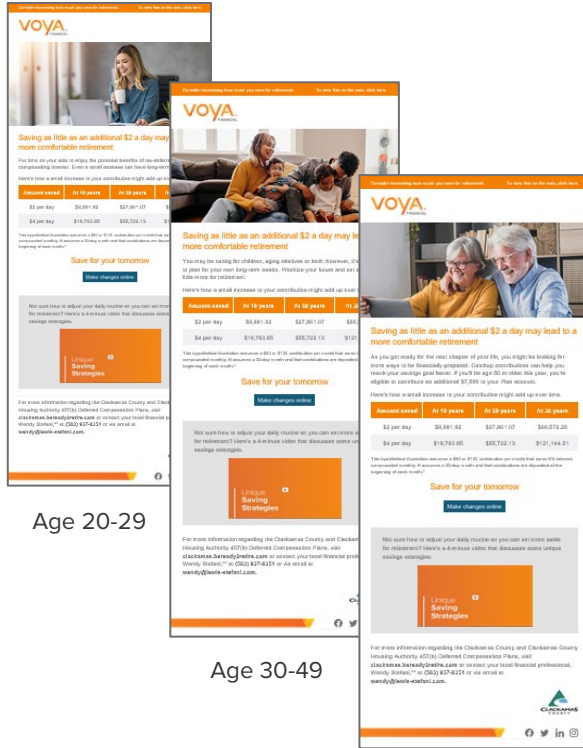
August 14, 2023

Targeted Age group	Sent	Delivered	Total opens*
20-29	98	97	103
30-49	784	763	691
50+	433	417	384

September 7, 2023

Targeted Age group	Sent	Delivered	Total opens*
20-29	98	97	105
30-49	764	763	640
50+	418	417	335

*Total opens is cumulative.



Age 20-29

Age 30-49

Age 50+

Clackamas County – Increase Deferral Amount email

Deployment metrics – 8/14/23

Targeted Age Group	Delivered	Unique opens		
		Total	Desktop	Mobile
20-29	97	65 (67.01%)	63 (96.92%)	2 (3.08%)
30-49	763	449 (58.85%)	438 (97.55%)	11 (2.45%)
50+	417	235 (56.35%)	225 (95.74%)	10 (4.26%)

Hyperlinks clicked – 8/14/23

Click Activity	Targeted Age Group		
	20-29	30-49	50+
clackamas.beready2retire.com	2 / 65 (3.08%)	5 / 449 (1.11%)	5 / 235 (2.13%)
Unique savings strategies video	2 / 65 (3.08%)	3 / 449 (0.67%)	2 / 235 (0.85%)

Average benchmarks (All industries) - open rate: 19.21%, click-through activity: 2.44%

Average benchmarks (Financial Services) - Unique open rate: 20.20%, click-through activity: 2.50%

Email Marketing Benchmarks for 2023:

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Clackamas County – Increase Deferral Amount email

Deployment metrics – 9/7/23

Targeted Age Group	Delivered	Unique opens		
		Total	Desktop	Mobile
20-29	97	60 (61.86%)	54 (90.00%)	6 (10.00%)
30-49	763	402 (52.69%)	400 (99.50%)	2 (0.50%)
50+	417	212 (50.84%)	207 (97.64%)	5 (2.36%)

Hyperlinks clicked – 9/7/23

Click Activity	Targeted Age Group		
	20-29	30-49	50+
clackamas.beready2retire.com	5 / 60 (8.33%)	2 / 402 (0.50%)	3 / 212 (1.42%)
Unique savings strategies video	2 / 60 (3.33%)	2 / 402 (0.50%)	2 / 212 (0.94%)

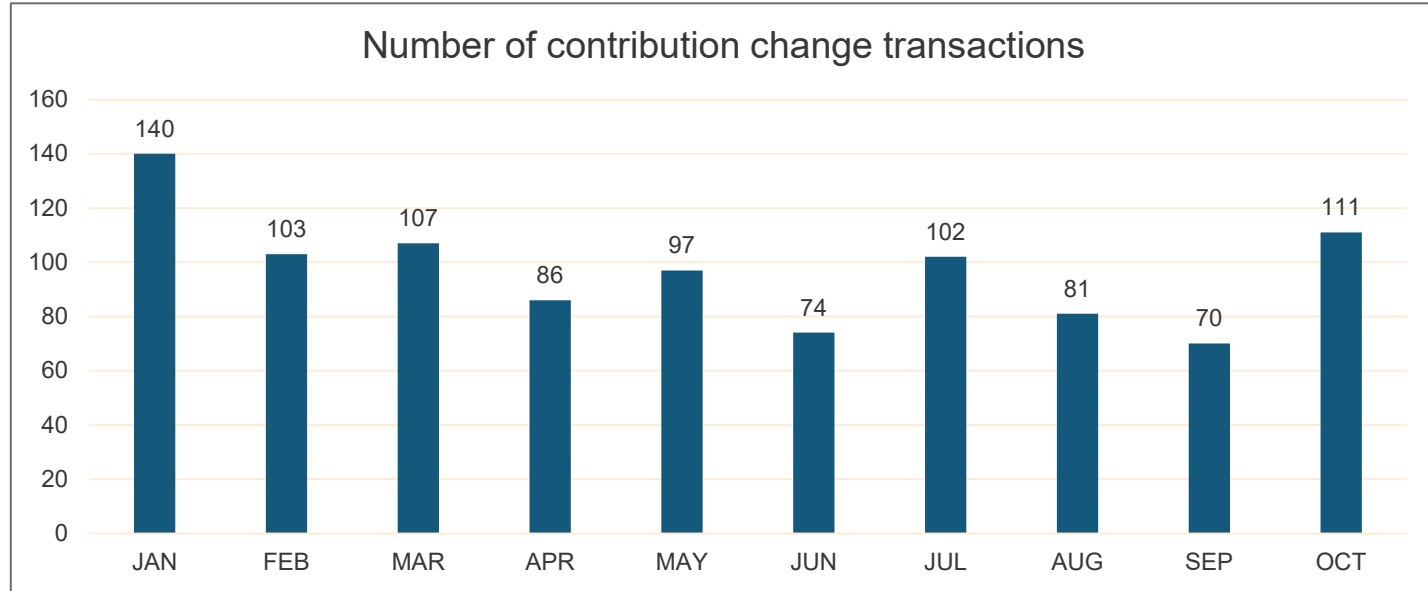
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Average benchmarks (Financial Services) - Unique open rate: 20.20%, click-through activity: 2.50%

Email Marketing Benchmarks for 2023:

<https://www.webfx.com/blog/marketing/email-marketing-benchmarks/>

Clackamas County – Plan metrics: Deferral



Email deployment 1: 8/14/23

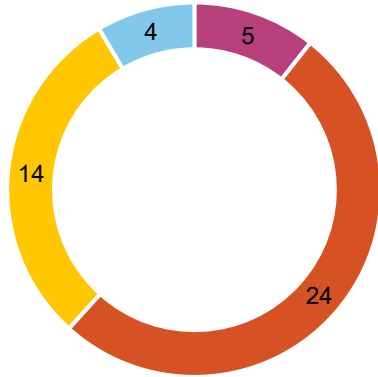
Email deployment 2: 9/7/23

Clackamas County – Plan metrics: Deferral

ppt = unique participant; trxn = transaction

AUG – 47 transactions (8/14/23 or later)

- < Age 30
- Age 30-49
- Age 50+
- Did not receive email

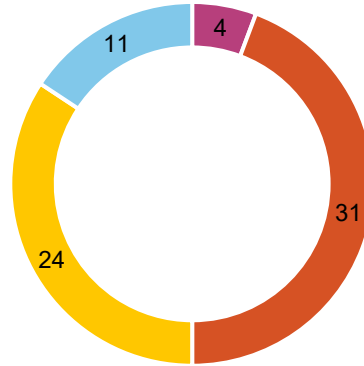


Age 20-29:
3 ppts, 5 trxn = **3.09% ppt action**

Age 30-49:
20 ppts, 24 trxn = **2.62% ppt action**

Age 50+:
11 ppts, 14 trxn = **2.64% ppt action**

SEP – 70 transactions

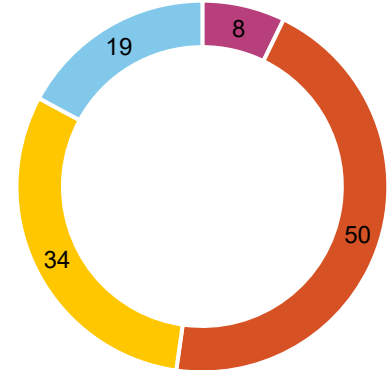


Age 20-29:
3 ppts, 4 trxn = **3.09% ppt action**

Age 30-49:
24 ppts, 31 trxn = **3.15% ppt action**

Age 50+:
20 ppts, 24 trxn = **4.80% ppt action**

OCT – 111 transactions



Age 20-29:
7 ppts, 8 trxn = **7.22% ppt action**

Age 30-49:
35 ppts, 50 trxn = **4.59% ppt action**

Age 50+:
24 ppts, 34 trxn = **5.76% ppt action**