



Clackamas County

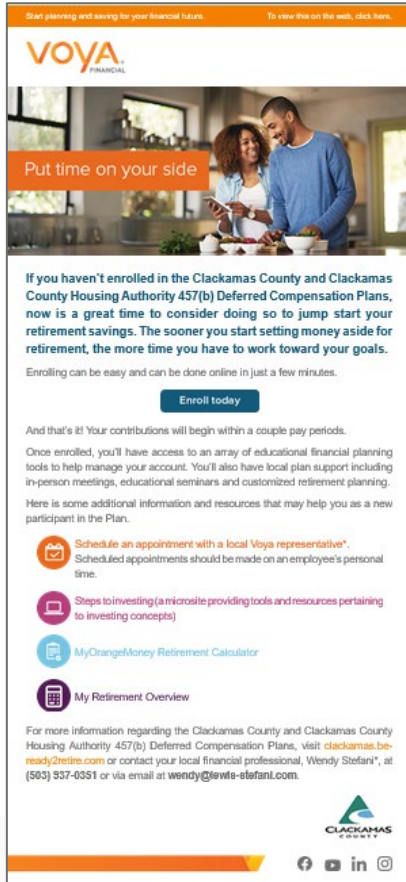
2024 COLA (Enroll/Save More) Campaign: email metric report



COLA email campaign

- Enrollment email: deployed 9/3/24
- Increase Deferral Amount email: deployed 9/13/24

Clackamas County – Enrollment email



September 3, 2024

Sent	Delivered	Total opens*
2162	2157	1111

*Total opens is cumulative.

Clackamas County – Enrollment email

Deployment metrics

Date	Delivered	Unique opens		
		Total	Desktop	Mobile
9/3/23	2157	610 (28.3%)	595 (97.5%)	15 (2.5%)

Hyperlinks clicked

Click Activity	9/3/23
Plan enrollment information	15 / 610 (2.46%)
My Retirement Overview	9 / 610 (1.48%)
Schedule an appointment	5 / 610 (0.82%)
clackamas.beready2retire.com	4 / 610 (0.66%)
MyOrangeMoney calculator	4 / 610 (0.66%)
Steps to investing (microsite)	1 / 610 (0.16%)

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 – Increase Deferral Amount email



Age 20-29

Age 30-49

Age 50+

September 13, 2024

Targeted Age group	Sent	Delivered	Total opens*
20-29	108	105	97
30-49	793	790	736
50+	471	470	422

*Total opens is cumulative.

Clackamas County – Increase Deferral Amount email

Deployment metrics – 9/13/24

Targeted Age Group	Delivered	Unique opens		
		Total	Desktop	Mobile
20-29	105	60 (57.1%)	59 (98.3%)	1 (1.7%)
30-49	790	434 (54.9%)	438 (97.55%)	11 (2.45%)
50+	470	244 (51.9%)	237 (97.1%)	7 (2.9%)

Hyperlinks clicked – 9/13/24

Click Activity	Targeted Age Group		
	20-29	30-49	50+
Log in (clackamas.beready2retire.com)	2 / 60 (3.33%)	12 / 434 (2.76%)	2 / 244 (0.82%)

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/>

2024 Marketing and Communication Strategy



2024 participant marketing communication calendar

Q1

Q2

Q3

Q4

NATIONAL CAMPAIGNS / EDUCATIONAL CONTENT

Get Organized
Educational content
Scheduled messages

- Cybersecurity
- Financial Wellness
- Beneficiary



Take Action
Educational content
Scheduled messages

- ASW / Online Experience
- Retirement Savings

Evaluate Protection Needs
Educational content
Scheduled messages

- Voya Learn
- Market Volatility
- Enrollment



Set Up for New Year
Educational content
Scheduled messages

- NRSM
- Year End



TARGET ACTION CAMPAIGNS

Digital Engagement
- New Account Experience
- eDelivery adoption

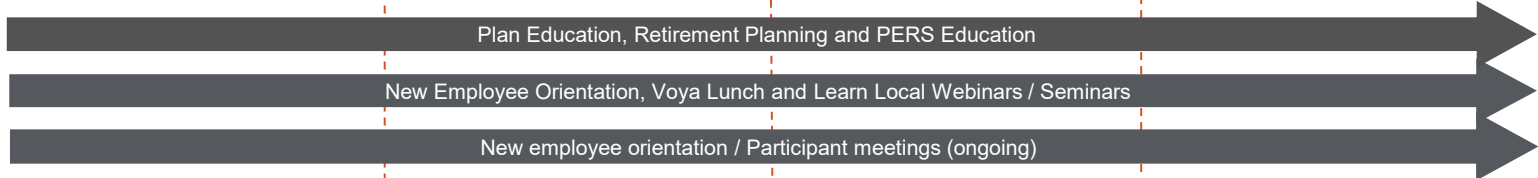
Preparing for retirement & Plan retention campaign

Enrollment & Increase deferral campaign

Beneficiary campaign



LOCAL OFFICE SUPPORT / SERVICES



FINANCIAL WELLNESS WEBINARS

457 PLAN OVERVIEW

RETIREMENT READINESS

FINANCIAL WELLNESS

DIGITAL ENGAGEMENT

STAY THE COURSE

RETIREMENT GOALS AGE >40

ESTATE PLANNING

SEASONAL FINANCIAL TIPS

201 INVESTING

SOCIAL SECURITY

RETIREMENT GOALS AGE <40

HEALTHCARE IN RETIREMENT



Q4 Targeted Action Campaign: Beneficiary

VOYA FINANCIAL

SAMPLE

Find time accessing your account?

- If you're a new participant, you'll receive a Personal ID in the U.S. mail. Your PIN is required to access your account. graham.bennedy@voya.com.
- Already enrolled and don't have a PIN? Call the toll-free number on your work email address, mobile number or your home address.

Questions? Your local VOYA financial professional is available.
 The Local-Global Group
 www.Local-Global-Group.com
 800.238.6281 or 800.547.3333
info@localglobal.com

Your investment adviser representative and register representative is through VOYA Financial Services, Inc. (Investor Service Center)

Neither VOYA nor its affiliated companies or representatives are soliciting or attempting to make a sale or investment recommendation.

Has FIDUCIARY STATUS? Beware! Not a Deposit of a Bank.
VOYA Financial Services, Inc. is not a bank and does not have FDIC insurance. VOYA Financial Services, Inc. is not a bank and does not have FDIC insurance. VOYA Financial Services, Inc. is not a bank and does not have FDIC insurance.

PLAN | INVEST | PROTECT

VOYA FINANCIAL

SAMPLE

November 2, 2013

Keeping your beneficiary designations current is a quick and simple way to make a big difference.

Dear Jane,

Designating beneficiaries for your Deferred Compensation Plan account can help you make sure that the assets you've worked hard to accumulate are passed on according to your wishes. If there's been a change in your personal situation, such as a marriage, divorce, birth of a child or the death of a family member, you may want to change your beneficiary designations to reflect your intentions. Generally speaking, it's a good idea to review them at least once a year.

As a result of our current, automated Designation Beneficiary Information update:

Plan number	Beneficiary name	Relationship	Beneficiary Type	Allocation (%)
664067	John Doe	Spouse	Primary	50
664067	Jane Doe	Spouse	Contingent	100
664067	Jason Doe	Son	Primary	100
664067	Jennifer Doe	Daughter	Contingent	100

As of 10/1/2013

Did you know that you can review and make changes to your beneficiary information any time? It's easy, simply log into your account at graham.bennedy@voya.com to do the simple steps listed to your name - select Personal Information > Beneficiary Information.

Beneficiary designation considerations include:

- designating an entity other than an individual may have implications on the IRS' requirements for distribution payments to beneficiaries. We encourage you to speak with a tax advisor before naming an entity as your beneficiary to help you understand the full implications of your decision.
- designating a loved one with special needs could have an unintended impact on his or her eligibility for government benefits. Please visit voya.com/beneficiary to learn more.

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Personalized letter

CLACKAMAS COUNTY Home Plan Information Resources Center Contact Us

Clackamas County 457 Deferred Compensation Plan

Log In
 Already enrolled in your plan? Log in to your retirement account.

Username *

Forgot Username? [\[?\]](#)

Password *

Forgot Password? [\[?\]](#)

[Log In](#) [Register Now](#)

Enrollment
 View all of the information you need to enroll.

Did You Know?
 There are many resources for you to make informed decisions on investing in your future.

Ditch the debt
 Did you know that you can review and make changes to your beneficiary information any time? It's easy, simply log into your account at graham.bennedy@voya.com to do the simple steps listed to your name - select Personal Information > Beneficiary Information.

[Messaging debt tips](#)

Website messaging

Don't forget to designate your beneficiary today. [beneficiary](#)

VOYA FINANCIAL

They need you to make a choice

Designate a beneficiary. Protect your loved ones.

You have not designated your plan's beneficiary yet. It is important that the savings you've accumulated are passed along to the right people. Please log in or register your account online immediately to designate your beneficiary and protect the people who matter most to you.

[Log In to your account at voya.com](#)

Select your name in the top right hand corner and choose Personal Information to designate your beneficiary.

Designating a beneficiary is easy. Don't wait. Do it today.

[Log In Today](#)

Naming a loved one with special needs as a beneficiary could have an unintended impact on his or her eligibility for government benefits. Learn more here.

Have a question?
 [?first_name] [?last_name] [?designation] [?designation] [?pin] [?pin] [?pin]
 Enter Email here
 Enter account ID

[f](#) [t](#) [in](#) [@](#)

Email

