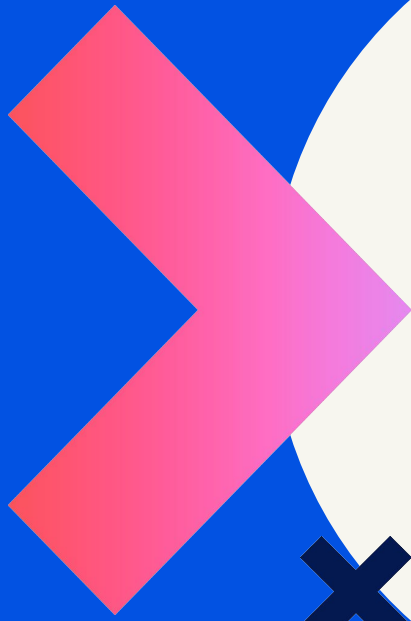




SUNDAYSKY
Customer Story

VIDEO AS A
GO-TO-MARKET
TOOL FOR
RETIREMENT
PLANNING



T. Rowe Price
INVEST WITH CONFIDENCE



A FINANCIAL SERVICES CASE STUDY

T. Rowe Price is a global asset management firm that offers retirement plans, investment funds, education savings plans, and more for individual investors and institutions.

In 2014, T. Rowe Price turned to SundaySky to bring personalized video into their investor engagement and communications strategy. The videos motivated plan participants to stay abreast of their retirement planning by delivering up-to-date, personalized information on their accounts and retirement goals.

More than a decade later, T. Rowe Price considers personalized video a competitive advantage and a critical tool in helping investors make timely account contributions to their retirement plans.



CHALLENGE: INSPIRE INVESTORS TO ACHIEVE FINANCIAL GOALS

T. Rowe Price faces a persistent challenge. A significant segment of well-informed Americans, and T. Rowe Price investors, know the importance of saving for retirement. But they aren't doing so, or they aren't saving enough. And many are hungry for retirement planning information and advice.

T. Rowe Price aims to guide these information-starved clients and counteract their retirement anxiety with better digital tools and communications. The firm manages the money, yet they know that the emotion behind the money is what drives investors to take action.

The financial institution sought to educate plan participants to encourage account contributions to their investment products – whether a retirement plan or a 529 college savings fund – and **guide them to the next-best action based on where the participant is on their financial journey.**

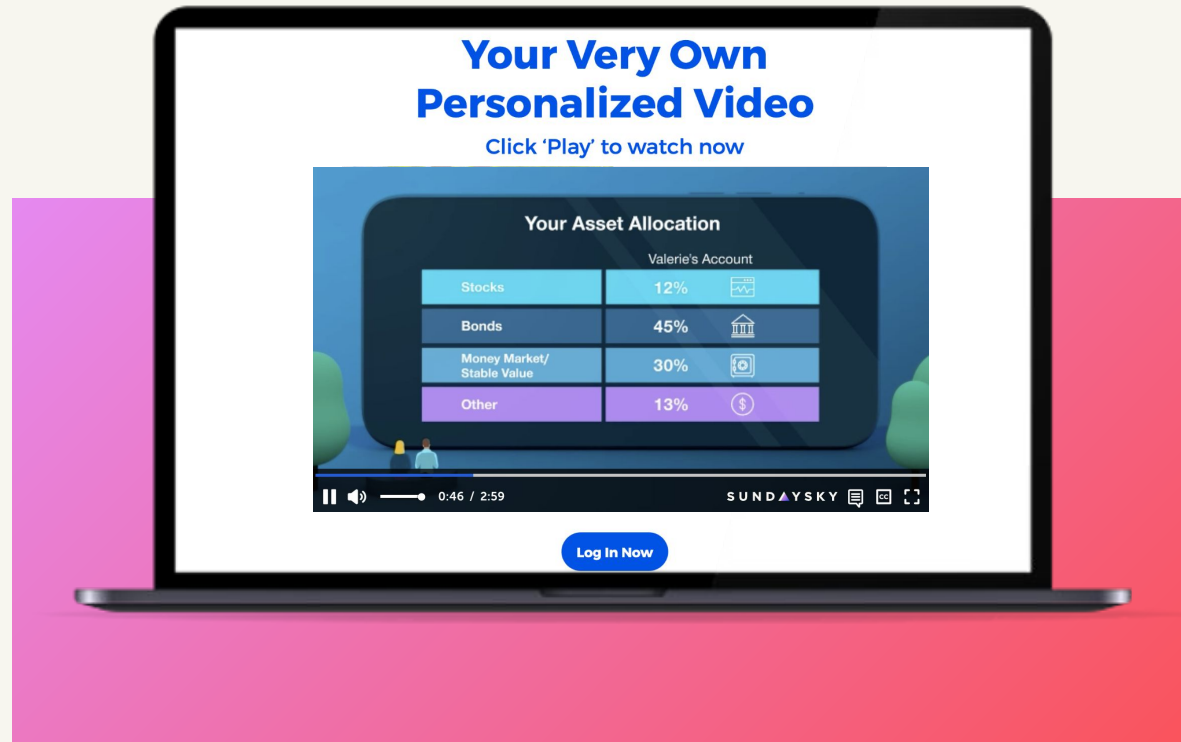


Given that health and wellness is highly personal, private, and complex, the Company needed to communicate an abundance of health information and resources efficiently, in a way that's easy for users to access and understand, and that can guide them toward healthy choices. Clients choose various solutions and service options to customize what they offer to employees.

Even though the Company serves businesses, its message and tools need to ensure end-user engagement in order to meet its clients' goals. The Company recognizes video as an important part of their platform and communication offerings.

They looked for a video solution that would offer personalization at scale that could grow with the company and offer unmatched value for their clients.

The Company wanted to improve client employer satisfaction and empower end-user employees with an enriched engagement experience by including video.



SOLUTION: USING PERSONALIZED VIDEO TO REDUCE RETIREMENT ANXIETY

T. Rowe Price delivers personalized video experiences at key moments throughout the investment journey, so participants see receive meaningful content they need to feel confident about their next steps.



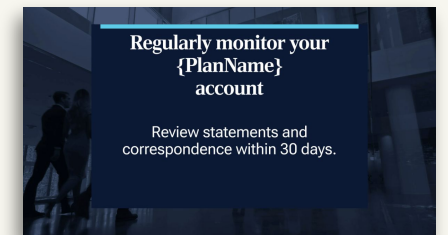
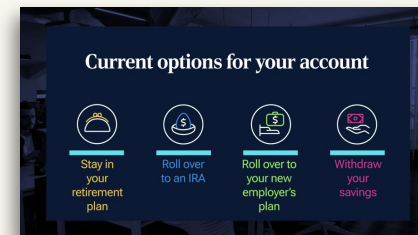
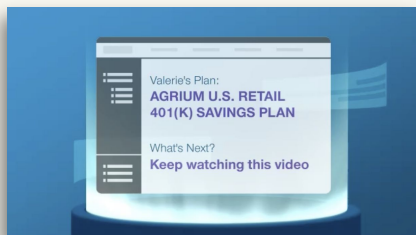
Onboarding

Contribution
education

Account check in

Distributions

Account security



Each video touchpoint offers account details that engage clients personally, offering not just information about retirement, but the most relevant and important action points for plan participants based on where they are in their retirement savings journeys. For example:

One video targets participants in the first six months after enrollment, encouraging them to take the next steps for success such as account contributions.



Another video offers personalized retirement income projections calculated along with situational suggestions.



Another highlights security measures in place for their account, with actions and settings the investor can take to feel safe and secure.



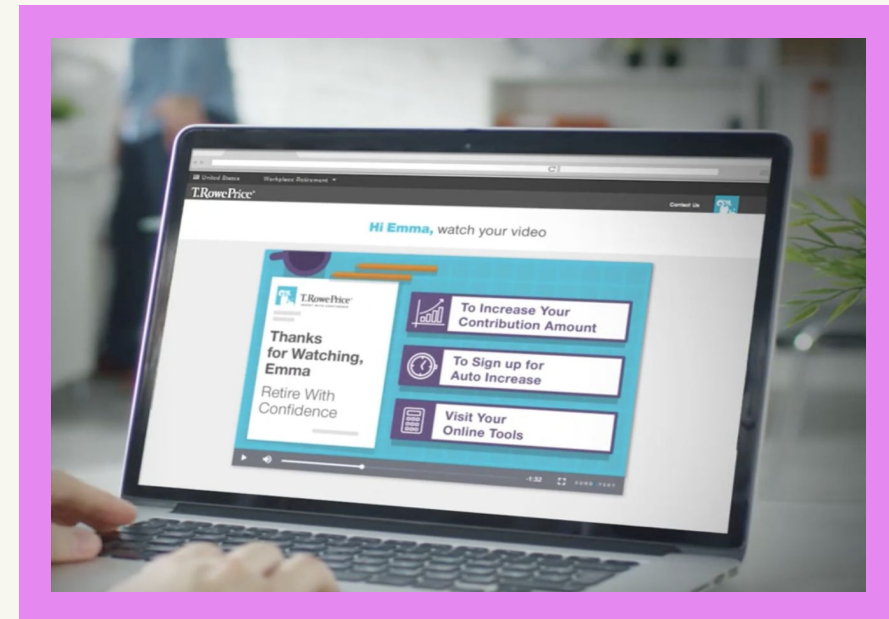
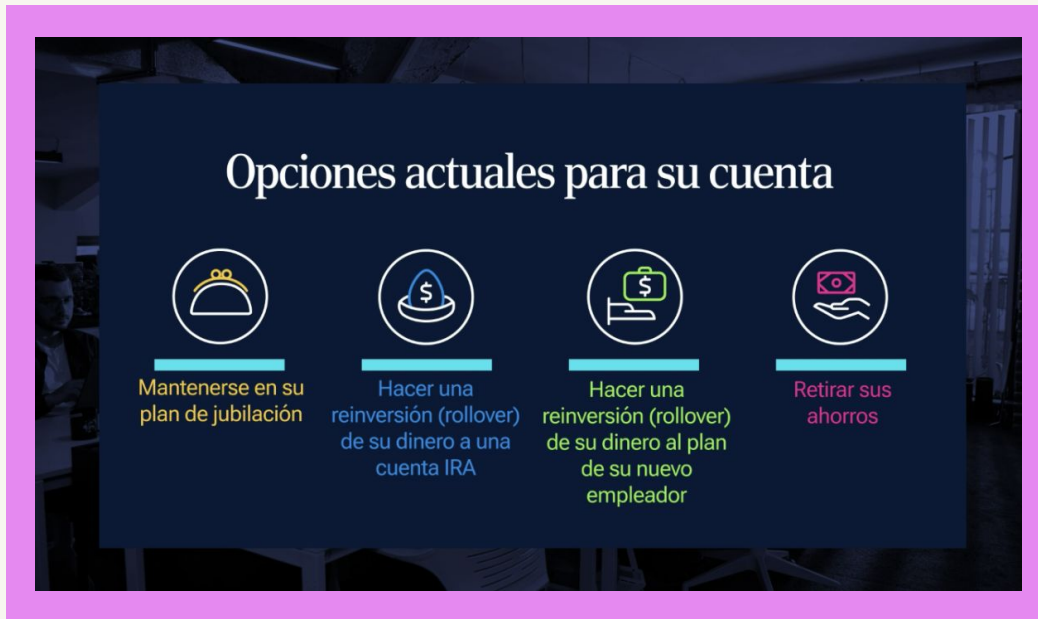
Safeguard your password

Last login: {Last Login}

Password updated: {Last Password Update}

SundaySky's AI voiceover capabilities allow for easy narration translation to Spanish in just one-click, and in-video interactivity allows for chaptering and personalized call-to-action (CTA) buttons.

Videos are delivered to participants when they login to their T. Rowe Price account portal.



IMPACT: PERSONALIZED VIDEO REDUCES RETIREMENT ANXIETY

By incorporating real-time data into engaging, personalized videos, the SundaySky platform has proven to motivate participants to take positive actions for their futures. Internal analysis showed participants who view the videos are more likely to complete the recommended actions and that they tend to be more engaged and interested in information overall.

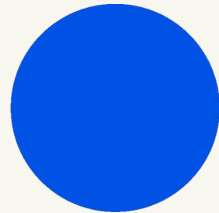
T. Rowe Price video viewers increased their salary deferrals and were more likely to complete a plan rollover from a prior 401K plan, opposed to non-video viewers. What's more, personalized videos prove to be helpful with 97% of viewers reporting usefulness.

"Those viewing SundaySky videos increased savings contributions 550% more than those who did not. Additionally, 97% of viewers reported that the videos were useful to them, and 92% said they positively affected their opinion of us."

Kirk Kness, Vice President of Emerging Solutions, T. Rowe Price

Source: [Forbes.com](https://www.forbes.com)

T. Rowe Price considers personalized video a competitive differentiator and a key element in its go-to-market strategy, one that consistently delivers high value, positive business outcomes, and heightens participants' confidence and motivates action.



Outcomes:

➤ VIDEO ENGAGEMENT

83% average view duration and **21%** average CTA button click-rate.

➤ BUSINESS IMPACT

Video viewers were **2.2x more likely** to make a discretionary deferral increase than non-viewers. **97% of viewers** reported that the videos were useful to them.

➤ AWARD-WINNING EXPERIENCE

T. Rowe Price's Account Check-In video was the **Platinum Winner** for the 2022 Viddy Award and the 2022 MarCom Award.

ABOUT SUNDAYSKY

SundaySky is the premier video platform for business, empowering teams to create and deliver videos faster, easier, and more personalized.

Our AI-powered platform instantly connects to your existing software, making video creation accessible, efficient, and impactful across every customer journey.

Growing brands and Fortune 500 businesses alike, including 1-800 Contacts, Aetna, Bank of America, Okta, Staples, T. Rowe Price, UnitedHealthcare, and many others, have adopted SundaySky to modernize the way they create, personalize, and share videos at scale.

LEARN MORE AT:
www.sundaysky.com

