

Your Mix Matters

Your Mix Matters: Agenda

- Campaign Overview
- Campaign Goals & Objectives
- Audience & Positioning
- Tactical Campaign Evolution
- Content & Design Campaign Evolution
- Campaign Execution
- Onsite Education Efforts
- Post Campaign Communications Support



Your Mix Matters: Campaign Overview

- Deploy passive re-enrollment campaign in Q214 into default investment option
- Campaign designed to:
 - Help Kohler associates who may be putting their retirement in jeopardy
 - Lower fees for Kohler Co. and associates
 - Maximize fiduciary protections
 - Clearly communicate campaign through a “no surprises” communications strategy
- In 2014, we transitioned from a standard Retirement Evaluation Campaign to a customized Investment Evaluation with supporting communications materials



Your Mix Matters: Campaign Goals

- **Overall Savings Plan Goal**

- To support Kohler associates in having the 401(k) assets that will provide the income they will need in retirement.

- **Your Mix Matters Communication Campaign Goal**

- To have full awareness among Kohler associates that they are responsible for making their investment decisions; Kohler provides the tools – they need to establish the optimal asset allocation to meet their retirement income needs.
- Specifically focus on content that's compelling, educational, and action-oriented.

Best Water Cooler Dialogue

Associates say thank you for making me see, understand, and be engaged.



Your future. Made easier.SM

Your Mix Matters: Audience & Positioning

Audience: Active and terminated Kohler administrative associates. Two manufacturing groups, Huntsville and Spartanburg, were included in the campaign as well.

	Individual Directed	PAM Users	60 or Older Income+
Overarching Position	<p>Two-pronged position that transitions from education to action.</p> <p>P1: Educates associates on the difference between saving and investing.</p> <p>P2: Addresses the importance of diversification and encourages associates to actively decide how they want to manage their mix moving forward.</p>		
Audience Segment Position	Know your asset allocation and time horizon are right	Reduced fees	Know your asset allocation will provide your income throughout retirement



Your future. Made easier.SM

Your Mix Matters: Tactical Campaign Evolution

Where We Started

- Campaign originally scheduled to kick-off in March with 4 direct mail pieces and 4 distinct audience segments (active <60, termed <60, active >60, termed >60)
- Campaign included 19 different communications elements

Where We Ended

- Campaign was deployed in June with streamlined communications approach, 2 primary audience segments, and a custom election microsite

Tactical Timeline

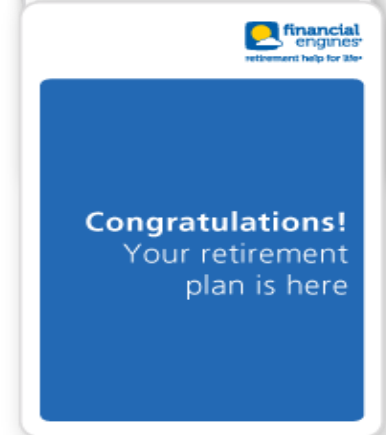
Jan.	Feb.	Mar.	April	May	June	July	Aug.
<ul style="list-style-type: none">• Project planning	<ul style="list-style-type: none">• Focus groups and concept testing for campaign positioning• Findings and strategy presented and approved	<ul style="list-style-type: none">• Create campaign wrap materials• YMM campaign materials provided• Custom election microsite development	<ul style="list-style-type: none">• Material development	<ul style="list-style-type: none">• Material development• Finalize campaign wrap materials	<ul style="list-style-type: none">• Wrap materials deployed• 6/20 YMM print Announcement• 6/25 YMM Email Announcement• 7/7 YMM Report Mailed• Onsite group meetings• 1:1 meetings	<ul style="list-style-type: none">• 7/18 On-demand webinar available• 7/28 TED Reminder mailer• Onsite group meetings• 1:1 meetings	<ul style="list-style-type: none">• 8/5 YMM Email reminder• 8/8 YMM Deadline• Welcome kits mailed• Schedule team debrief



Your future. Made easier.SM

Your Mix Matters: Content & Design Campaign Evolution

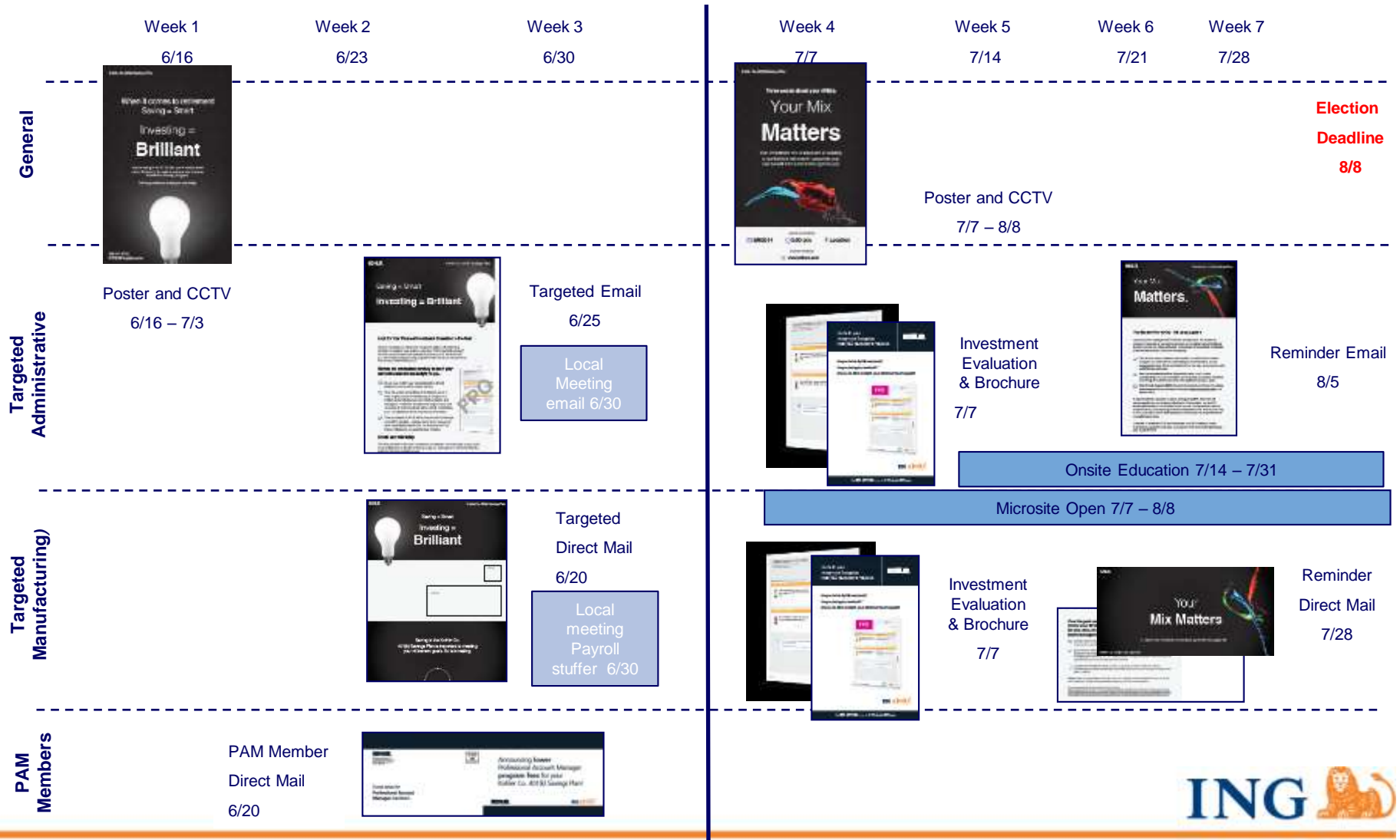
Over 5 design and 6 copy concepts considered...



Your future. Made easier.™

THE WINNER!

Your Mix Matters: Campaign Execution

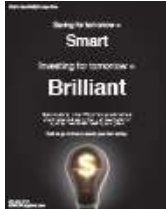


**Election
Deadline
8/8**



Your future. Made easier.™

Your Mix Matters: Campaign Execution



Item	Versions	Locations	# Printed
Phase 1 Poster	1	13	343
Phase 1 CCTV Phase 2 CCTV	1	5 5	---
Phase 1 Mailer	1	---	Print: 2,542 e-Delivery: 2,793 Total: 5,335
Payroll Stuffer	4	5	1,127
Phase 2 Poster Phase 2 Flyer	13 7	14 7	98 85
Phase 2 Mailer	1	---	Print: 2,465 e-Delivery: TBD Total: TBU



Your future. Made easier.SM

Your Mix Matters: Campaign Execution

- Created custom, campaign-branded election microsite
- Site built with decision tree logic, provides access to tools and resources
- Accessible to Kohler associates and ING Advisor Representatives
- Generates campaign confirms

ING Advisor Service to provide update on microsite activity.



Your future. Made easier.SM

Your Mix Matters: Onsite Education Efforts

Overview

- 5 onsite education specialists dedicated to this effort, 3 bilingual (Spanish)
- 79 group meetings and several 1:1s scheduled at 14 locations from 7/15 – 7/31
- On-demand webinar went live on 7/18 with 162 unique views as of 7/23

Results to Date (as of 7/23/14)

Onsite Specialist	Locations	Attendance	Notes
Gordon	5	300	<ul style="list-style-type: none">• High attendance at Bristol PA, High Point NC, and Connelly Springs, NC likely due to good scheduling
Bill	1	24	<ul style="list-style-type: none">• Primarily general campaign questions
Tom	2	136	<ul style="list-style-type: none">• No associates attended Huntsville meeting• Specialist held impromptu 1:1 meetings
Alfredo	1	26	<ul style="list-style-type: none">• Spanish speaking rep requested, no Spanish speaker inquiries
Britny	1	3	<ul style="list-style-type: none">• General questions on the Plan
Totals to Date	10	489	



Your Mix Matters: Post Campaign Communications Support

- Welcome kits mailed, ongoing support provided to PAM members
- Special considerations given ING to Voya rebrand effective 9/1
 - Updated briefing notes to Kohler HR Specialist
 - Updated script to phone advisor group
 - Recommend we make the webinar available through the end of October with updated introductory messaging about advice name change
 - Consider second targeted web message for all associates who actively use advice



Mix Matters Response: 6/19/14 – 8/15/14

as of 8/22/14

Investment Evaluations Mailed = 5,217

- **Engaged via microsite: 1,844 (35%)**
 - 134 enrolled via microsite
 - 1,710 elected Self-Management
 - 1,419 (83%) Indicated they *would not* make changes
 - 291 (17%) Indicated they would make changes
- **Advisor Mix Matters Calls*: 448 (8%)**
 - 297 Chose Self-management via Advisor
 - 151 Personalized and Enrolled Immediately
- **84 First time Online Advice Adopters (1%)**
- **Default Enrollment: 2,984 (56%)**
 - Default Assets Under Management: \$174,877,287

Total Campaign Response Rate = 100%

Active Engagement = 43% || Passive Engagement = 57%



*Mix Matters campaign calls to Investment Advisors = 503, 297 chose self-management, 151 enrolled, 55 took no immediate action.

**First time Online Advice Adopters refers to participants who accepted the Investor Services Agreement.