

CalSavers Retirement Savings Board Meeting

Wave 4 Campaign Strategy

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Jonathan Herrera,
Director of Strategic Stakeholder Engagement and Customer Experience, CRSB

Martha Nemecek,
Director of Institutional Relationship Management, Ascensus Government Savings





Campaign Goals

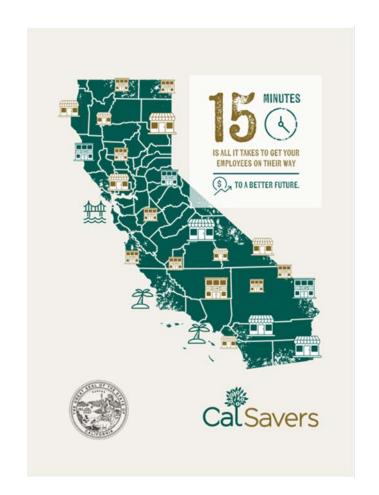


- **1. Build awareness among newly mandated employers,** targeting a 50% email open rate, 5% click-through rate, and 75,000 new landing page visitors by May 31, 2025. Track postcard engagement via vanity links and QR codes aiming for a 5% conversion rate.
- **2. Ensure employers understand** the importance of early registration and the responsibilities involved in facilitating CalSavers. Track anecdotal feedback from interactions with field representatives and board staff.
- **3. Achieve a 33% overall response rate** (registrations and exemptions) by September 22, 2025, aligning with the 100-day countdown to the December 31, 2025 deadline and the start of mandate-driven communications.
- **4. Maintain engagement,** ensuring over 75% of registered employers have uploaded employee rosters by September 22, 2025.

Vintage California Theme









Communications Plan





- Custom landing page and public web updates as needed
- Kick-off and quarterly emails
- Targeted territory-based campaign
 - Emails for employers with email on file
 - Postcards for employers with no emails on file
 - Geo-focused paid search and social media posts
 - Local stakeholder engagement
 - Promotional items for CalSavers outreach and AGS Field teams

	2024					2025						
Торіс	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July
TEST: Territory based communications												
Territory based communications												
Kick off email												
Quarterly email												



Targeted, Territory-Based Campaign





Areas (Counties, unless noted otherwise)
Los Angeles, Cities A-L
Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma
San Diego, Imperial, San Bernardino and Riverside
Alpine, Amador, Butte, Calaveras, Colusa, Del Norte, El Dorado, Fresno, Glenn, Humboldt, Inyo, Kings, Lake, Lassen, Madera, Mariposa, Mendocino, Merced, Modoc, Mono, Monterey, Nevada, Placer, Plumas, Sacramento, San Benito, San Joaquin, Santa Cruz, Shasta, Sierra, Siskyou, Stanislaus, Sutter, Tehama, Trinity, Tulare, Tuolumne, Yolo and Yuba
Los Angeles, Cities M-Z
Orange, San Luis Obispo, Santa Barbara, Ventura and Kern

Targeted, Territory-Based Campaign





	Flight Order	Field Team Coverage Leads				
Region	Campaign Date	# of ERs	1st Lead	2nd Lead	3rd Lead	
Out-of-State	August 2024	37,898	Shayne	Rita		
LA 1 (Cities A-L)	October 2024	74,368	Martha	Anita	Carlos	
Bay Area	November 2024	77,235	Rita	Shayne		
SoCal 1	February 2025	69,905	Carlos	Martha	Anita	
NoCal / Central	March 2025	59,717	Shayne	Rita		
LA 2 (Cities M-Z)	April 2025	52,885	Anita	Martha	Carlos	
SoCal 2	May 2025	66,296	Carlos	Martha	Anita	

Field Team





- Outreach to newly registered employers to ensure they "get it right the first time"
 - Access to one-on-one meeting with their local field team member to discuss program implementation and next steps
 - o Provide tools, tips and templates
- In person and virtual employee presentations
- Portal demonstrations
- Helping employers work with their accountants, bookkeepers and external payroll providers.
- Gathering employer quotes, testimonials to highlight employer experience
- Secondary and third territory leads to ensure availability





Outreach and Customer Service Team





Powered By Partnerships

- Engage local Stakeholders to help us spread the word.
- Coordinate timing with stakeholders to ensure that employers hear from their local organizations simultaneously with the delivery of emails, postcards, targeted ads, and social media posts from the program
- Leverage a campaign specific toolkit to encourage stakeholders to
 - Distribute communications materials like email blasts and webinar flyers
 - Interact with our social, post their own
 - Cohost events with us or encourage members to join our standing webinar series
- Support employers with escalated inquiries and requests for special exemptions (ie closed businesses and categorically exempt)
 - Support the field team and client services anyway we can. Deploy staff, escalated service issues, etc.



Thank you



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