TOPPAN
TOPPAN MERRILL

TOPPAN MERRILL CONNECT™ ("CONNECT") STOREFRONT

A global financial services company partners with Toppan Merrill to seamlessly execute detailed, time-sensitive, personalized and targeted Retirement Plan proposals.

The Company, a leading provider of Retirement Plans, supports a vast network of Retirement Plan Advisors, which requires easy access to a system that can seamlessly execute detailed, time-sensitive, personalized and targeted Retirement Plan proposals. The Company's previous vendor could not manage the daily volume of orders for customized and personalized Retirement Plan proposals. Field offices were constrained by focusing their efforts on manual assembly of orders to ensure delivery times on important proposals. The Company also needed an easier ordering system that allowed for variable products in variable formats, depending on the audience, while continuing to ensure compliance timelines were met.

50+ years' experience
successfully navigating regulated industry

Challenge

The Company needed a partner who could develop a portal for variable items to be selected at the time of ordering as well as accommodate for customized files, uploaded by the order administrators to flow through to a digital print area and collate into a final product. This all needed to happen within an easy-to-administer ordering portal, while maintaining compliance, quality and on-time delivery.

Results

Toppan Merrill Connect Storefront is the answer. Toppan Merrill provided the Company a front-end portal, built on Connect, the industry-leading marketing communication portal used by leading financial services companies. The Storefront solution provided a high level of customized options to Plan Advisors, filtering options for content by the individual plan advisor, and Cost Centers to allow access of specialized materials. The new system allows Plan Advisors to select a plan proposal type, select recipients, upload custom documents specific to that plan proposal, and seamlessly assemble the entire document. The system allows up to 60 predetermined pieces, and the Advisor can make changes on the fly. This system was set up with the ability to ensure compliance pieces were included within each proposal order by noting which materials were optional or mandatory. Storefront was able to collect cost centers at the time of order which allowed The Company to process invoices easily. This streamlined all manual processes and provided traceability for all orders within one user-friendly website.

Toppan Merrill secures solutions at every phase, so you can secure ongoing impact and growth.