

International Financial Services Company Develops BlackBerry PlayBook App to Help Increase Group Retirement Enrolment

Sun Life Financial Inc. (Sun Life) is a leading financial services company offering protection and wealth accumulation products, such as pension plans, group benefit plans and insurance, to both individuals and corporate clients.

Approximately 15,000 employees work in several countries around the world, including the United States, India, China, UK and in their corporate headquarters in Toronto, Canada.

Over and above personal retirement plans, Sun Life offers Group Retirement and Group Benefits programs where employers can match a certain percentage of the employees' retirement contributions. To educate employees about this offering, large corporations would routinely ask Sun Life to provide an enrolment session for its staff. Trainers would travel to customers' offices to explain the financial benefits of joining a group retirement plan and send the employees off with paper forms or a web address to submit their information at another time.

"Despite their interest during the training session, once people left the room for their desks, our findings showed that only 10 percent would actually fill out the forms," said Jim Skipper, Chief Architect at Sun Life Financial Inc. "We had a paper solution and we had a web-based solution, but those weren't making a difference. We knew we needed to find an easy and user-friendly way to get people filling out the forms before they walked out the door."

With the emergence of tablet technology, executives at Sun Life decided to develop a custom application so their clients' employees could complete the group retirement plan enrolment forms during the education sessions. The Company decided to partner with Research In Motion Limited® (RIM®) to pilot the new application on the BlackBerry® PlayBook™ tablet. "We chose the BlackBerry PlayBook because it meets all of our business and technology needs," said Skipper. "Our company VPs like the PlayBook because it's compact enough to be truly handheld."



"Thanks to the BlackBerry PlayBook, we believe we'll be able to more than triple enrolment in our group retirement plans – we've already won new business, attracted new talent and reinvigorated our current employees thanks to our BlackBerry solution."

Jim Skipper,
Chief Architect, Sun Life Financial Inc.

"Our application developers like it because it supports Adobe® Flash®. And I like it because of the security model." Sun Life was already using the BlackBerry® Enterprise Server and has more than 5,000 BlackBerry® smartphones deployed company-wide.

Sun Life's in house developers created GRS Wireless Enrolment, a custom application for the BlackBerry PlayBook tablet that uses Adobe Flash. The application is designed to provide a wireless and secure way to enrol in a group retirement plan while employees are still in the room with the trainer. While the trainer explains the benefits and walks employees through enrolment, the application navigates users through up to 30 screens to complete the sign-up process. As the session progresses, the trainer can view each employees' progress on a dashboard. If the trainer sees that certain users are lagging behind or stalled completely, she can focus her attention on helping those particular individuals. Once a user clicks "submit," then the data is transmitted wirelessly and securely to Sun Life systems for processing.

 **BlackBerry** PlayBook.



During the pilot project, 35 BlackBerry PlayBook tablets were deployed in-house and tested by Sun Life employees in mock group retirement plan training sessions. In labs of 25 participants, employees test the application and the PlayBook tablet for response time, ease of use and scalability. "Sun Life employees who have had the opportunity to test out our BlackBerry solution are thrilled – they love it," said Skipper. "They are telling us that it is intuitive and easy to use." For the initial launch of the program, up to 1,000 BlackBerry PlayBook tablets will be rolled out to more than 35 Sun Life trainers.

"Initially, we had traveled fairly far down the road with developing our application for another tablet," said Skipper. "But we were disgruntled about the growing costs – what's more, its physical size was too cumbersome and its functionality did not meet our needs. With the BlackBerry PlayBook tablet, we got a truly handheld device. The flash capabilities, improved security and the ease of two-finger typing makes this the ultimate solution for our education sessions."

The ability to sign-up for a plan in near real time, with the assistance of the trainer, helps Sun Life improve the take-up rate of their second tier retirement plans. Based on industry research, Sun Life projects that group retirement enrolment will jump from 10 to 75 percent. **"It sounds crazy, but we're looking at the possibility of a 300 percent return on investment as we roll out our BlackBerry PlayBook solution," said Skipper. "And believe it or not, those estimates are conservative."** Skipper believes that this return is due in large part to the application's ability to help trainers pinpoint those in the room that need help – before they walk out the door.

www.blackberry.com/go/success

www.blackberry.com/playbook

Additionally, Sun Life's decision to embrace new technology has given the company a boost in reputation, both inside and outside the organization. "Thanks to the buzz around our BlackBerry PlayBook application, our employees are reinvigorated, our ability to recruit top talent has improved and we've won new business," said Skipper. "Even if our enrolment rate doesn't reach our projections, our BlackBerry solution will still be one of the most successful programs that Sun Life has undertaken in recent history."

The pilot project has been so successful that other areas of the business are looking into implementing a similar solution. "A custom BlackBerry PlayBook application for the sales staff is the obvious next step," said Skipper. "Some individuals find it intimidating when one of our sales staff pulls out their laptop at the kitchen table. The BlackBerry PlayBook tablet gives them a neat, easy and unimposing tool to sign customers up on the spot."

Key Benefits:

- Potential increase in profits
- Positive customer and industry reaction
- Motivate and reinvigorate existing staff
- Created a boost in recruitment



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