



CalSavers Retirement Savings Board Meeting

Wave 4 Campaign Strategy

August 21, 2024

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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



15 MINUTES
IS ALL IT TAKES TO GET YOUR
EMPLOYEES ON THEIR WAY
TO A BETTER FUTURE.

CalSavers

CalSavers Cal Savers Promoted

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WORKERS ARE
15X
MORE LIKELY TO SAVE FOR
RETIREMENT IF THEY HAVE ACCESS TO A
PAYROLL DEDUCTION
SAVINGS PLAN AT WORK

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NEARLY
50%
OF CALIFORNIANS
LACK ACCESS TO A RETIREMENT
SAVINGS PLAN AT WORK



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						
Topic	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



Region	Areas (Counties, unless noted otherwise)
LA 1	Los Angeles, Cities A-L
Bay Area	Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma
SoCal 1	San Diego, Imperial, San Bernardino and Riverside
NoCal/Central	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, Siskiyou, Stanislaus, Sutter, Tehama, Trinity, Tulare, Tuolumne, Yolo and Yuba
LA 2	Los Angeles, Cities M-Z
SoCal 2	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
 - 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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RETIREMENT SAVINGS PROGRAM