

# Prudential Retirement Case Study

Building thought leadership  
with LinkedIn polls



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*“With interactive polls, we’re sending a message that Prudential Financial listens to American workers, and wants to guide conversations about their retirement needs. LinkedIn provides the right combination of social media tools and engaged professional members – which all come together to help us reach our thought leadership goals.”*

Kara Segreto  
Chief Marketing Officer, Prudential Retirement

## Taking the pulse of retirement plan participants

Prudential Retirement, a business unit of Prudential Financial, offers retirement plan solutions for public, private, and nonprofit organizations. In recent years, the financial services company has focused resources on engaging plan participants and their employers in dialogues about retirement planning.

“We’re working to stay closely aligned with the wants and needs of our retirement plan participants, since this knowledge helps us create the retirement products they need,” explains Kara Segreto, chief marketing officer for Prudential Retirement.

In advance of National Save for Retirement Week, which took place in October 2011, Prudential Retirement looked for a new way to gauge current sentiments of people saving for retirement, particularly in the wake of a couple of years of market volatility.

## Challenge

- Reaching retirement plan participants and sponsors
- Creating conversations about retirement planning
- Building a reputation as an industry thought leader
- Gathering insights in a short timeframe

## Solution

- Created LinkedIn poll
- Targeted retirement plan participants and sponsors
- Currently using poll results and comments to guide product development

## Why LinkedIn?

- Highly engaged, professional membership
- Precise targeting helps businesses reach the right audiences
- Interactive features encourage conversations between businesses and members

## Results

- More than 11,000 poll responses
- More than 230 comments from LinkedIn members
- Poll feedback improves product development
- Greater awareness of thought leadership position

The company had previously developed white papers and surveys that highlighted consumer attitudes toward retirement financial tools and strategies, but the content and data for such projects took months to compile, and didn't offer the opportunity for meaningful conversations with Prudential customers.

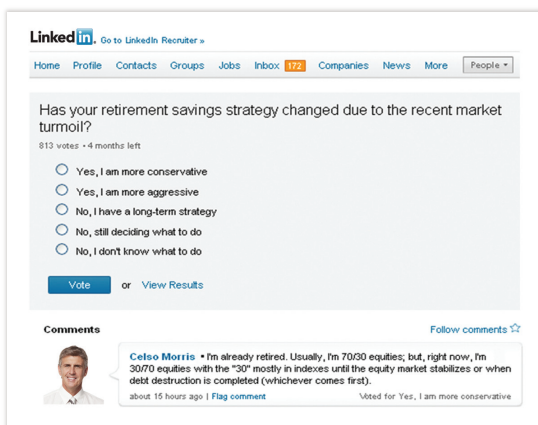
For the first time, Prudential Retirement decided to use social networking to gather these insights, using them to drive development of white papers and to raise awareness of the company as a thought leader in the financial services market. A closed LinkedIn group for plan sponsors, created prior to a Prudential Retirement conference, allowed the company to test some techniques for interacting with key audiences using polls.

## Poll generates targeted, interactive results

"We were excited about the speed at which we could get insights from retirement plan sponsors with polls," Segreto says. "We decided to create a more widespread poll that would dig deeper into participants' concerns about how market conditions were affecting their retirement strategies."

Using LinkedIn's targeting capabilities, Prudential Retirement used ads to promote the poll to employees at companies with at least 1,000 employees, as well as plan sponsors – for instance, human resources and benefits executives. The poll's nine questions addressed concerns about the market's impact on their retirement plans, their satisfaction level with their current plans, and their interest in guaranteed retirement income products.

During the seven weeks that the poll was active, more than 11,000 LinkedIn members responded, including professionals in finance, human resources, sales, and operations. In addition, more than 230 LinkedIn members commented on the topics raised in the poll, particularly questions about how retirement plans could be improved.

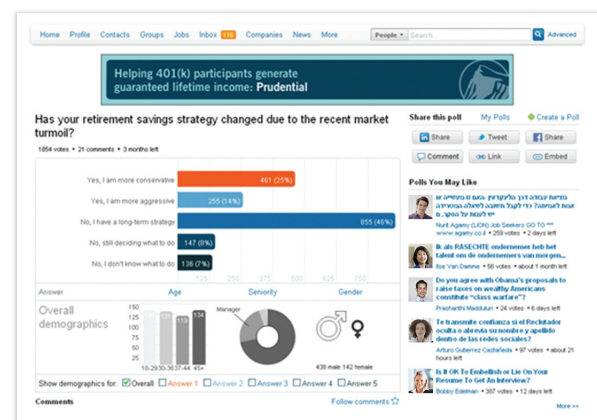


Retirement planning poll on LinkedIn

## Conversations raise thought leadership profile

According to the poll, 46% of respondents did not change their long-term retirement strategy even in response to uncertain market conditions, while 25% said they had changed to a more conservative retirement planning strategy. In addition, more than 50% of respondents said they were very interested in guaranteed retirement income products, and 23% percent said they were somewhat interested in these products. This was valuable data for Prudential Retirement, since guaranteed income products are significant for the business.

"Not only did we receive answers to our specific questions, but we started a conversation with people whose opinion we value," says Segreto of the discussion that resulted among LinkedIn members. "The responses we collected will help guide how we develop future products and services. It's an incredibly fast and impactful way to tap into the consumer mindset about retirement planning."



Retirement planning poll results on LinkedIn

The ability to target LinkedIn members in specific demographic groups also helped Prudential Financial reach a relevant audience. "We would never have been able to access so many retirement plan participants – not just those in a Prudential plan, but across the market – in such a short timeframe," Segreto says. "Normally we'd have to ask permission of employers to poll their plan participants. LinkedIn lets us introduce ourselves to a highly professional audience that is receptive to our questions and our marketing messages."

The retirement poll has also set the stage for future social media campaigns with customers. "With interactive polls, we're sending a message that Prudential Financial listens to American workers, and wants to guide conversations about their retirement needs," Segreto says. "LinkedIn provides the right combination of social media tools and engaged professional members – which all come together to help us reach our thought leadership goals."

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