



ShareBuilder 401(k), a subsidiary of ING Bank, leverages online technologies to help make retirement benefits easy and affordable for small businesses. Stuart Robertson, General Manager, felt it was imperative to 'put a human face' on ShareBuilder's on-demand 401(k) offering by highlighting the successful experiences of its fast-growing and diverse base of customers.

“ Four or five case studies are a nice marketing piece - but when prospects see 15, 20, or more of your customers sharing their success stories, they understand your commitment to them. That makes a difference. If you need help with your testimonial programs, talk to Altitude Management today.”

STUART ROBERTSON,
GENERAL MANAGER
SHAREBUILDER 401(K)

Contact us today
to discuss what
Altitude can do for
your company.

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Customer Success Story:

shareBUILDER 401K™

Challenge: Overcoming Prospect Concerns

- Stuart needed to show prospects that ShareBuilder 401(k) is truly easy to administer and get their employees started online
- Highlighting authentic customer experiences was essential to helping many prospects feel confident in moving forward
- He wanted to connect with prospects by demonstrating that ShareBuilder's online 401(k) services were designed for small business owners 'just like them', not just tech savvy businesses
- Stuart was looking for a way to communicate ShareBuilder's commitment to providing exceptional service to its customers and ensuring their success

Solution

- ShareBuilder contracted Altitude Management Inc. to develop a set of 15 'Customer Success' case studies
- Altitude recruited participants from a list of satisfied ShareBuilder customers, based on recent customer survey results
- To maximize the ability of prospects to relate to the case studies, participants were recruited from a diverse set of industries, locations and company situations
- Customer logos, photos and quotes were included in each study to enhance the connection with other business owners
- Each participant signed a legal release granting ShareBuilder the right to publish their story for its marketing purposes

Results

- 17 'Customer Success' case studies were developed. It was amazing to see the ease and willingness of customers to share their experience
- On the web and via the sales team, prospects are presented with real stories of small business owners they can relate to - who experience success with their ShareBuilder 401(k)
- The case studies help prospects overcome their initial hesitation to work with an online financial provider
- Stuart is re-using content from the case studies to incorporate the 'voice of the customer' into other marketing initiatives