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DALBAR Recognizes Retirement Plan Providers with Superior Mobile Enrollment Experiences

(Marlborough, MA, 6/22/22) [DALBAR](#) concluded its 2022 review of mobile retirement plan enrollment experiences on both mobile optimized sites and apps. Congratulations go to the five highest scoring experiences:

- John Hancock Retirement (Guided)
- Securian
- Voya Financial
- Principal
- John Hancock Retirement (Express Enroll)

John Hancock Retirement's top scoring Guided enrollment process offers maximum ease with the inclusion of retirement profiles to assist enrollees in determining the income replacement level most appropriate for them.

"An easy enrollment process is foundational for engagement and having a robust mobile experience helps us interact with participants at any time and any location," said Jack Barry, vice president, product development, strategy, and transformation, John Hancock Retirement. "Guided enrollment is the best first step to taking action in a new retirement plan. With our digital experience, we are seeing significantly higher initial contribution rates over paper, reinforcing the guidance is helping."

Securian's #2 ranked mobile experience presents myriad planning tools placed where most relevant, including a less seen "dollar to percent" tool that enables enrollees to seamlessly calculate a contribution percentage once they have identified the dollar amount they would like deducted from their paycheck.

#3 ranked **Voya** makes it easy for users to enroll right from the start, setting smart defaults and savings rate choices in the context of participants future ability to generate a paycheck in retirement. The site also allows individuals to sign up for rate escalation as part of the enrollment process.

In the 4th position, **Principal's** mobile enrollment experience offers rollover support that stands out due to its inclusion within the enrollment process itself, rather than as a separate task to be completed after the fact. The seamless method of implementation makes it feel like a natural step that one should automatically complete when opting into a new retirement plan.

The 5th ranked mobile process, **John Hancock Retirement's** Express Enroll, quickly and effectively gets employees into their plan, without sacrificing information accessibility. Multiple pre-built packages are offered, each with a boldly specified contribution rate, the exact dollar amount of that rate based on the provided salary, as well as linked details on the default investment option.



For more information about DALBAR's State of the Industry: Mobile Enrollment study, please visit the [DALBAR Intellect store](#), or email DALBARIntellect@dalbar.com.