

D S T O u t p u t C u s t o m e r S u c c e s s S t o r y



Horace Mann, a Leading Provider of Financial Services to the Education Industry, Chooses DST Output to Enhance its Customer Communications

THE BUSINESS CHALLENGE

For Horace Mann, selling into the education industry is a two-phase process. First, busy administrators, eager to satisfy educator needs, must be convinced Horace Mann is capable of selling and managing accounts flawlessly. Next, an incredibly diverse universe of educators must be satisfied. Many of Horace Mann's first-time annuity investors need education in retirement planning and risk management, while more experienced investors look to them for quality products and fast response to inquiries.

In mid-2001, Horace Mann recognized that to earn the confidence of all their clients they must provide new value-added services such as:

- Education about annuity investment options
- Advice on investment strategies like dollar cost averaging
- Proactive communications to keep them well-informed, and to counter concerns or misinformation they might encounter in the market place
- Periodic portfolio adjustments to balance risk

Rapid advances in print and electronic communications technology, and increasing competition for every investment dollar, were causing companies everywhere to evaluate their own in-house customer communications operations. As a leading provider of insurance products in the education industry, Horace Mann was no exception. To compete more effectively, managers at Horace Mann knew they needed to provide more responsive, more customer-intimate service. Their goals were to build client loyalty, long-term outlook, confidence and understanding—all needed to weather tough times in the market place—and increase account retention.

Horace Mann made the decision to seek external assistance for three reasons: limited internal IT resources, the high cost of overhauling their legacy systems, and the need for fast implementation.

THE SOLUTION

Company managers reviewed several companies, singling out DST Output. A large group of senior managers at Horace Mann agreed that DST Output offered far more than technological expertise. Here's what two said:

"We chose DST Output because they had the best products, services and a very knowledgeable staff, but more important," continued Paul D. Andrews, Vice President, Client Services Division, "they listened to our business needs and understood our strategic vision. They did this through a strong partnering with our company. The end result was that we have a strategically aligned product, not just a printing solution."

"They thought outside the box, projecting great confidence," said Jim Yale, Vice President, Client Relationship and Services.

DST Output's first task for Horace Mann was to improve their quarterly statement mailed to 140,000 annuity customers. "We added progressive features like personal portfolio performance," said Kirk Waldon, DST Output Senior Director. "Our aim," added Waldon, "is to make all Horace Mann communications clear, concise and meaningful. Using print-on-demand technology, for example, we always provide investors with fresh materials that feature the most current market information possible. This builds confidence among investors and promotes cross-sales of Horace Mann products."

"Horace Mann managers have reiterated to us that they have been particularly pleased with our quality control and responsiveness," said Michele Walter, Manager of Client Services.

ABOUT DST OUTPUT

DST Output is a leading provider of integrated print and electronic customer communications solutions. We create customer communications that strengthen the relationship between our clients and their customers. By integrating advanced customer relationship management techniques, we help the world's leading businesses create lasting, profitable relationships with their customers.

ADDITIONAL INFORMATION

To learn more about how DST Output can help you build profitable relationships with your customers, call 800.441.7587, or visit our Web site at www.dstoutput.com.



making customer connections count