



# TPAS: USING WHITE PAPERS AND CASE STUDIES IN YOUR MARKETING

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Want plan sponsors to appreciate the value you bring to their plan's administration? Not sure how to best communicate that value?

Have you ever considered using white papers and case studies tailored to your firm's products and services as part of your marketing campaign?

A **white paper** is a special report 6-10 pages long that lays out the benefits of hiring a good TPA and what a TPA brings to the table for a plan sponsor. A **case study** is a client success story of approximately two pages that tells the story of a problem one of your clients had, how you solved it, and how happy that client now is with your services.

Want to know more?

### **White Paper**

A white paper is an extensively researched report that would focus on why plan sponsors need a knowledgeable TPA. It highlights problems plan sponsors have, solutions they may have tried that haven't worked very well, and a generic solution they may not have considered before—a solution that you offer. This can take anywhere from 6-10 pages, usually with charts and graphics, plus cover and endnotes. White papers tend to be expensive, but have a long life.

White papers can be used to show your special expertise in your nook in the retirement plan world. Just what do you do that makes you special, so special that plan sponsors will select you as their TPA over your competition? White papers are used extensively in the technology and software industries...why not the retirement industry?

White papers can be an important marketing tool in your arsenal. While the main purpose to have one may be to generate leads, there are a number of other benefits:

- **Education.** A white paper educates its target market—plan sponsors—as to a TPA's value, how best to use a TPA's services and why it's important to collaborate with a TPA who knows the

importance of understanding and complying with plan and governmental provisions. As you do.

- **Leads from your mailing list.** Do you offer a free newsletter for visitors to your website? What's your conversion rate of sign-ups? Offering a white paper as a free resource will increase that conversion rate, and enable you to start a conversation with your visitors.
- **Thought leadership and branding.** A white paper can easily establish you as a thought leader in the retirement field. It shows you understand the problems plan sponsors face and have the solutions to solve those problems. Plan sponsors are looking for expertise (or at least they should be). A white paper shows them the expertise they need for retirement plan administration and points them in your direction. And while a white paper isn't a sales brochure, it does include a short description about your company at the end of the paper and encourages readers to contact you for additional information.

Want to attract those plan sponsors, advisors and CPAs to your business? Cut down the lead time of getting a new service to market? Try a white paper.

### **Case Study**

Unlike a white paper, a case study is short, usually only about two pages long. It's a story about the success you've had with solving a problem (usually a big one) that one of your clients had. It highlights the problem, the client and finally the solution. The case study includes an interview with the customer and usually a photo. Remember the adage, "A picture is worth a thousand words"? A case study is a picture in words—a picture of a happy customer. It tells a story about your brand and its worth. People naturally connect with stories.

Case studies shorten your sales cycle, open doors to bigger accounts. Moreover, they help you achieve your sales, marketing and PR goals faster. After all, who doesn't like a good story? So while some of your plan sponsor clients may at first be reluctant to put their name out there, in the end, it's a win-win situation for them as well.

Consider these benefits:

- **Sales.** Since they're used as sales pieces, case studies are geared toward you and your retirement plan sponsor target market. They highlight your product and service offerings and how you solve problems.
- **Branding.** Case studies are authoritative and illustrate your expertise as a retirement plan TPA. They highlight your customers' experiences and provide proof of real-life events. After all, studies show that the vast majority of online consumers look at product reviews before buying. A case study is your product review.
- **Problem-solving.** Case studies show the inner workings of how problems are solved in real life. They back up your claims that you can provide solutions to your plan sponsors' administrative and compliance problems. Potential clients often want to know not only that you can keep their plans in compliance but how you can fix them if problems arise.

Want to show plan sponsors why they need a knowledgeable TPA as their partner and what that TPA can do for them? Try a case study.

Add one or both of these marketing tools to your toolbox and see how your marketing results improve.