From print to emails to microsites — now you can create and manage all of your data-driven communications from one platform, without custom software development.
The Appo System is a platform for marketing departments to create and manage their data-driven communications. It eliminates the need for document programming and is the only single platform that integrates the creation and management of print, email, and microsite communications.

Appo System Saves Time and Money

In the past it took many months to program and test your data-driven communications pieces. You probably needed to make design compromises along the way and in the end you’re locked into a proprietary software system that is difficult to modify.

Now you no longer need to be limited by custom software programming and lengthy, expensive development cycles. Our approach and tools for Adobe InDesign® give you control of the design, testing, and change process — reducing your time and cost to create and distribute variable communications.
Do It Yourself — or Let Us Help

Using the Appo Toolset, you can add variable content (including data-driven charts, graphs, and tables) directly into your communications. Since our system links with your data, you will be able to see your data elements, organized so they are easy to find and to include in your documents. For example, you may want to drop in some of your variables like participant name, plan name, or fund name — it’s easy.

We will help you every step of the way. From communication strategy, to design, to implementation, we are dedicated to providing you a more efficient process and the most effective and highest quality communications.

Electronic Communications

The Appo Toolset allows you to convert Adobe InDesign documents into emails and microsites. Through the Appo System you can attach customized PDFs to participant emails. You can also set up microsites for mobile devices to capture enrollment selections at on-site meetings.
Data-Driven Retirement Plan Communications

Whether it’s a simple postcard, a complex enrollment kit, or a fee disclosure, you can now create your data-driven communications without writing a single line of software code.

One Platform for Everything

Emails, microsites, and print communications are generated on the same platform and are automatically formatted for access on Macs, PCs, iPads/tablets, and iPhones/smartphones.
Secure Website for Managing Participant Communications

The Appo System maintains a library of all of your communications assets including data-driven documents, kits, images, variable content, logos, and modules (including charts, graphs, and tables). Now you can use and reuse these assets for print, emails, and microsites.

Our system tracks your approval of documents as well as when documents are added or changed. You can order your communications through automated data-feeds or the online Appo Portal. This secure website portal provides a variety of functions depending on user login credentials and can provide access for your brokers/advisors and plan sponsors to place orders.
Management Reports

Using feedback from your vendors, the Appo System can provide extensive management reporting including information on orders, production status, costs, and campaign effectiveness.
Set-up is Easy with Appo Group

We have developed an extensive data set for communications from enrollment materials to IRA rollovers to fee disclosures. We translate your data definitions into our retirement industry data set and you are up and running. Now you can see and use your data for all types of communications.

The Appo System also integrates with your vendors for marketing and recordkeeping data, workflow and asset management, and print and email production services. This gives you the flexibility to choose and change your suppliers easily and attain Best in Class Services.
Appo Group Approach

Our management team has many years of experience developing data-driven communications for some of the largest retirement plan providers. The Appo System was created to serve the most advanced applications. This includes large data sets, multi-tier data logic, and conditional content. And if you just want to send simple data-driven postcards or emails — the Appo System is your easiest and best choice. From data-driven print, to email, to microsites, we can provide you with a better, faster, and less expensive method of creating communications.

Get Started

If you want to learn more about how the Appo System can support your retirement communications strategy, please contact us at 410.992.5500 or info@appogroup.com.