



Collaboration, Dedication, and Grit

How Aptia delivered a seamless retiree benefits transition under tight timelines



Client Overview

Global Group Retiree Program

1,000 Participants

Challenge

Following a corporate acquisition, the client needed to transition and unify retiree benefit programs under a single platform, without disrupting existing service or relationships.

The project presented several complexities:

- *A compressed implementation timeline aligned with a broader technology migration*
- *A year-long evaluation process requiring Aptia to demonstrate new platform capabilities early in development*
- *The need to preserve continuity for existing retirees while onboarding a new population*
- *High expectations for security, customization, and precision*

This engagement required a partner who could balance speed, collaboration, and consistency to deliver a smooth transition under tight parameters.

Aptia in Action

The Aptia team worked in lockstep to design and implement a successful program rollout.

Key Actions:

- **Strategic Collaboration:** The Retiree Subject Matter Expert and Client Success Team jointly led the initiative, aligning resources across technology, operations, and service delivery.
- **Accelerated Deployment:** Ensured successful onboarding under tightened timeframe.
- **Seamless Integration:** Ensured smooth migration for both legacy and new retiree populations with no disruption to service.
- **Commitment & Follow-Through:** Maintained focus and flexibility throughout contracting and configuration to meet every milestone.

Results:



Successful retiree platform implementation completed on schedule



Retention of existing retiree population and expansion to new participants



Recognized by client for exceptional teamwork and delivery



\$141K Annual Recurring Revenue | 3-Year Contract Term



New client reference established for future retiree implementations

Why It Matters

This project exemplifies Aptia's dedication, collaboration, and execution excellence.

Even in complex transitions, Aptia brings together the right expertise, technology, and processes to ensure continuity and deliver confidence.

When challenges get complex, Aptia delivers clarity and confidence.

Discover how your organization can benefit from confidence with Aptia.

Visit aptia-group.com to learn more.

Aptia is a trusted provider of pensions, health, and insurance solutions, with offices in the UK and US, supported by shared services in India and Portugal. It manages programs covering over six million people and serving more than 1,100 clients. Aptia delivers efficient and reliable solutions that ensure the smooth management of pension plans and employee benefits programs. The dedicated team of experts combines in-depth knowledge with leading technology to simplify the administration process.