Getting the full benefit from your self-service web portals

Self-service web portals:
the key to your Virtual Fund Office

As the COVID-19 pandemic and other disruptions led them to reduce staff time spent in the office, many multiemployer plans embraced a new operations model where the fund office is no longer constrained by four walls, and where great customer service is available 24/7.

Secure cloud-based applications, automated workflow and full-featured member and employer web portals can help you provide uninterrupted service to participants, retirees and employers.

WELCOME TO THE VIRTUAL FUND OFFICE.

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Open the door to better customer service

Demand for online self-service and for 24/7 access to information has never been higher. Self-service portals can be a game-changer for benefit plans, their participants and their employers. Portals give users instant access to vital information and let them conduct business with the fund office at their convenience – but only if they use it!

Two key strategies for getting the most from your self-service portals: strategic launch and sustained promotion.

This guide can help you with both.

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A STRATEGIC LAUNCH:
Shape your roll-out plan
based on your target users

Your self-service web portal roll-out strategy should be
shaped by your knowledge of the people who will be using it.

What's their comfort level with technology and self-service?
Are they used to an older portal on your website?
Is English their preferred language?

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Introducing portals for the first time

When introducing a member or employer portal for the first time, consider rolling out registration gradually. Recruit early adopters – users known to be excited about new tech, those who like being first or who have a compelling business reason to get started ASAP.

Offer this "sneak preview" to users likely to spread the word among their peers and help you recruit new users.

First-time portal users may need the most assistance getting started. A gradual roll-out gives your customer service team time to note and prepare for for common questions early adopters raise.

New users may benefit from how-to videos and illustrated guides to portal use; your portal vendor should work with you to create these materials if you need assistance.

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Rolling out a replacement portal

If you have an older portal users have come to rely on and you plan to replace it with a new and improved version (like basys MemberXG or EmployerXG) you may have to "flip the switch" and introduce the new portal to everyone at once, with no option to do a phased roll-out.

Staff up and extend call center hours before launch, if possible. Some plans designate Portal Subject Matter Experts and route calls about portal registration to them.

Communication, education and promotion are just as important with users switching from a prior portal to your new portal – again, videos and illustrated guides should be available.

Remember Spanish-speaking users

If you have a significant user population whose preferred language is Spanish, choose a portal that offers you a bilingual option. Don't forget to provide promotional materials and outreach in Spanish to reach these users as well.

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Time your portal launch around events that have a high demand for interaction

You are most likely to have the attention of members and employers when you're conducting a high-interaction activity like annual benefits enrollment, payroll audits, W2 distribution, or the rollout of new ID cards or a new benefit.

Time your launch (and your recurring portal promotion) around these key events. If possible, make your portals the default way for users to access these services. Also, direct users to the portal when they call to update their contact information, beneficiaries and dependents, or other critical user data.

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# Portals give customer service agents time to listen and help callers

Even in the best of times, you probably can't staff fund office phone lines 24/7. Self-service portals let your participants and employers get the info they need and conduct critical transactions when it's most convenient for them.

As more routine inquiries are handled through self-service, your team will gain additional time to work with callers who have more complicated issues that may need more personal attention.

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Train & prepare your Customer Service Team

✦ Before roll-out, provide detailed portal training to everyone who answers customer calls. They should feel confident using and explaining the portal and be able to troubleshoot when members or employers call with questions.

✦ The Customer Service "impersonate" feature built into some portals (like MemberXG from basys) lets agents look up a portal user's record and replicate exactly what the caller is seeing on their screen. This makes it much easier to see where they're having problems and to talk them step-by-step through the solution.

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PROMOTE EARLY AND OFTEN
You probably have many tools to spread the word!

- ✦ your website
- ✦ email blasts
- ✦ email signatures
- ✦ your call center
- ✦ printed mailings, posters and handouts

- ✦ shop stewards, business agents & trustees
- ✦ local councils & union meetings
- ✦ social media
- ✦ incentives & discounts

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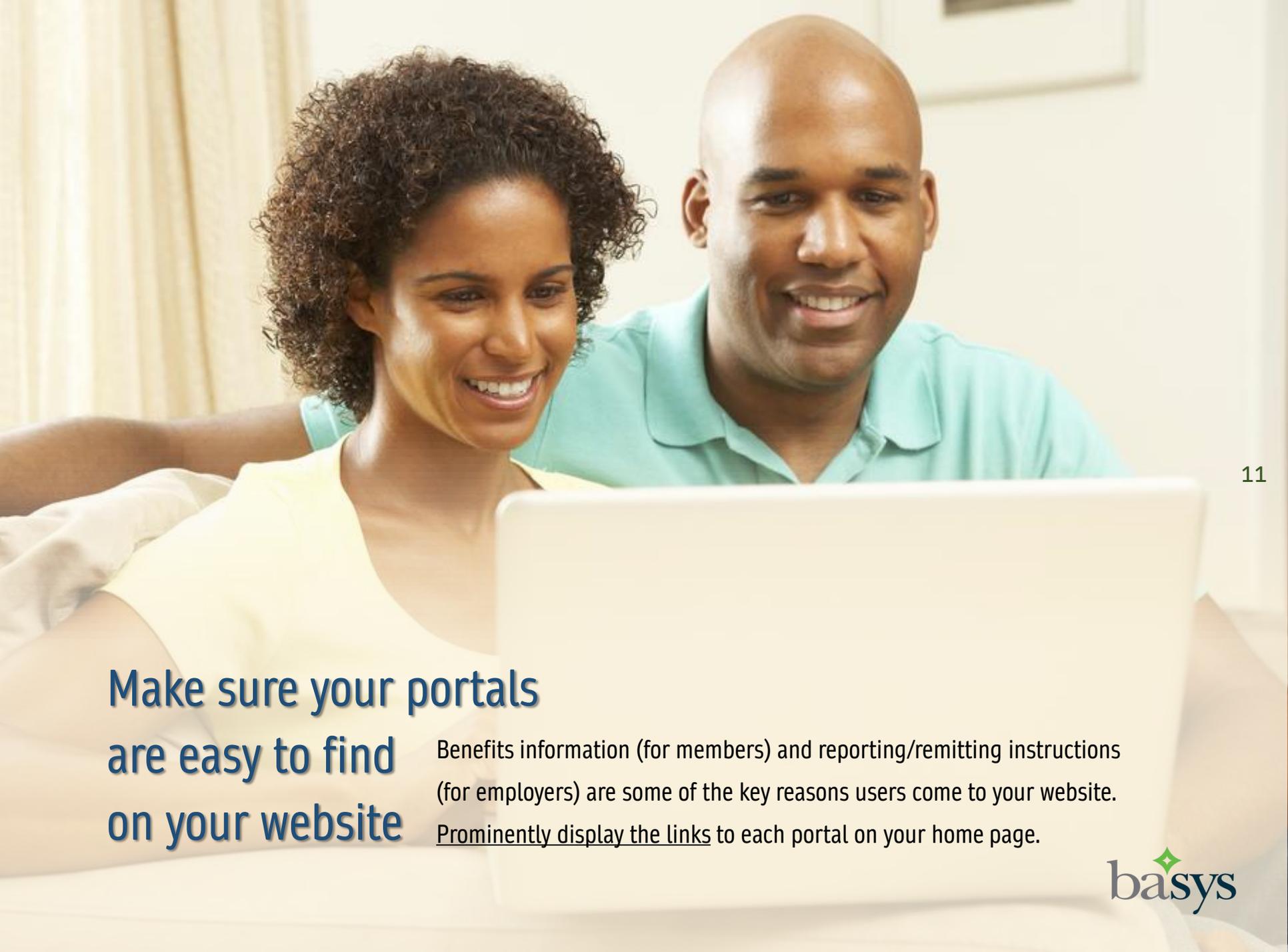
Make sure your portals are easy to find on your website

Benefits information (for members) and reporting/remitting instructions (for employers) are some of the key reasons users come to your website. Prominently display the links to each portal on your home page.

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Add visual cues to your home page that point users to your portals

SIGN UP

✦ Create a descriptive <u>custom URL</u> that's easy to remember (ABCemployerportal.com, for example) and takes users direct to the portal login. WordPress and most other common website platforms make it easy to create simple redirects and point them to your portal.

✦ Is your phone number the most prominent "Contact Us" option on your website and printed materials? Instead, <u>prominently feature the link to or web address of your portals</u> (keep the phone number where it's easy to find but make the portal login links the most prominent contact option).

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Using videos & illustrated user guides

Video can be a terrific tool for both promoting your portals AND showing people how to register for and use them. And creating them is easier than you might expect....

If you can create a PowerPoint presentation, you can create a video! PowerPoint lets you add animation and record voice instructions right from your computer. Use on-screen descriptive text and screenshots to lay out step-by-step instructions. Once your presentation is complete, you can save it as an mp4 (video) file and post it on your website or link to it from an email.

Voilá ! You're a filmmaker.

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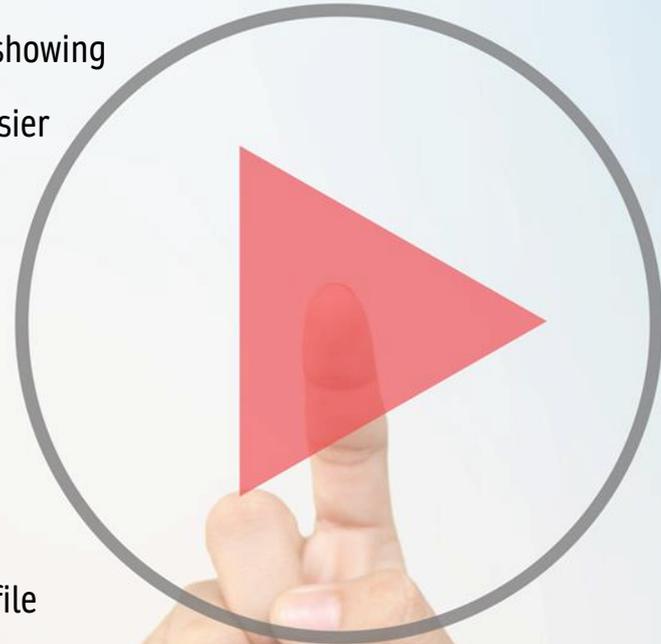
Show, don't just tell

Some users prefer a printed step-by-step guide showing how to register for and use the portal; this way they can save it for future reference.

✦ Use screenshots and illustrations to SHOW exactly what the user should see onscreen. Visuals help most people learn and absorb new concepts more easily.

✦ Turn it into a PDF so users can quickly download it from your website. That way they can store it on their computer for easy reference or print it out to keep handy if they prefer.

✦ Saving the guide as a PDF rather than printing a large quantity also makes it easier for you to post an updated version whenever you add a new portal feature.

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Opportunity to promote: new features

Advanced web portals offer a range of optional features that deliver additional functionality specific to each portal. For instance, you may add a secure document center to offer members or employers a way to submit and download vital documents. Or you may offer users the option to make secure e-payments through your portal.

The features you choose and the needs of your users usually dictate the roll-out strategy. But most customers introduce new capabilities to users gradually. This gives your team and your users a chance to feel confident using the portal before learning an enhanced feature, and it gives your IT team time to work with your technology vendor on implementation and testing the new modules.

It also provides a great excuse to do additional portal promotion. If you introduce a new capability every few months, each time you can reach out to users with a fresh pitch for the portal. Each new feature is a chance to create awareness and interest and increase your portal adoption rates.

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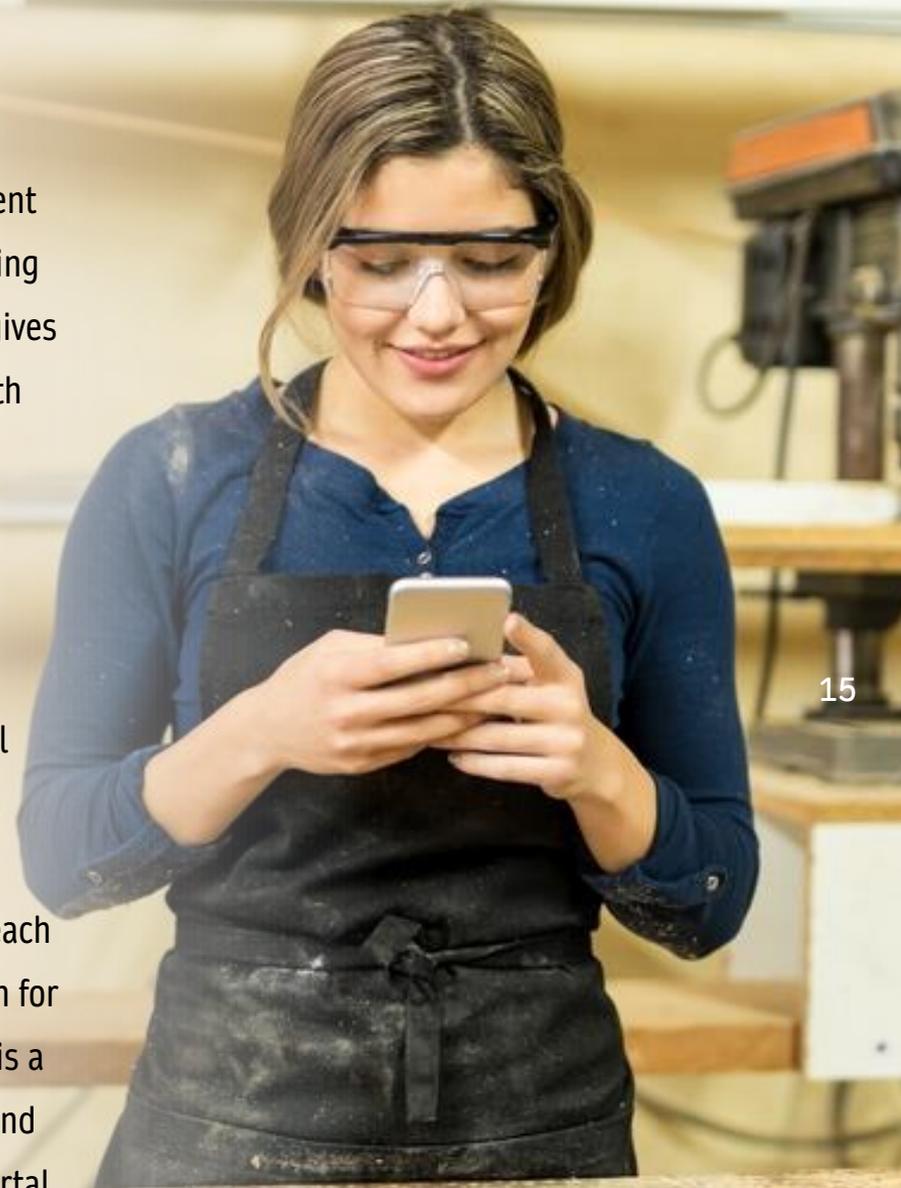
Using email for promotion

Email is a GREAT way to promote your portal. It reaches users when they're already online, and can include a quick link that instantly takes them to your portal.

✦ Collect all the emails! EVERY demographic form members and employers submit should ask for their email address (and cell phone number, if you're going to use SMS/text messaging). To comply with anti-spam laws, be sure to include the option for them to opt out of either form of communication.

✦ MailChimp and other free or low-cost email platforms make it easy to upload a spreadsheet of email contacts, then create and send promotional emails. You can track who opens each email and who clicks the included links.

✦ Create links promoting your portals and add them – along with a little promotional language – to the email signature of everyone in the fund office. That way each routine email you send is helping promote your portals.

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Promote the portals to fund office callers

Members and employers are probably used to calling the fund office for assistance. Take advantage of that habit to help them switch to using your self-service portals.

The first message callers should hear when they call your office – before they ever reach an operator – is a reminder about the portal and the types of information they can find and submit there. Be specific in your message about what the portal offers (complete your enrollment, change your contact info, report hours, check the status of a claim, etc.) so they know if they can hang up and get what they need online.

If they must wait for an agent, use your "hold" message to remind them that they may be able to save time and get what they need sooner by signing on to the portal.

Another great way to involve your customer service team in promoting use of your portals is to create promotions and contests to see which reps can sign up the most users for your portals. Because reducing routine inquiries helps them better serve customers, increasing portal use can be a win-win for them.

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Put it in writing

Signing up for and learning to use the member or employer portal should be routine for every new member or signatory employer. Be sure to include detailed information about the advantages of the portals and how to sign up in the materials you distribute as new users join the fund.

Moving participant and employer communication to the portals can save your office significant costs on paper, printing and mailing. Use the materials your organization DOES print to promote switching to the faster, less-paper alternative of the portal. Consider:

✦ Displaying promotional posters on workplace bulletin boards

✦ Including stories or notices in union newsletters and flyers

✦ Inserting a flyer or postcard in materials routinely printed, like updated CBA documents, tax forms and benefits summaries

✦ Adding a promo on the advice line of checks you print and mail

✦ Providing business agents, shop stewards and trustees with printed how-to info they can share when meeting in-person with members and employers

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Using incentives to promote portal use

Because of the greater efficiency portals offer, some fund offices offer specific incentives to increase sign-up and use:

✦ One fund office offered an early vacation payout for members coping with pandemic-related financial pressures. The payout was conditioned on members requesting it via their portal (and signing up for direct deposit – another huge opportunity to boost efficiency). They now have 75%+ member adoption of their self-service portal.

✦ Another basys customer offers a .5% discount for employers who use the self-service portal for all reporting and remittances.

✦ One basys customer offers employers using their self-service portal an extra two weeks to file monthly reports and remittances, since the information and funds are in the fund office more quickly (and reliably) than they would be via postal mail.

✦ Some offices take a more prescriptive approach, requiring employers to use their portals to file and pay. It's a great practice to introduce the portal and make its use standard for all new employers and members.

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Self-service web portals are a must-have for today's businesses, including multiemployer benefits plans. If you don't yet have one or need assistance getting more stakeholders to use your portal, basys can help.

With secure hosted applications, automated workflow and industry-leading self-service web portals, basys can help you build your own Virtual Fund Office, support participants and employers and thrive while working from almost anywhere. Contact your basys Account Executive to learn more, or call 410.850.4900.

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