Opportunities to deliver better member self-service

1. Guided Registration & Self-Service Onboarding
2. Built-in Password & Login Assistance
3. Paperless Pension Management
4. Active Member Education & Planning Tools
5. Proactive, Personalized Support Tools
1. Guided Registration & Self-Service Onboarding

Registration is the critical next step in unlocking system productivity and member happiness.
Introducing your new
Self-service Adoption Communications Campaign

Effortless access to self-service tools
Zero time spent preparing app/portal rollouts
Happier members who are self-servng

50% Increase in adoption  =  50% Increase in Time Savings

SamCERA
It's finally here! Welcome to your new pension self-service app.

It only takes 3 minutes to get set up, but it will change your life. Let's get started!

Just a few of the things you'll be able to do in your new app:
- Retirement Estimates
- Paperless Plan Management
- Retirement Planning.
2. Built-in Password & Login Assistance

Unlocking password confusion is key to establishing repeat usage.
Password Issues are a Major Hurdle for Both Members and Agents

62%

Of customer service requests (calls, messages) involve a password reset
3. Paperless Pension Management

Save countless support hours by giving your members the freedom to manage their pension on their terms.
What self-service features do people use today?

- **Payment History / Dates**: 13%
- **Secure Messaging**: 22%
- **Member Documents**: 17%
- **Manage Beneficiaries**: 22%
- **Retirement Estimates**: 26%

Breakdown of the top 5 self-service features today.
Tools to manage beneficiaries & allocations electronically

Make important changes easier

For the members to love
- The speed. Digital integration makes the entire process faster
- The tool guides the member through required forms to ensure ease and accuracy

For SamCERA to love
- It integrates with your preferred platform and business processes
Tools to Upload and Review Documents

Make important changes easier

Less than 1% of submitted documents ever have to be returned to the member for correction or missing details when using PensionX

For the members to love

- There’s a central spot to review all submitted documents at their fingertips
- They can instantly upload new, critical documents directly from their phone

For SamCERA to love

- Using electronic document uploads to help members solve needs faster
- It integrates with your preferred platform and business processes
4. Active Member Education & Planning Tools

Help your members live better in retirement by making education and planning effortless.
Your members will love

Easier, Faster & More Accurate Retirement Estimates

For the members to love
- It shares the quick answers at-a-glance
- It pulls in the tricky data automatically to ensure accuracy
- Saved estimates with detailed explanations are always available

For SamCERA to love
- Fewer hours spent on retirement calculation questions
- Quit creating and managing complicated estimators every time things change

Members are twice as likely to open emails or attend retirement seminars after completing an estimate.

Way to Engage Younger Members
Detailed estimates take things to the next level

1. Save and review previous estimates
2. Factor in service credit purchases
3. Plan for changes in schedule
4. Adjust salary projections
5. See detailed scenarios explained
Easy access to classes, seminars & webinars

Educate members online

For the members to love
- They can find helpful classes and videos to answer questions on their time

For SamCERA to love
- No more duplicate work. Website integration pulls directly from your website calendar
- Easier to share classes and videos where members are engaged
- Less time spent answering one-off questions
5. Proactive, Personalized Support Tools

Personalized support is the key to member satisfaction
You’re going to love

**Smart Answers to Your Top Questions**

Faster by 30%

machine learning and smart FAQs drive members to answers 15 seconds faster on each use

**For the members to love**

- Popular answers rise to the top by member type and lifecycle stage
- Answers are discoverable by both search and category
- Personalized support is just a tap away

**For SamCERA to love**

- Effortless platform to manage and update FAQs
- Built-in analytics to understand what your members are looking for
Quick, Secure Messaging with Push Notifications

You're going to love Messages empower quick, personalized answers without ever having to call.

For the members to love
- Messages integrate with your preferred platform and business processes.
- Push notifications ensure members stay informed.
- Conversation threads make it easy to keep track of an issue.

For SamCERA to love
- Messages integrate with your preferred platform and business processes.
You’re going to love

Automated Appointment Scheduling

For the members to love

- The convenience of finally being able to book online
- Having appointment reminders right on their calendar
- Being better prepared for important appointments

For SamCERA to love

- Better meetings, happier members, stronger attendance
- Appointments Integrate with your preferred platform and business processes

4 min

Amount of customer service time saved when using automated appointment scheduling through pensionX