

White Paper: Electronic Adoption Strategies and Best Practices

Many organizations offer electronic statements, bills, renewals, notices and paperless correspondence to their customers. But despite advances in online technology, and in the face of popular sentiment to “be green,” most continue to struggle with increasing paperless adoption. The aim is to save trees, save money, and improve customer communications; but the key to success is getting customers to opt-in to the idea of going paperless.

Are you still printing and mailing thousands of pages of customer correspondence every month despite having an electronic solution? Without a well-defined strategy to drive paperless adoption, you may find that you continue to struggle with managing the burden of paper-bound communications.

How can you encourage your customers to go paperless? Here are some strategies and best practices you can use to increase adoption rates, improve communications, and maximize the value of your communication strategy.

Strategies

New Accounts

It makes sense to start a paperless initiative with all your new accounts. Since you’re starting a new customer relationship, now is the time to set the expectation of a paperless standard. Flag all new accounts and set the default in your system for only electronic communications. Remember, while you’re encouraging customers to go paperless, be sure to provide an option to go back to paper correspondence if they wish. In this case, you may want to consider charging a fee for the paper. You may also consider designing new products that minimize or eliminate fees by virtue of going paperless.

Voluntary Opt-In

The gentlest approach for existing accounts is voluntary opt-in. But, asking customers to proactively choose paperless requires proactive marketing on your part. This strategy starts with a thoughtful effort to build awareness. Are your customers even aware they have an option to opt-out of paper in favor of an electronic alternative? What kind of incentives are they given to do so? Does the customer experience, both online and in person, encourage them to go online instead of in the mail?

Make Enrollment Easy

It is important to make it easy for your customers to enroll in a paperless alternative. Statement2web™ by OMI provides a single sign-on and seamless integration to billing and transaction platforms. But best of all, it’s a simple enrollment process, and easy for customers who want to go paperless, to do so, with just one click. For organizations, managing enrollment through this automated feature has the added benefit of providing a quick and easy way to track the effectiveness of paperless initiatives.

Reverse Opt-In

Unlike the voluntary method, reverse opt-in is a hard line approach to raise electronic adoption. Turning off printed statements, bills, renewals, and notices at a pre-defined future date, for example, is an effective, but potentially risky strategy. It’s important to work diligently to communicate to all your customers, well in advance, so they are aware of the pending change. It is also important to provide a way to opt back-in to receive printed communications, but you may want to consider charging a fee for the service.

Online Customers

Another approach that falls somewhere between voluntary and reverse opt-in is one that focuses on your current online customers. Since these customers are already comfortable with your online services and the online experience, turning off printed correspondence is a natural progression. It is easy to access their statements, bills, renewals, notices, letters and communications through the existing Statement2web™ online customer facing portal.

Again, you can always provide an option to opt back-in for paper if they wish.

If all U.S. households stopped receiving paper bills and statements, 687,000 tons of paper would be saved every year.

Best Practices

The strategies above are great ways to increase electronic adoption. Here are a few best practices to add into the mix to further your success.

Give-Aways and Discounts

Everyone is attracted to a give-away, and you may find giving customers a little something for their effort is a convenient and affordable way to entice them to go paperless. Give-aways and other incentives have shown to increase electronic adoption. These enticements can include everything from inexpensive promotional items, to gift cards, or even a sweepstake for a new iPad.

Raise Awareness

Often, customers who still receive printed statements are unaware they have an option to turn the paper off. It's important to keep proactively promoting your paperless initiatives to keep your customers informed. The best way to raise that awareness is to use all the channels available including direct mail, web banners, social media, email and other touch points. Certainly, this should also include any printed correspondence, as well as, envelope backer ads, statement inserts, and so forth.

Promote Internally

Every time a customer interacts with your service representatives they should be encouraged to go paperless, if they have not already done so. This requires a thoughtful and consistent effort to educate all internal staff, especially customer facing personnel, about why your paperless adoption campaign is important and valuable – to both your customers and your organization. Track your staff's progress and make the drive toward going paperless a visible goal. For example, post a graph on progress, praise the results, and host an internal competition. Continue to encourage this internal promotion through rewards and recognitions that keep the paperless effort moving forward.

Going Green

Many organizations find going paperless is a great way to “be green” and “save green” at the same time. Often, there is positive attention paid to organizations that are “going green”, and that resonates with customers. Make your customers part of the experience by promoting the “green” aspects of your efforts and how they can help the paperless cause.

Know your Demographics

More than 95% of all customer statements, bills, renewals and notices are read every month. Knowing who to target and how to communicate with them in your electronic initiatives gets you one step closer to your goals. Communicate through all accessible channels to understand and overcome hesitations in moving to paperless communications. The more you know the more you grow.

Let's Build A Better Way To Engage Customers Together!

Change the View

About OMI

OMI is a leading Cloud Customer Communication Management (CloudCCM) Service Provider. Our focus is to deliver Cloud Centric, Customer Focused, Engagement Platforms that centralize disparate systems and processes surrounding transactional, marketing and social communications that improve brand experiences.

OMI cloud services simplify mass customer communications by providing organizations the ability to manage communications across internal and external supply chains. We deliver high value services such as customer facing engagement portals, message personalization, segmentation, and analytics through our cloud offerings. OMI delivers services through our brands *Statement2web*[™] a Software as a Service (SaaS) and *366° Degrees*SM a Platform as a Service (PaaS). The services provide content management, marketing automation, campaign delivery, social connections and mobile delivery, allowing organizations to centrally visualize customer interactions and measure engagement across the organization.

OMI's cloud centric services address two key areas of customer relationships; the *customer-facing* and *engagement* channels, by consolidating print, online, email, social and mobile communications into a single organization view, to drive marketing and brand initiatives.

Let's Engage:

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