

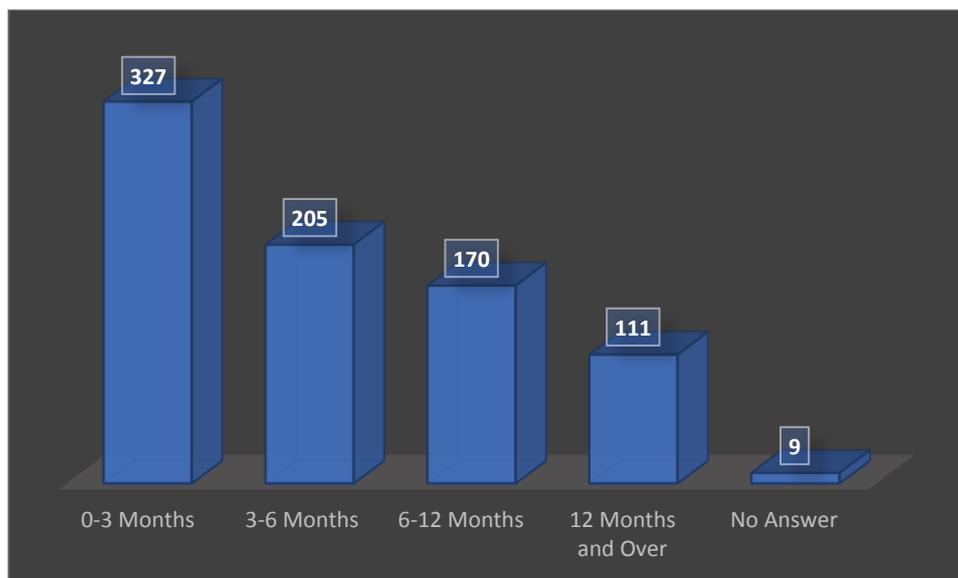
Member Self Service Survey Response

In December 2019, Orbis Pension Services sent out a short survey consisting of 10 questions to approximately 6000 random members across all tranches of membership and all six funds.

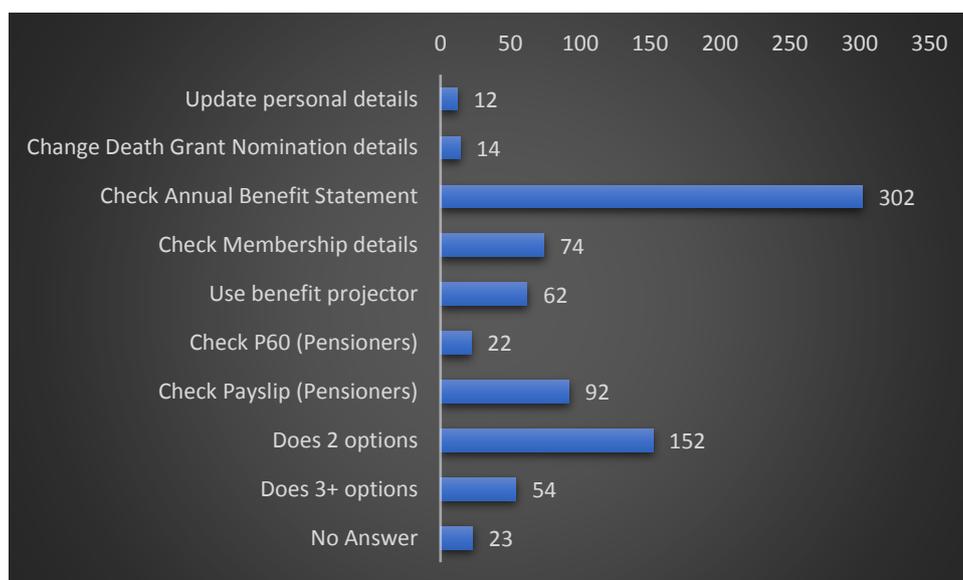
A reminder of the survey was sent again in January 2020 to let them know that the survey was still open and that they still had the opportunity to provide us with their thoughts regarding the member self service portal.

Below you will find the response from 822 members who kindly completed the survey and provided us with valuable feedback.

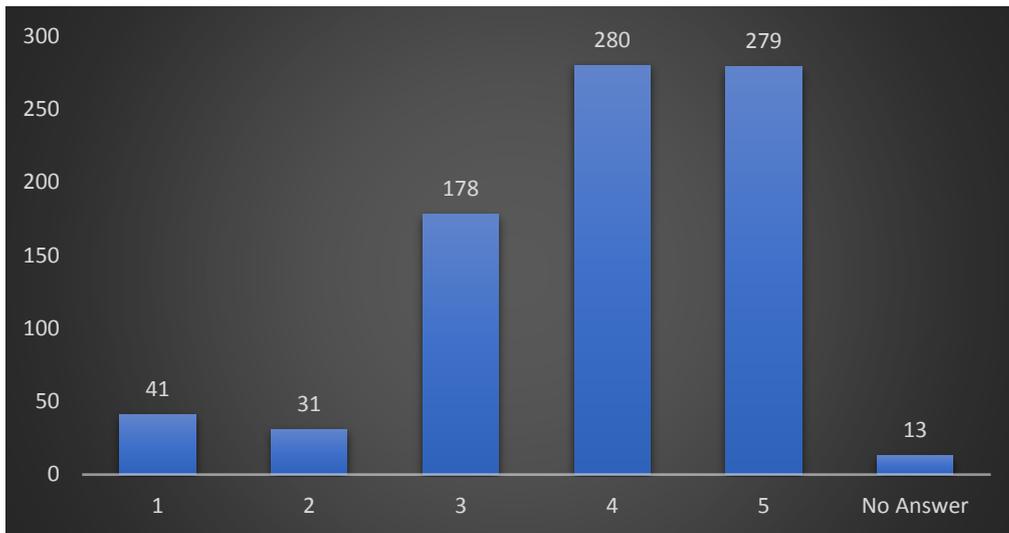
1) When did you last log into the member self-service portal?



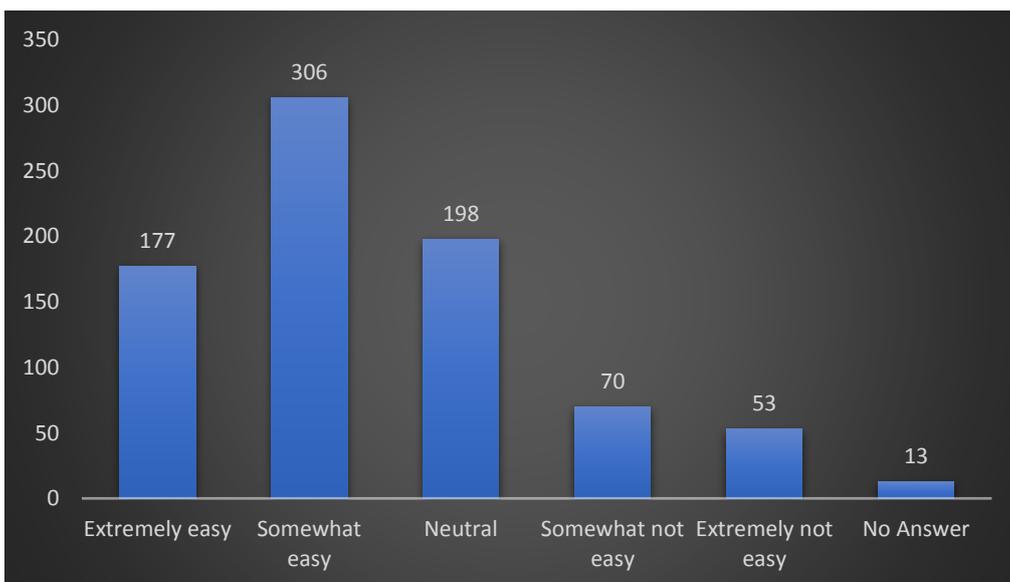
2) What is the main purpose you log into the self-service for?



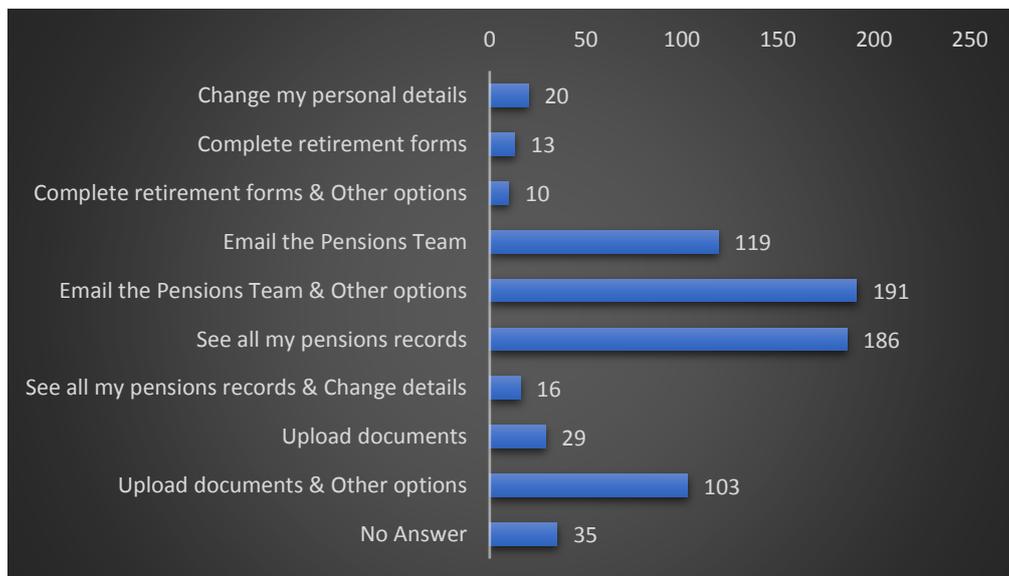
3) How satisfied are you with the security for logging into the self-service? (1 being very dissatisfied & 5 being very satisfied)



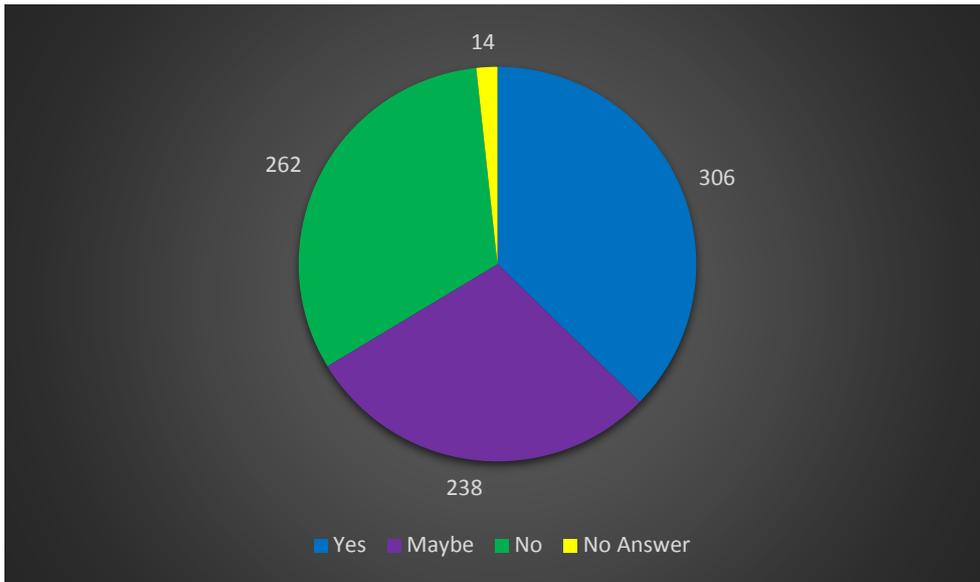
4) How easy do you find using the self-service portal once you have logged on?



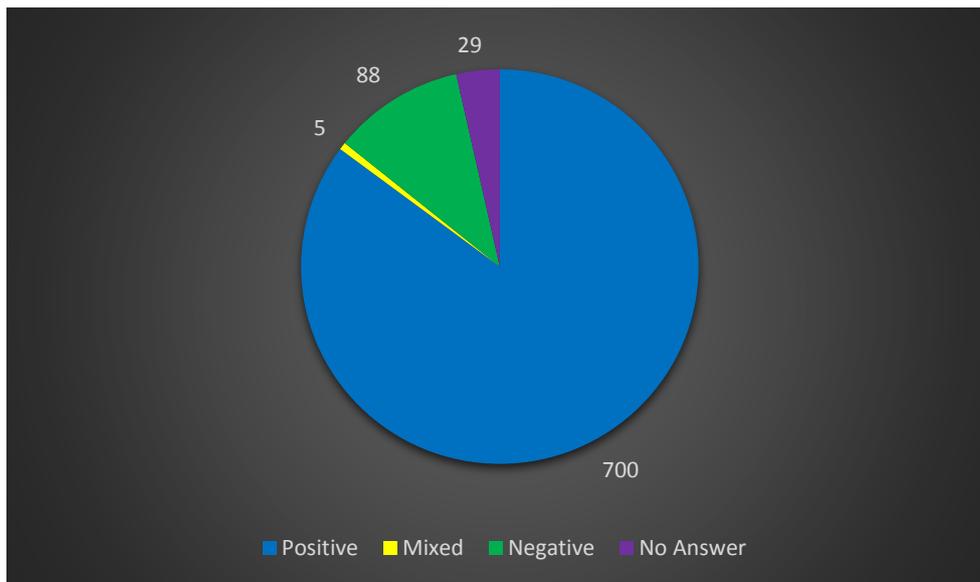
5) What would you like to do on the system that you can't do at the moment?



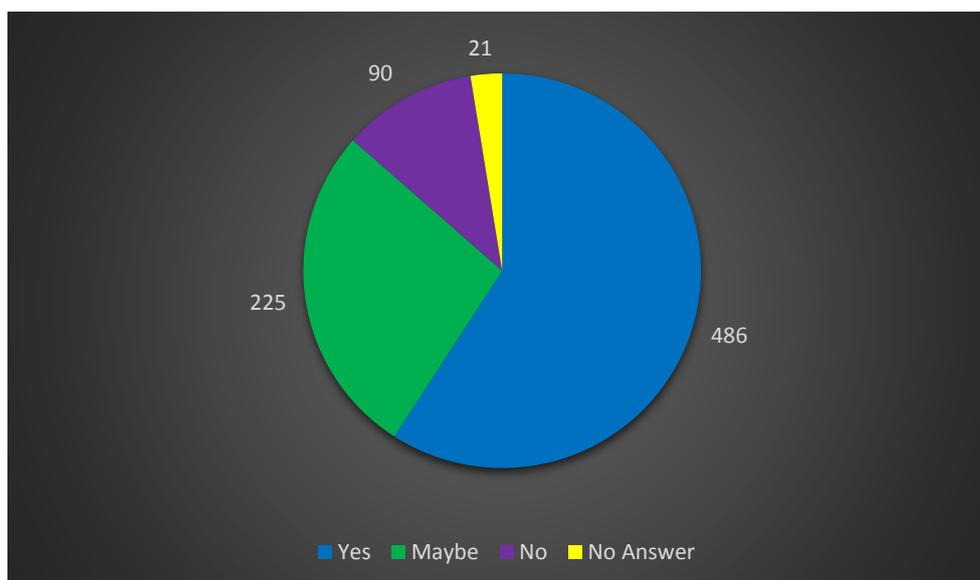
6) Would you use the self-service portal more if you had it as an app on your phone?



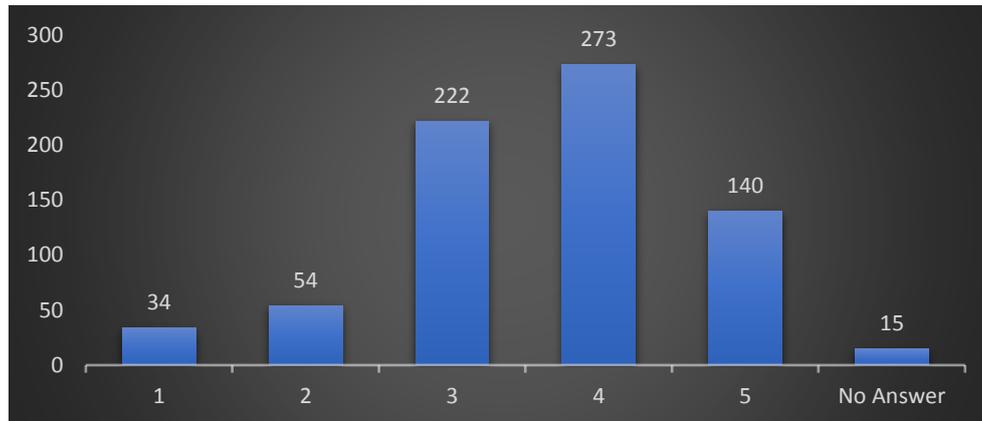
7) Which words would you most use to describe the member self-service portal?



8) Would you recommend the self-service portal?



9) How would you rate your overall experience? (1 being very dissatisfied & 5 being very satisfied)



10) What would you recommend to improve the self-service portal?

The last question allowed members to write down a response of what they believe would make the Member Self Service Portal better. Below you will find an example of the recommendation's members have made:

- ✚ Create an app
- ✚ Clearer information & Navigation
- ✚ A live chat option
- ✚ A how-to guide & glossary
- ✚ Being able to do everything in one place
- ✚ Ability to download/print from the portal
- ✚ Easier to access/login

Conclusion

As you can see from the results, we have had some fantastic feedback regarding the member self service portal. Our survey has provided us with vital information from members who use the self-service portal, to help us to shape our services for the future.

The greatest number of those who completed the survey have confirmed that they have logged into the portal within the last 6 months, with the majority using the portal to check their annual benefit statement.

Most members who completed the survey would recommend the portal and are satisfied with the current layout; the majority have also concluded that they would recommend the pension portal to others.

With regards to security, the majority of responses are positive with a rating of either 4/5 or 5/5 for how secure the portal is.

One question that was vital to Orbis Pension Services was to find out what our members would like to do on the portal which they cannot do now. We have listed the member suggestions below:

Easier to Access/Login

We wanted to see if members had difficulty when navigating around the portal. As you can see from the graph, the majority found the portal extremely or somewhat easy to navigate.

Since this survey was published, the Altair 10.1 upgrade has made the login procedure even simpler for our members.

Email the Pensions Team / Live Chat Option

The majority of members said that they would like to contact the Pensions Team via the portal. This feedback is being considered and we are currently in talks with the system administrators to see if this is an option. Any changes to the service offered by the Helpdesk would have to be implemented after the COVID-19 pandemic has passed and normal service can be resumed.

How To Guide & Glossary / Clearer Information & Navigation / Ability to Download & Print from the Portal / See All My Pension Records

We are also in the process of creating a guide to help users navigate around the portal. The new guide will offer instructions on how to change personal details, update beneficiaries, download and print documents, switch from one record to another and, most importantly, how to use the benefit projector.

Three guides will be developed for active members, deferred members and pensioner members to use.

Upload Documents

The portal is currently being developed to allow members to upload documents to their record, rather than returning them in a hard copy form.

Once this has been completed, we'll start introducing this feature for certain processes.

Create An App

We also wanted to judge whether there was an audience for a mobile application version of the portal. Following feedback received from the survey, presentations and Helpdesk, we believe that having a mobile app would benefit all our members. It's also a great way to develop the service we currently offer. A significant number of 544 members responded that they would use an app if this was available.

This feature is not currently available and the Orbis Pension Services is looking into this with our software supplier.