

# Paymentus

## AUTOPAY ENROLLMENT BEST PRACTICES

COMPREHENSIVE MARKETING TACTICS AND STRATEGIES  
TO DRIVE THE ADOPTION OF AUTOPAY.

# SUMMARY

The transition period from a legacy solution to the Paymentus billing and payment solution is a crucial time in many ways. It is during this time that organizations must take a proactive approach to promoting this change and the benefits it offers.

One major element of this change centers around the move to the Paymentus AutoPay feature. A key aspect of this transition lies in the data migration of your customer information to Paymentus AutoPay.

If your customer information **is migrated**, your organization can focus its efforts on promoting the extended features and benefits of the Paymentus solution. Your customers' payments will continue as normal, with no action required on their part.

If your customer information **is not able to be migrated**, your organization should commit to a promotional campaign aimed at driving re-enrollment for existing AutoPay users.

This guide offers comprehensive marketing strategies and messaging that will cover 45 days pre-launch through the launch of the Paymentus solution for organizations needing to drive re-enrollment of their AutoPay offering.

To help support your organization's overall marketing launch strategy, Paymentus offers a Biller Communications Launch Kit, found [here](#). If you need any assistance in creating or executing your messaging and communication materials, Paymentus offers comprehensive marketing support through our Client Adoption Success Team (CAST) at no additional cost to you.

**Please contact:** Client Adoption Success Team at **CAST@paymentus.com** or visit <https://www.paymentus.com/cast>

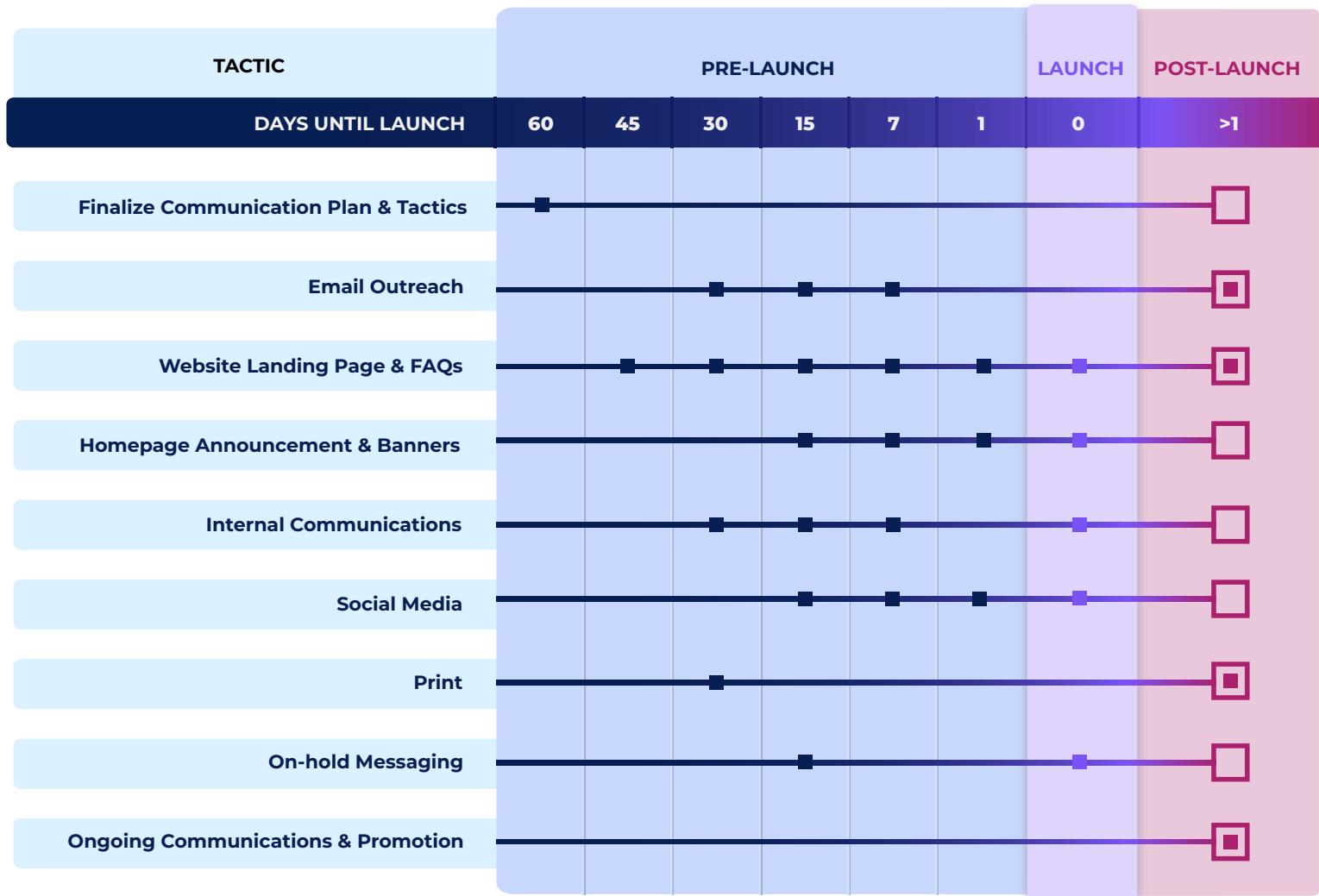
# TABLE OF CONTENTS

<b>Section 1:</b> 45 Days Pre-Launch .....	<b>6</b>
<b>Section 2:</b> 30 Days Pre-Launch .....	<b>9</b>
<b>Section 3:</b> 15 Days Pre-Launch .....	<b>14</b>
<b>Section 4:</b> Day Before Go-Live.....	<b>17</b>
<b>Section 5:</b> Launch Day/Post Launch .....	<b>20</b>

## IMPORTANT REMINDER

The communications shared within this guide are for placement only and will need to be customized based on your integration. Please read through the sample communications carefully and reach out to our team at **CAST@paymentus.com** if you need help drafting communications unique to your platform.

# LAUNCH COMMUNICATIONS CALENDAR & TIMELINE



The timeline contained within this section should serve as a guideline for your marketing efforts and should be adjusted based upon your particular implementation. It is important to note that as it relates to AutoPay re-enrollment, customers cannot enroll before the Paymentus solution is fully implemented and launched.

Because of this, all communications prior to the official launch will serve as general awareness for customers that there will be an upcoming action necessary in regards to AutoPay. Therefore, it is imperative that organizations create a dedicated landing page (found on page 7) to serve as a transition resource.

# LAUNCH COMMUNICATIONS CALENDAR & TIMELINE

Paymentus recommends that all organizations commit to at least a 45-day marketing campaign when launching the Paymentus solution. AutoPay re-enrollment messaging can be incorporated into a larger campaign promoting the new solution (found in the [Biller Communications Launch Kit](#)).

This guide will focus solely on AutoPay re-enrollment. Campaigns can run concurrently should your organization choose to run both an overarching campaign and an AutoPay campaign.



## SECTION 1

# 45 DAYS PRE-LAUNCH

Paymentus recommends that your team begin its pre-launch campaign approximately 45 days prior to going live. As it is likely that your customers will receive a bill within this window, we recommend beginning your campaign by announcing the need to re-enroll through highly trafficked sections of your website.

This is also an ideal time to answer FAQs related to AutoPay re-enrollments. FAQs should be located within your resource page and within a blog/news post. If you need help answering these questions, please reach out to our CAST team at [cast@paymentus.com](mailto:cast@paymentus.com) for assistance.



# ONLINE BILL PAY LANDING PAGE

Please note that it is recommended your organization create a single landing page to serve as a transition resource for customers. This comprehensive page should directly address actions customers must take, as well as FAQs. Below, you will find a sample list of FAQs to consider.

The screenshot shows a website layout for "ABC BILLER". At the top, there's a navigation bar with links for Home, About US, Services, Contact, News (which is underlined in blue), and Pay Bill. There's also a search bar. Below the navigation, a breadcrumb trail shows "Home / News / New Bill Pay System". The main content area features a heading "Introducing an Easier Way to Pay and Manage Your Monthly Bill". A paragraph explains the launch of a new bill payment system, mentioning the upgrade will provide a more advanced, flexible, and comprehensive experience. It also notes that the legacy system will no longer be active and future scheduled payments will be deactivated. The ABC Organization will notify customers when enrollment in the new system is available. Below this, a section titled "Frequently Asked Questions" lists ten questions related to the new system, such as "What is changing?", "What payment methods and payment options are available?", and "Where do I find my new bill?".

**ABC BILLER**

Home   About US   Services   Contact   **News**   Pay Bill

Home / News / New Bill Pay System

## Introducing an Easier Way to Pay and Manage Your Monthly Bill

ABC Organization is excited to announce the launch of an all-new bill payment system. This upgrade will provide you with a more advanced, flexible and comprehensive bill-management experience. As a user of the previous bill pay system, we want to share how this change will affect the status of any current scheduled payments, as well as other changes you can expect during this transition.

Please note that the legacy payment system will no longer be active and your payment information and future scheduled payments will be securely and permanently deactivated. ABC Organization will notify customers when enrollment in the new system is available.

### Frequently Asked Questions

What is changing?

What payment methods and payment options are available?

When will the new system be implemented?

Will there be an interruption of online [insert biller name] bill payment services during the update?

If I am a pre-existing AutoPay user, will I need to re-enroll?

Can I use these options to pay a deposit?

Can I use these options to pay a reconnect fee?

Can I set up AutoPay from the one-time pay portal?

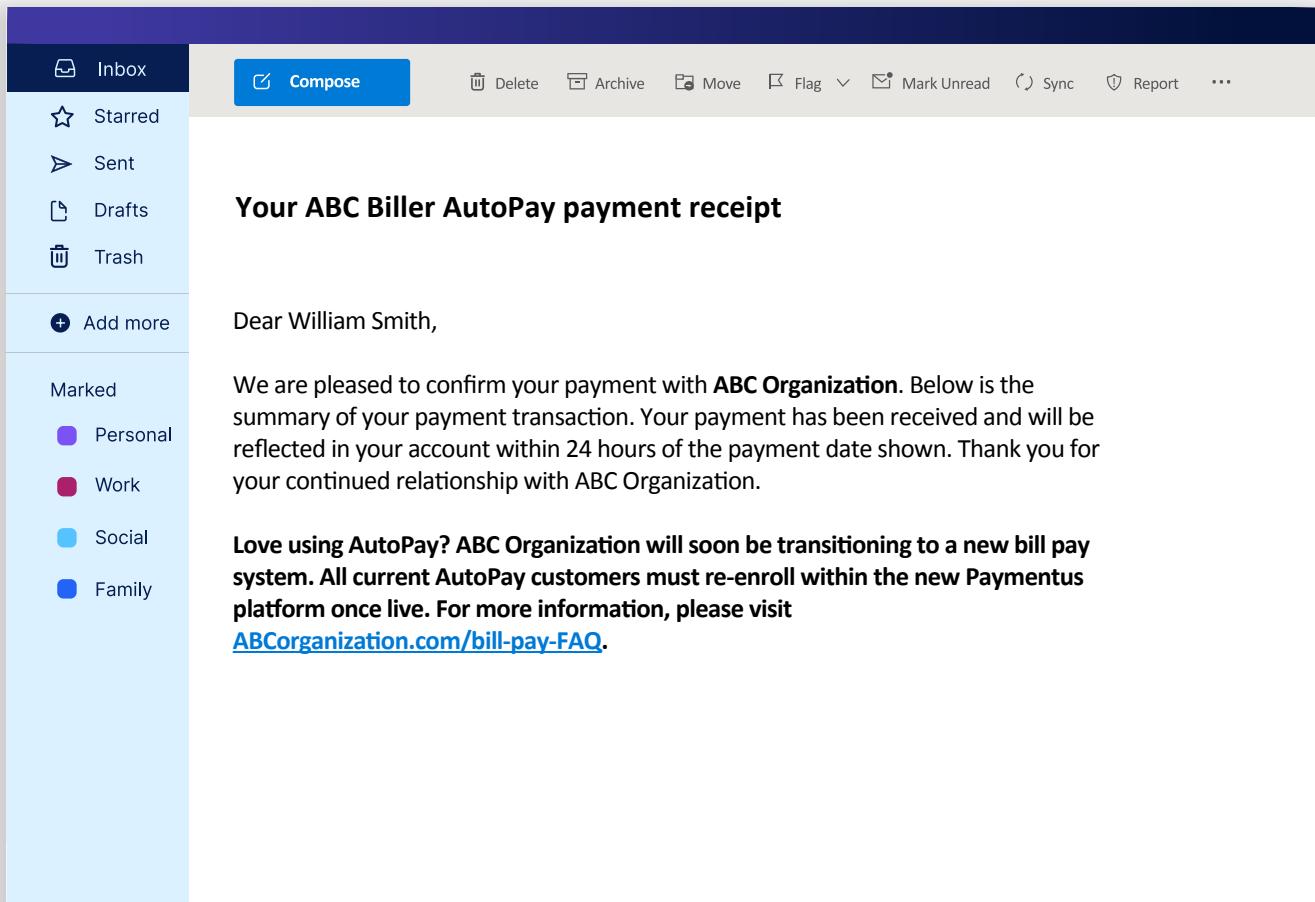
Where do I find my new bill?

Will I still receive a paper copy of my bill?

*Sample Landing Page*

# AUTOPAY NOTIFICATIONS

If your organization's current billing and payment solution offers AutoPay notifications (upcoming payment, payment received, payment confirmed, etc.), it is recommended that you use these notifications to promote the upcoming change. This can be as simple as adding a line of text addressing the upcoming change, with a button to your organization's online bill pay landing page.



The screenshot shows a simulated email inbox interface. On the left is a sidebar with icons for Inbox, Starred, Sent, Drafts, and Trash, along with an 'Add more' option. Below these are color-coded categories: Personal (blue), Work (orange), Social (green), and Family (purple). The main area displays an incoming email from 'ABC Biller' with the subject 'Your ABC Biller AutoPay payment receipt'. The email body starts with 'Dear William Smith,' followed by a confirmation message about the payment transaction. At the bottom, there is a promotional message about transitioning to a new bill pay system, including a link: [ABCorganization.com/bill-pay-FAQ](http://ABCorganization.com/bill-pay-FAQ).

*Sample Autopay Notification*



## SECTION 2

# 30 DAYS PRE-LAUNCH

30 days prior to launch is the ideal time to begin surrounding customers and staff with information on the necessary actions customers must take in regards to their continued AutoPay enrollment.

While customers cannot yet take action, it is crucial that they understand the expectations and timelines associated with re-enrolling in AutoPay.

# CUSTOMER EMAIL OUTREACH

The screenshot shows a simulated email inbox interface. On the left is a sidebar with navigation links: Inbox, Compose, Starred, Sent, Drafts, Trash, Add more, Marked, Personal, Work, Social, and Family. The 'Compose' button is highlighted. The main area displays a draft email with the following content:

**Subject Line A: Important news for AutoPay customers**  
**Subject Line B: Action needed for AutoPay customers**

Dear Valued Customer,

As part of our ongoing commitment to delivering a best-in-class experience for our customers, ABC Organization will soon be implementing a new billing and payment system. The new bill pay system will offer a host of benefits over our previous platform including expanded payment options, an easy-to-use self-service portal, paperless billing and more!

**For AutoPay Customers**

Due to this transition, all current AutoPay customers will need to re-enroll to continue making automatic payments once the new payment portal is live. AutoPay enrollment only takes a few minutes and is the simplest way to ensure your monthly payment is always on time. AutoPay also allows you to set your preferred payment method including paying by credit card, debit card or eCheck.

We will contact you again as we move closer to the official launch date.

For more information, please visit [ABCorganization.com/bill-pay-FAQ](http://ABCorganization.com/bill-pay-FAQ) or contact us at (PHONE NUMBER) or (EMAIL ADDRESS).

Thank you,

ABC Organization Customer Care Team

**Sample Autopay Email**

# PRINT MEDIA - BILL INSERT

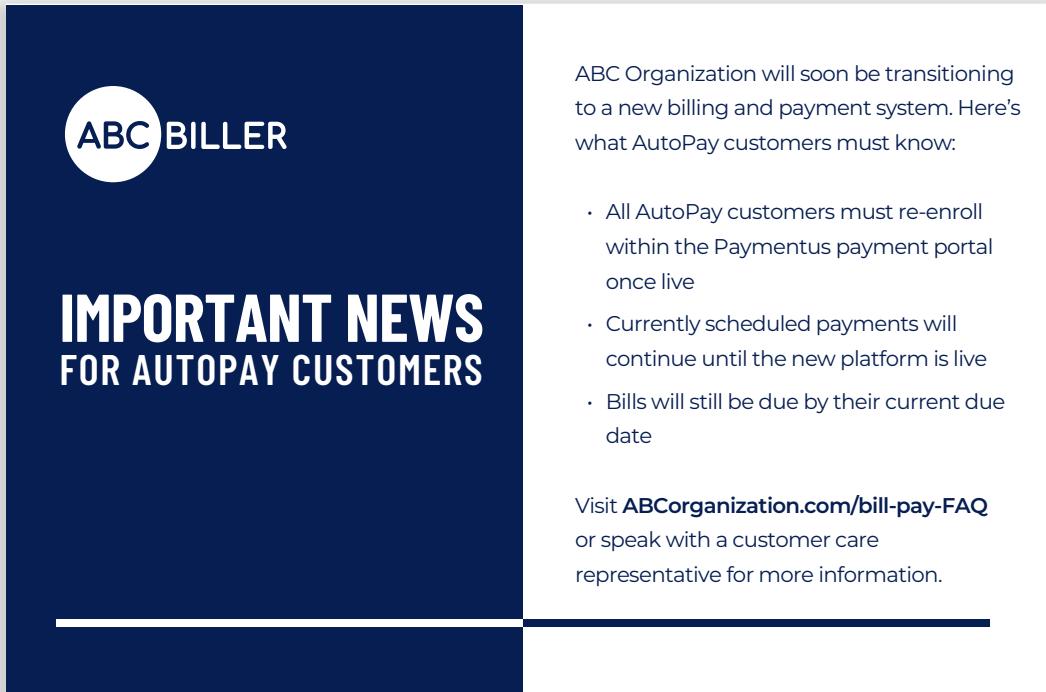


*Sample Bill Insert*

Please note that CAST can create QR Codes as needed. To take full advantage of your bills and in-branch signage, please contact the Client Adoption Success Team at **CAST@paymentus.com** or visit <https://www.paymentus.com/cast>.



## PRINT MEDIA - LOBBY POSTCARD



*Sample Lobby Postcard*

# INTERNAL COMMUNICATIONS - EMAIL

The screenshot shows a simulated email inbox interface with a dark blue header and a light gray body. On the left is a sidebar with icons for Inbox, Compose, Starred, Sent, Drafts, Trash, Add more, Marked, Personal, Work, Social, and Family. The main area has a "Compose" button and various action icons: Delete, Archive, Move, Flag, Mark Unread, Sync, Report, and three dots. The main content is an email titled "Important information for our AutoPay customers".

**Important information for our AutoPay customers**

As part of our ongoing commitment to best serving our customers, we recently contracted leading provider Paymentus to revamp our billing and payment solution. This transition will necessitate all current AutoPay customers re-enroll in AutoPay.

To help our customers during this time, we have launched a multi-channel AutoPay re-enrollment campaign. Here are a few items to keep in mind that can best help you assist customers during this transition:

- **Why do customers need to re-enroll in AutoPay?**  
Saved customer AutoPay information is not transferable from our legacy solution to the new bill pay system. Due to this, all AutoPay customers must re-enroll within the new customer portal.
- **What is the timeline for re-enrolling?**  
Customers can begin re-enrolling once the new bill pay system is live. We will be sending out communications alerting customers that the new platform is now live and they are able to re-enroll.
- **The Timeline**  
The current system will be live until (LAUNCH DATE), wherein the new bill pay system will be fully implemented. Our teams are currently working with the Paymentus team to ensure there is no service interruption for our customers.
- **Customer Communications**  
In advance of our launch date, we will be launching a set of promotional items to inform our customers of the upcoming change. This will include emails, social posts and a landing page to ease the transition and inform customers of the upcoming change.
- **Who is Paymentus?**  
Paymentus is a best in class electronic bill presentment and payment (EBPP) provider. Its cloud-based bill payment technology solutions are currently in use by more than 2,200 billers and financial institutions, and the company was rated as the #1 EBPP provider by Aite-Novarica. You can learn more by visiting [www.paymentus.com](http://www.paymentus.com).

We thank you for helping us make this transition as successful as possible. Should you have any questions, please contact (CONTACT).

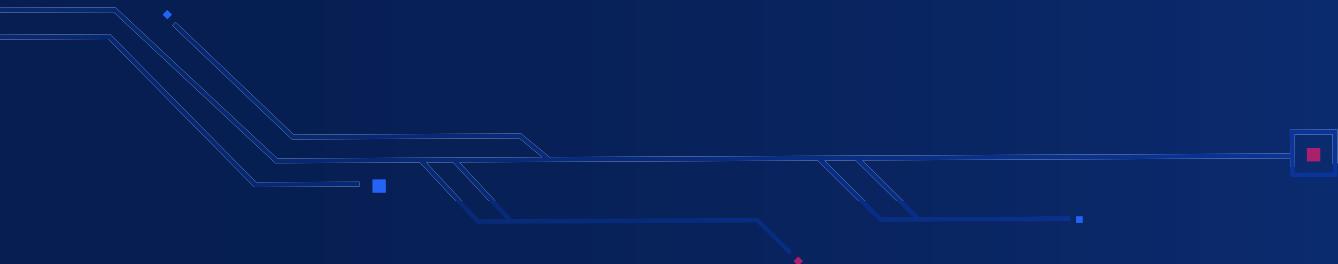
*Sample Internal Communications Email*



## SECTION 3

# 15 DAYS PRE-LAUNCH

As you approach your go-live date, it is important to deliver communications that offer more specific information. Your website should now feature a dedicated resource page and all questions related to desired customer actions should be answered.



# CUSTOMER EMAIL OUTREACH

The screenshot shows a digital inbox interface with a dark blue header bar. In the top left, there's a sidebar with icons for 'Inbox' (selected), 'Compose' (highlighted in blue), 'Delete', 'Archive', 'Move', 'Flag', 'Mark Unread', 'Sync', 'Report', and '...'. The sidebar also lists 'Starred', 'Sent', 'Drafts', and 'Trash' under a 'Marked' section, which includes 'Personal', 'Work', 'Social', and 'Family' categories.

The main content area displays an email message:

**Subject Line A: Action Required: Reminder for AutoPay customers**  
**Subject Line B: Action Required: AutoPay re-enrollment information**

Dear Valued Customer,

With the impending launch of our new bill pay system on (Go-Live Date), we want to send a quick note regarding your AutoPay schedule.

As of (Go-Live Date), your current AutoPay account will be deactivated. All scheduled payments will be effectively canceled. If you are currently enrolled in AutoPay and wish to continue making automatic payments, **you will need to re-enroll within the new portal.**

AutoPay enrollment only takes a few minutes and is the simplest way to ensure your monthly payment is always on time.

For more information, please visit our updated bill pay resource page <Link to Resources Page>. This page provides a comprehensive overview of our new bill pay experience and includes answers to commonly asked questions.

You can also contact us <Biller's Preferred Contact Method(s)>.

Thank you,

(Biller Customer Care Team)

**Sample Autopay Email**

# SOCIAL MEDIA

The following posts can be taken as whole or used as a reference when creating your social media campaign.

 **ABC Biller**@abcbiller · 3h ...

In two weeks, ABC Organization will officially transition to our new bill pay system. This new experience offers a greater level of payment flexibility and convenience, with expanded payment options and a more intuitive user experience.

Please note that if you are currently an AutoPay customer, you will need to re-enroll once the new platform is live. For more information, please visit [ABOrganization.com/bill-pay-FAQ](http://ABOrganization.com/bill-pay-FAQ).



*Sample Social Media Post*

Need help creating web materials? Contact CAST at **CAST@paymentus.com** or visit <https://www.paymentus.com/cast>.



## SECTION 4

# DAY BEFORE GO-LIVE

It's important to maintain consistent communications right up until and through your launch date. Last-minute reminders, coupled with day-of communications, ensure your customers are fully aware of your launch and necessary actions.

Given their timeliness, we recommend limiting day-before messaging to email and social channels.

# CUSTOMER EMAIL OUTREACH

The screenshot shows a simulated email inbox interface. On the left is a sidebar with icons for Starred, Sent, Drafts, and Trash, along with an 'Add more' button. Below these are sections for 'Marked' (Personal, Work, Social, Family) and 'Compose' (highlighted in blue). The main area displays two subject lines: 'Subject Line A: Your Enhanced Bill Pay Experience is Launching Tomorrow — What You Need to Know' and 'Subject Line B: New online payment platform updates'. The body of the email begins with 'Dear Valued Customer,' followed by a note about the new bill pay platform launching tomorrow. It includes a bullet point about AutoPay payments and a link to a resource page. The message concludes with contact information and a signature from the 'Biller Customer Care Team'.

Subject Line A: **Your Enhanced Bill Pay Experience is Launching Tomorrow — What You Need to Know**

Subject Line B: **New online payment platform updates**

Dear Valued Customer,

With our new bill pay platform launching tomorrow, we want to send a last-minute note sharing a few key items to make your transition as smooth as possible.

- **Scheduled AutoPay Payments:** If you are currently enrolled in AutoPay, you will need to re-enroll to continue making automatic payments. AutoPay enrollment only takes a few minutes and is the simplest way to ensure your monthly payment is always on time.

For more information, please visit our updated [bill pay resource page](#). This page provides a comprehensive overview of our new bill pay experience and includes answers to commonly asked questions.

You can also contact us <Biller's Preferred Contact Method(s)>.

Thank you,

(Biller Customer Care Team)

*Sample Autopay Email*

# SOCIAL MEDIA

The following posts can be taken as whole or used as a reference when creating your social media campaign.

 **ABC Biller** @abcbiller · 3h ...

Our new bill pay experience launches tomorrow! Here are a few quick reminders to ensure a seamless transition:

- AutoPay customers will need to re-enroll
- We now accept digital wallet payments

Please reach out to our customer care team should you have any questions, or visit our dedicated resource page:  
[ABCOrganization.com/bill-pay-FAQ](http://ABCOrganization.com/bill-pay-FAQ).



The graphic features a dark blue background with white text. At the top, it says "ENHANCED BILL PAYMENTS" in large, bold, sans-serif letters. Below that, in smaller letters, is "COMING TOMORROW!". In the bottom left corner is the "ABC BILLER" logo. To the right of the text is a circular inset showing a smiling man wearing glasses and a light blue shirt, sitting at a desk with a laptop and holding a white coffee cup.

*Sample Social Media Post*

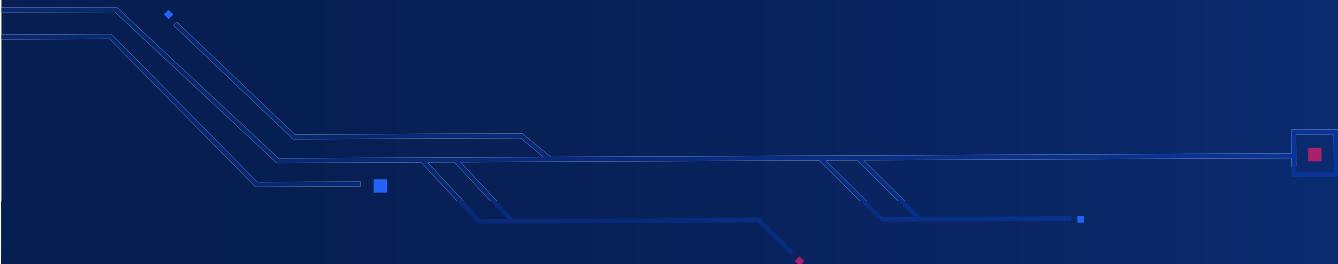


## SECTION 5

# LAUNCH DAY / POST LAUNCH

Follow through your pre-launch campaign with comprehensive post-launch marketing. As AutoPay enrollment will now be available, post-launch campaigns are an essential part of driving adoption of your new bill pay portal and will limit customer calls and concerns.

Suggested materials here include all pre-launch campaign activities with updated messaging and imagery.



# CUSTOMER EMAIL OUTREACH

The screenshot shows a simulated email inbox interface. On the left is a sidebar with navigation links: Inbox (selected), Starred, Sent, Drafts, Trash, Add more, Marked, Personal, Work, Social, and Family. The main area shows an email message with the following content:

**Subject Line A: AutoPay enrollment is now available!**  
**Subject Line B: You can now re-enroll in AutoPay**

Hi (Customer Name),

With our new bill pay experience now live, here are a few things to keep in mind to help you get the most from the revamped portal:

- **Scheduling AutoPay:** AutoPay enrollment is now available and only takes a few minutes. AutoPay is the simplest way to ensure your monthly payment is always on time and allows you to set your preferred payment method. You can re-enroll in AutoPay here: ([LINK TO NEW PORTAL](#))
- **Selecting Your Preferred Payment Method:** The new ABC Organization payment system now offers expanded payment options including (NAME NEW OFFERINGS). You can select your preferred payment method within your account here: ([SHOW SCREENSHOT](#))
- **Confirming Account Details and Preferences:** To ensure a seamless transition, please be sure to check and confirm your account information is correct. This includes confirming your payment preferences and details, as well as inputting relevant payment information.

As a reminder, you can learn more by visiting our updated bill pay resource page.

You can also contact us <Biller's Preferred Contact Method(s)>.

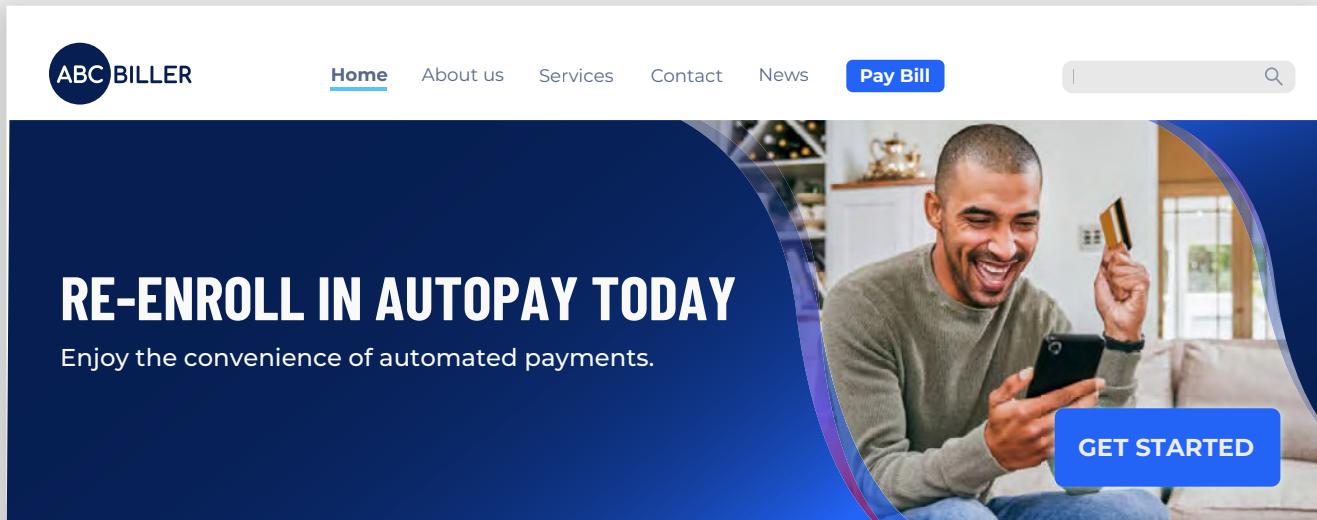
Thank you,

(Biller Customer Care Team)

*Sample Autopay Email*

# Homepage Announcement

We recommend all AutoPay re-enrollment messaging be accompanied by an overarching campaign promoting the new platform (as contained in the [Biller Communications Launch Kit](#)).



**RE-ENROLL IN AUTOPAY TODAY**  
Enjoy the convenience of automated payments.

**GET STARTED**

## SERVICES



### NEWS

ABC Biller has launched an all-new, modern bill pay service!



### DEPARTMENTS

Looking to pay a department specific bill? Search our directory for quick access.

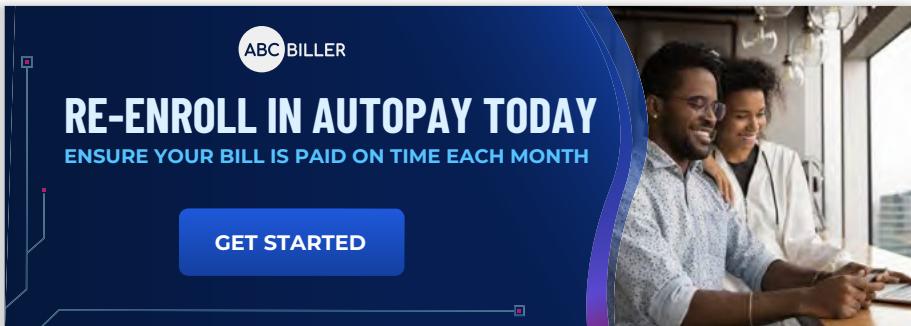


### SOCIAL MEDIA

Follow us on Facebook, Twitter, Instagram or Nextdoor.

*Sample Homepage*

## WEBSITE BANNERS AND TILES



Sample Web Banner



Sample Web Banner 2



Sample Web Banner 3



Sample Web Banner 4

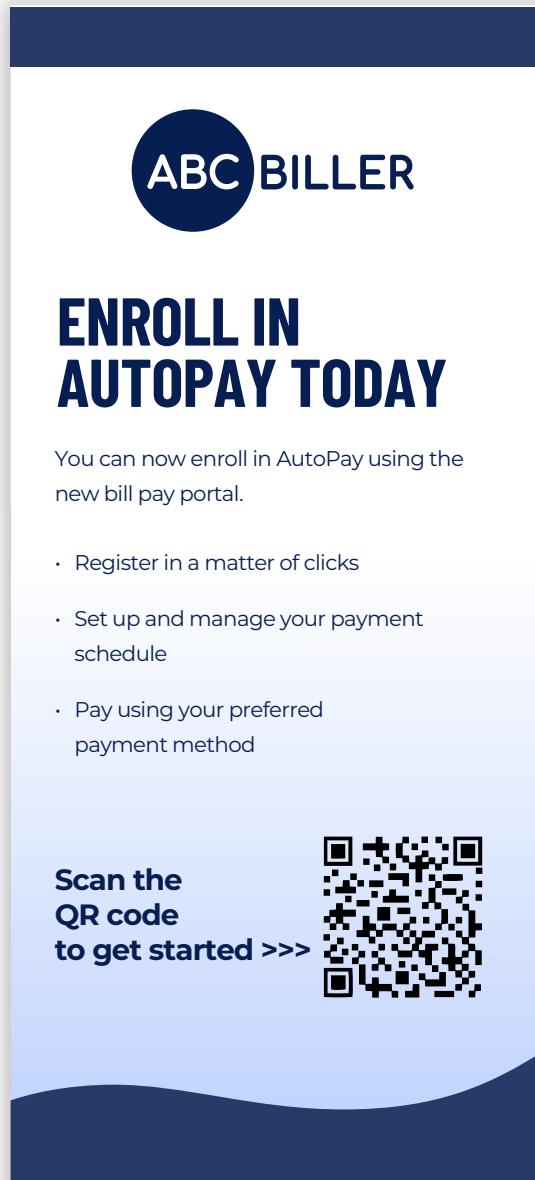
# SOCIAL MEDIA

The following post can be taken as whole or used as a reference when creating your social media campaign.



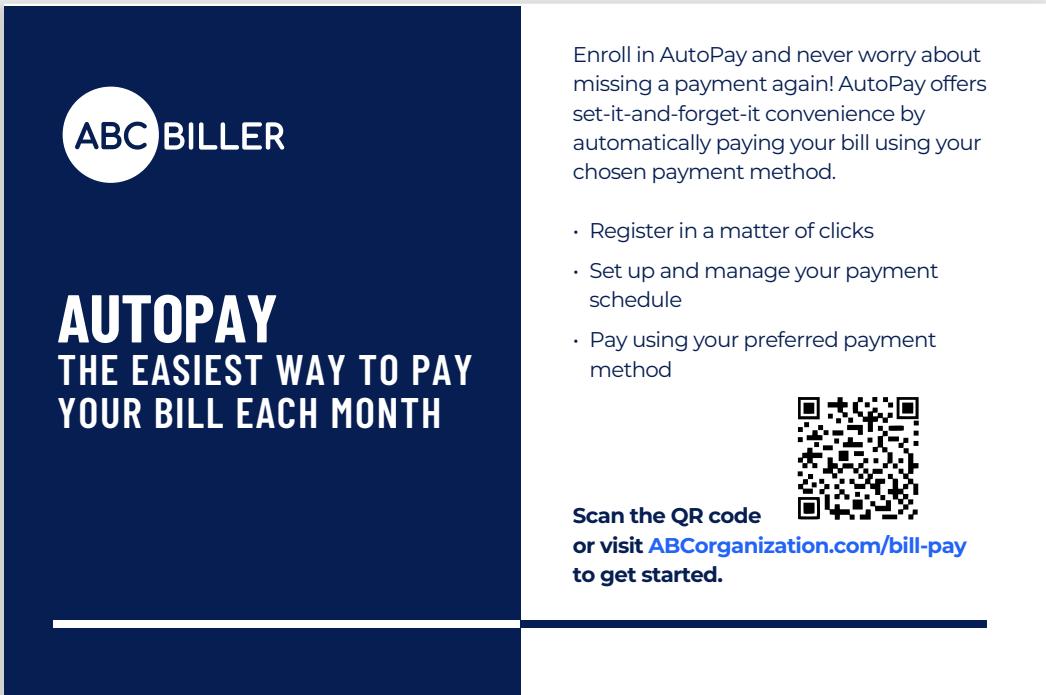
*Sample Social Media Post*

## PRINT MEDIA - BILL INSERT



*Sample Bill Insert*

## PRINT MEDIA - LOBBY POSTCARD



*Sample Lobby Postcard*

# PAYMENTUS CLIENT ADOPTION SUCCESS TEAM (CAST)



Could your organization benefit from additional marketing support? To help our clients meet and exceed their adoption goals, Paymentus is proud to offer complimentary marketing resources in the form of CAST.

CAST features a dedicated team of account managers, writers and designers to deliver full-scale marketing support proven to drive adoption and increase transaction volumes.

CAST creates a wide array of customizable, tailored marketing materials including:

- **In-office and print collateral**
- **Digital campaigns and web**
- **Incentive programs including sweepstakes and giveaways**
- **Direct mail**
- **Public relations**
- **And this AutoPay guide!**

CAST also offers comprehensive reporting and measurement to optimize the performance of all campaigns and marketing materials.

For more information, please contact the Client Adoption Success Team at **CAST@paymentus.com** or visit **<https://www.paymentus.com/client-adoption-success-team/>**.

# Paymentus



Paymentus (NYSE: PAY) is a leading provider of cloud-based bill payment technology and solutions. We deliver our next-generation product suite through a modern technology stack to more than 2,200 clients across North America. Our omni-channel platform provides consumers with easy-to-use, flexible and secure electronic bill payment experiences through their preferred payment channel and type. Paymentus' proprietary Instant Payment Network®, or IPN, extends our reach by connecting our IPN partners' platforms and tens of thousands of billers to our integrated billing, payment, and reconciliation capabilities. Paymentus serves billers of all sizes across a variety of industry verticals, including utilities, financial services, insurance, government, telecommunications and healthcare. For more information, please visit [www.paymentus.com](http://www.paymentus.com).