

CLIENT LOGIN

TREASURY RESOURCES

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This presentation was originally
given by:

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At the 2001 B2B E-Commerce Conference, San Francisco

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The Board of Pensions
of the Presbyterian Church (U.S.A.)

Electronic Collections: *Putting Faith in E-Bill*

Presented by:



Beth Zornick
*Board of Pensions,
Presbyterian Church*

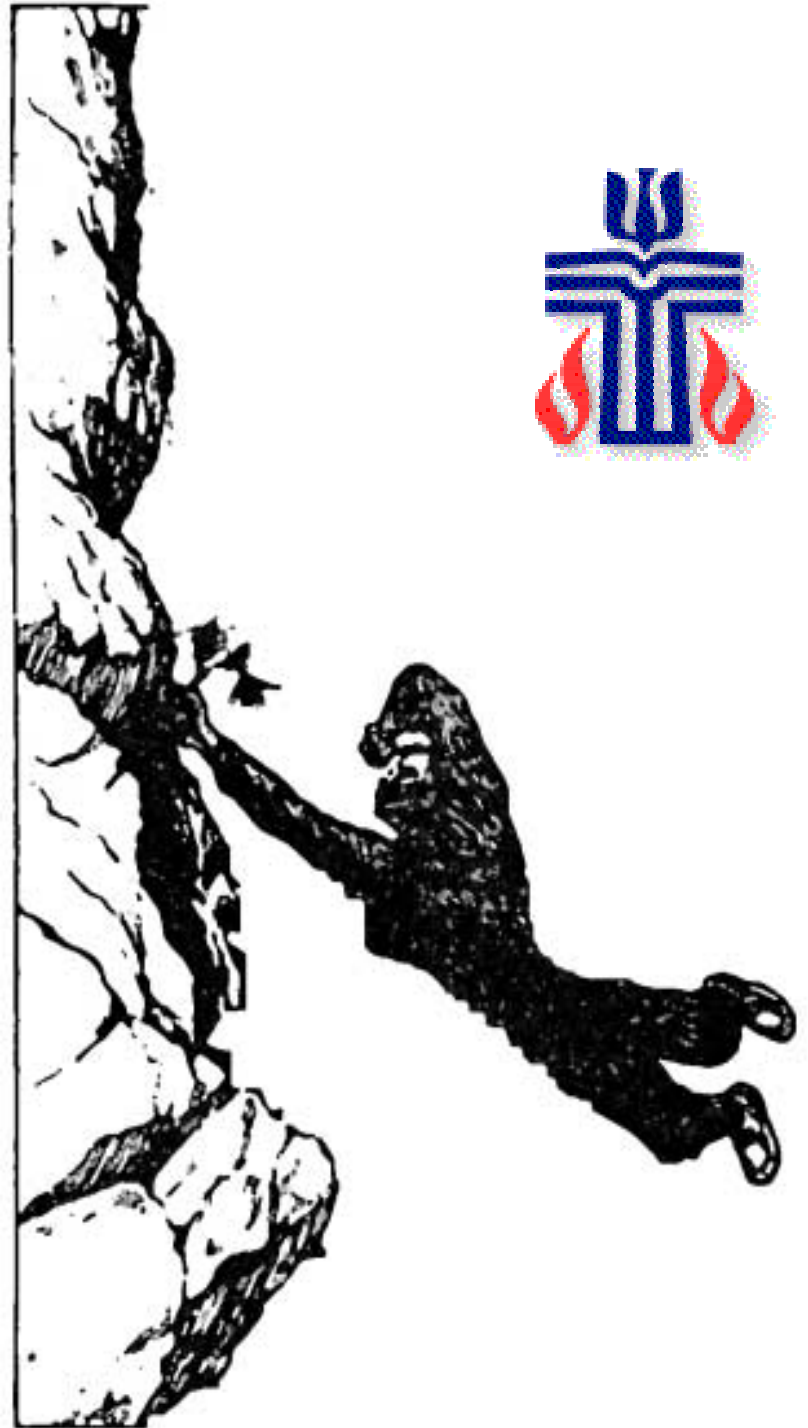
Eddie Hubbard
*Mellon Financial
Corporation*

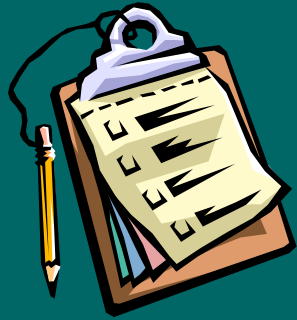


B2B E-Commerce Conference, San Francisco
June 12, 2001

Putting Faith in a New Business Process Requires:

*Letting go of
"the way we
have always done
it before"*





Today's Agenda

- Board of Pensions / Mellon Financial Corp.
- EBPP Overview: Value Propositions
- Electronic Collections: *E-Bill Application*
- Change Management & Success Factors
- Implementation Approach: *Considerations*
- Demonstration



The Board of Pensions of the Presbyterian Church (U.S.A.)

- Provides pension income, death benefits, disability protection, medical benefit coverage, retirement housing, and financial assistance to the church workers of the Presbyterian Church
- Located in Philadelphia
- 9,000 potential e-bill adopters

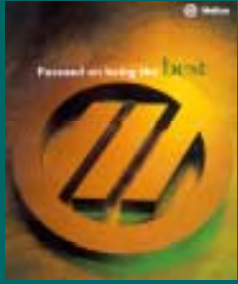




Mellon Financial Corporation

- \$46 billion super regional bank holding company
- Retail stores in PA, DE, NJ, FL and CA
- The Boston Company
- The Dreyfus Corporation
- AFCO Credit Corporation
- 55 affiliates or subsidiaries in 19 foreign countries





Mellon GCM: *An Industry & Technology Leader*

- Ranked in top 3 banks for nationwide collections in 1999 Phoenix Hecht Postal Survey
- Recognized in independent research as a leader in financial EDI and image technology
- Recognized among top 5 innovators in the Banking and Financial Services Industry in *Information Week's* 1999 listing of IT innovators
- Ranked #68 in *Computerworld* magazine's list of the 100 best organizations to work for information technology (IT) professionals

EBPP Overview

Competitive Advantage

The real advantage of E-Commerce does not lie within the technology itself, but in the application of this and other technologies to some strategic business objective.





EBPP Value Proposition: *Biller Perspective*

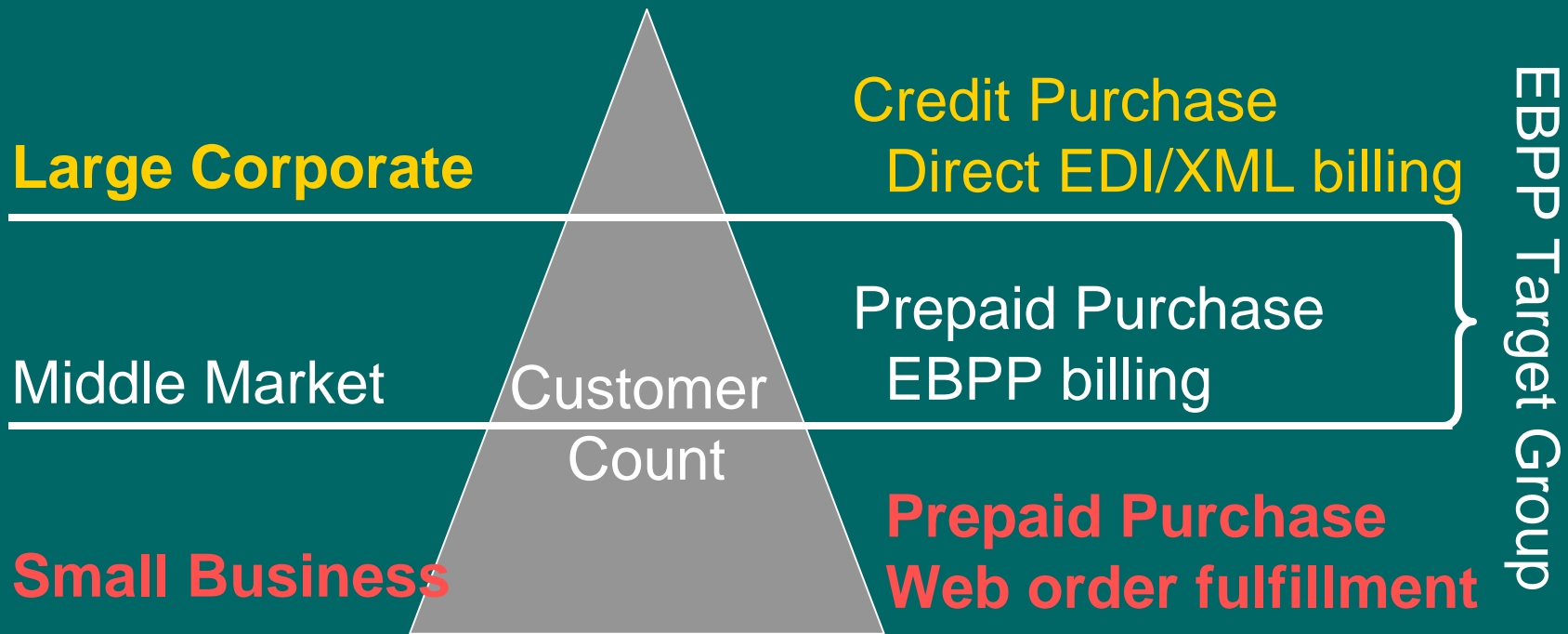
- Streamlines billing and payment receipt cycle
- Eliminates paper-based costs and time delays
- Allows billing disputes on-line *before* funds are transferred
- Improves cash forecasting ability
- Improves credit exposure management
- Provides low cost method to reach mid-tier community partners
- Provides new channel to communicate and market services to trading community



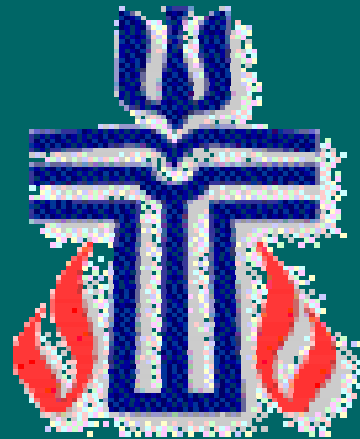
EBPP Value Proposition: *Payer Perspective*

- Enhances ability for term discounts
- Gives payment timing control
- Allows on-line dispute resolution
- Eliminates paper based costs
 - \$1.50 - paper check/envelope
 - \$10.00 - invoice event (workflow, keying)
- Provides download capabilities for integration into accounting software
- Provides on-line historical payment information
- Provides quick, accurate posting; less errors

One Biller's EC Strategy

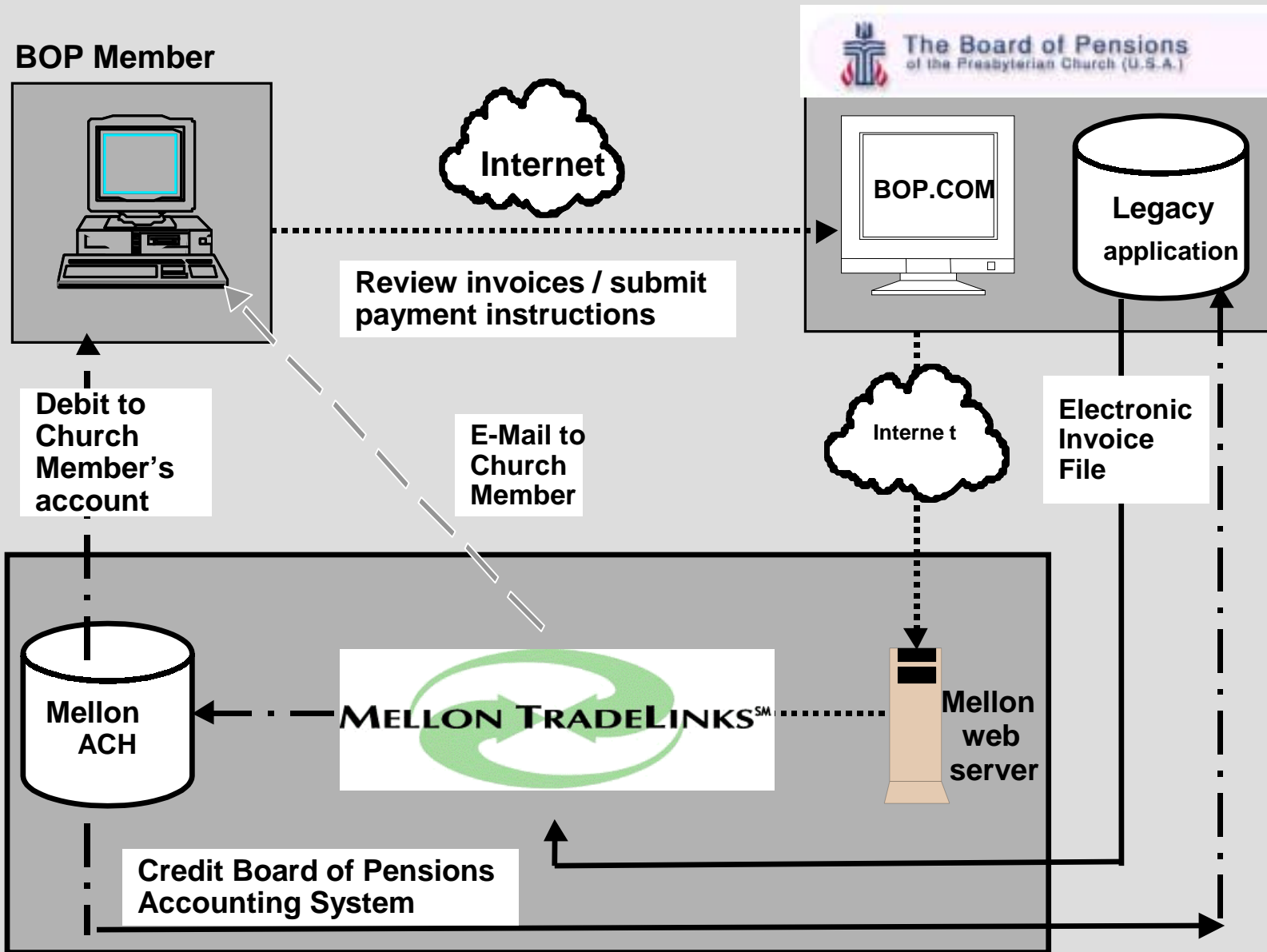


Electronic Collections: *EBPP Application*



Putting Faith in E-Bill

Electronic Collections: How it Works



Business Requirements: Board of Pensions EBPP

- Allow Church customers to receive invoices & pay their bills
- Simplicity: User-Friendly interface
- Update Membership profiles on-line
- Ability to download information for analysis
- Provide easier payment terms





Biller Direct Model: Board of Pensions EBPP

- Definition: *one-to-many relationship; linking one organization to multiple members for invoice presentment*
- Why Biller Direct for Board of Pensions?
 - Maintain church member relationships
 - Control look & feel of member views
 - Maintain privacy of the information



Change Management & Success Factors

- Focus on Core business: *Benefits Processing*
- Business Partner Experience: *Integrated Payments*
- Member Involvement: Feedback
- Marketing Material: *BoardLink Service*
- Convenient Enrollment Process
- E-mail communications
- Adjustment / Dispute Automation
- User-Friendly Process: Make it easier for your customers to do business!



Implementation Approach: *Considerations*

- Establish Clear Goals & Objectives
- Survey your customer base
- Plan Development Methodology
- Obtain Management Commitment
- Start with a Pilot: *Proof of Concept*
- Determine Security requirements
- Review / Test File Formats: System Integration
- Implement, make adjustments, and seek expansion

EBPP Demonstration


The screenshot shows a Microsoft Internet Explorer browser window displaying the login page for the Board of Pensions of the Presbyterian Church (U.S.A.). The browser's address bar shows the local file path: C:\Eddie\Customers\B-PENS\New-1\Board of Pensions Login_files\Board of Pensions Login.htm. The page features the organization's logo and name at the top. Below this, there is a 'Login Here' section with three input fields for PIN, User ID, and Password. To the left of these fields, contact information is provided: 2000 Market Street, Philadelphia PA 19103, 800.773.7752, and an email address. Below the input fields are 'Enter' and 'Exit' buttons. At the bottom of the login section, there are links for 'Forgot your Password?' and 'View a Demo'. The browser's taskbar at the bottom shows several open applications, including the current login page, a PowerPoint presentation (802B-SF.ppt), and another PowerPoint (TP-CARD.ppt). The system clock indicates the time is 10:31 PM.

Board of Pensions Login - Microsoft Internet Explorer provided by Mellon Bank

File Edit View Favorites Tools Help **Send**

Back Forward Stop Home Search Favorites History



Address C:\Eddie\Customers\B-PENS\New-1\Board of Pensions Login_files\Board of Pensions Login.htm Go Links

 **The Board of Pensions**
of the Presbyterian Church (U.S.A.)


Login Here

*2000 Market Street
Philadelphia PA
19103
800.773.7752
<mailto:invoices@pensions.org>*

PIN:
User ID:
Password:

Forgot your Password?
[View a Demo](#)



Done Internet

Start Board of Pensions Login... 802B-SF.ppt TP-CARD.ppt Board of Pensions Log... 10:31 PM

Thank You

Questions ?



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