

Employer Call Services Consulting Review

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Project Overview

Management requested to include the review on the fiscal year (FY) 2020-2021 Biennial Audit Plan because calls were not being reviewed at the time due to limited resources.

Objective

Assess the quality of employer call services for accuracy and timeliness and identify areas for improvement

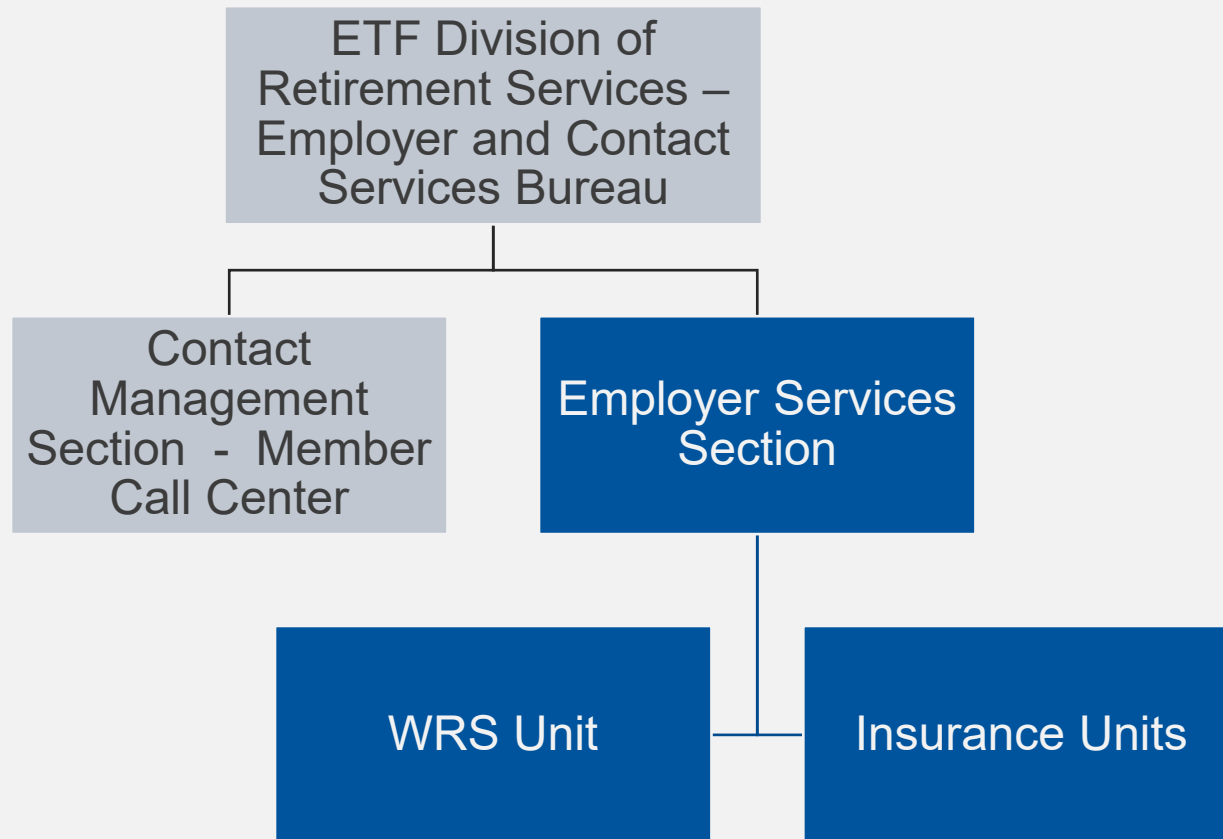
Scope

Incoming and outgoing calls during May and June 2021



Employer Communication Overview

Background – Employer Services Section (ESS)



- ESS provides Wisconsin Retirement System (WRS) and Insurance assistance via online technical support and calls and emails from employers, internal ETF staff, and members (primarily for annuitant insurance related questions).

Background - Systems

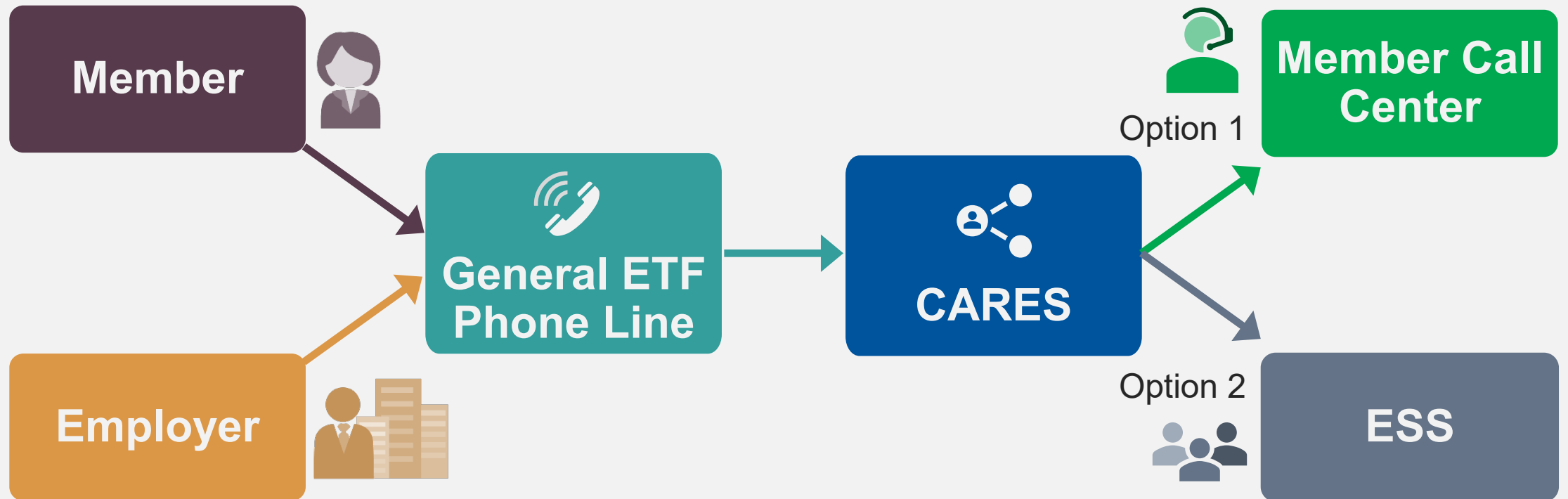
CARES – Automatic Call Distribution (ACD) Software

Employer CRM (ESCMT Access Database) – Tracks employer contact data

CallSS – Member phone contact tracking system

Various other ETF systems are used for employer and member information review

Background – Call Workflow



Background – Call Statistics

FY 2021	Total Contacts
ESS Insurance	6,482
ESS WRS	5,892
All CARES Contacts (includes member call center)	197,065



Call Review Results and Observations

Call Review Performed

Review Period (5/3/21 – 6/11/21)

	Total Contacts	Total Contacts Reviewed	Percent of Contacts Reviewed
ESS Insurance	629	57	9.1%
ESS WRS	588	52	8.8%
Total ESS	1,217	109	9.0%

Reviewed calls for:

- Accuracy of information
- Timely issue resolution
- Customer service skills
- Call notation in ETF systems

Call Review Results Summary

Positive Results

- Overall, we found ESS staff were knowledgeable, resourceful, courteous, and able to provide timely information.
- The information provided to employers and members appeared accurate based on auditor knowledge and ETF program resources.

Process Improvement Considerations

- Several potential process improvements were identified for management consideration.

Observations

- There continues to be many call transfers due to members selecting the employer option. 11 out of 74 (15%) incoming calls reviewed were instances of a member reaching ESS and having to be transferred to the member call center.

Timeliness

According to one call center industry source, the global average speed of answer is 28 seconds and the global metric for call abandonment rate is 5-8% (<https://www.liveagent.com/academy/best-practices-industry-standards/>).

Review Period (5/3/21 – 6/11/21)

	Total Contacts	Total Abandoned Contacts	Percent Abandoned	Average Speed of Answer
ESS Insurance	629	37	5.88%	18 seconds
ESS WRS	588	12	2.04%	35 seconds

FY 2021 (7/1/20 – 6/30/21)

	Total Contacts	Total Abandoned Contacts	Percent Abandoned	Average Speed of Answer
ESS Insurance	6482	478	7.37%	19 seconds
ESS WRS	5892	147	2.49%	23 seconds

- Both ESS Insurance and WRS met both the Percent Abandoned and Average Speed Answer benchmarks when considering the entire FY 2021.

Process Improvement Considerations

Expansion of management review for call quality

Consistency in making call notations in ETF systems

Consideration of additional employer satisfaction survey options

Keep non-employer/member call related tasks outside of the ACD software to improve accuracy of call statistics

Consideration – Management Call Review

- Management call quality assurance review has been limited and inconsistent.
- Limited quality assurance reviews may lead to undetected call quality concerns and may affect the ability of achieving ETF's strategy of providing an effortless customer experience.

Recommendation:

- Consider if resources are available to expand call review, especially within the Employer Services Section Insurance Unit.

Consideration – Call Notation

- Due to limitations on system integration and functionality, ESS staff are not prompted to track call data, leading to inconsistencies in what data is tracked.
- Consistent and complete data allows for transparency, efficiency, and provides the increased potential for data analysis for management planning and employer training purposes.

Recommendations:

- Consistently enter information in CallSS for contacts with information pertaining to specific members.
- Consistently enter information in the Employer CRM pertaining to contacts with employers.

Consideration – Employer Satisfaction Surveys

- Known system functionality issues, caller survey errors, and inconsistent promotion and completion of call surveys limits the effectiveness of after-call surveys.
- Limited customer satisfaction data hinders management ability to assess the quality of customer interactions in ETF's strategy of providing an effortless customer experience.

Recommendation:

- Consider additional survey options such as a periodic satisfaction survey sent to all employers, including call services as a component of the survey.

Consideration – Activity Completed in CARES

- Since ESS staff are in the CARES client throughout the day, contacts not related to customers and non-call related tasks completed in after-call work status may be inadvertently recorded in the system.
- Non-customer call and after-call work data can distort the data available for management planning purposes.

Recommendations:

- Limit calls in the CARES system to employer or member related communications.
- Return to Call Ready status after the call if work time is not needed to complete the call.



Questions?

Thank you



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