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Correspondence Memorandum

Date: May 25, 2022
To: Employee Trust Funds Board
From: Anne Boudreau, Deputy Administrator
 Division of Retirement Services
Subject: Customer Service Improvements and Trends

This memo is for informational purposes only. No Board action is required.

This document provides information about current activities in the Division of Retirement Services, including workload demand, customer use of self-service options, and process improvement projects.

Workload Demand

- **Retirement Estimates, Applications, Annuities Started**

The number of retirement estimate requests increased and the number of retirement applications decreased in the first quarter in 2022, as compared to the same quarter in 2021.

	2021	2022	Change
Q1			
Retirement Estimates Requested	7,308	7,798	6.7%
Retirement Applications Received	3,668	3,486	-5.0%
Retirement Annuities Started	2,394	2,592	8.3%

Comparing the first quarter of 2022 to the first quarter of 2021, the average turnaround time for a retirement estimate almost doubled, increasing from 6 days to 10 days. This is due in part to the increase in volume. As mentioned in my March memo, the volume of retirement estimate requests always increases in the first quarter of the calendar year due to teacher requests. Since we are comparing the first quarter of this year and last year, however, you can see that requests are trending upward.

Reviewed and approved by Matt Stohr, Administrator, Div. of Retirement Services - Electronically Signed 6/7/22

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During the same time frame, requests for appointments increased and so did wait times. This is consistent with increased retirement interest among members and is something we will continue to monitor.

- **Customer Service - Members**

Call volume was higher in the first quarter of 2022 as compared to the same quarter in 2021.

	2021	2022	Change
Q1			
Calls	50,324	55,806	10.9%
Email	6,681	6,217	- 6.9%
Total	57,005	62,023	8.8%

The average speed of answer in the first quarter of 2022 was 5 minutes and 19 seconds, compared to 4 minutes and 13 seconds in the first quarter of 2021. This is not surprising given the much higher call volume in the first quarter of 2022.

Process and Customer Service Improvements

The following highlights a few improvements in the business areas this quarter.

ETF Web Forms

ETF launched the new *ETF Web Forms* application. Members can submit the completed form online to ETF at any time and with security protection.

The first such form is the new disability retirement estimate request form. Staff will show this form to you and demonstrate the functionality at the board meeting. Other online self-serve forms will be added in the future. This new approach not only serves members as they prefer but enhances information security using capabilities co-sponsored with the Department of Administration. The security technology will eventually be utilized across state government, including as part of ETF's future Insurance Administration System.

Data Dashboards

The Division of Retirement Services and the Data Management Bureau worked in partnership to devise and develop operational dashboards that join data housed in multiple systems and databases. The dashboards provide expanded operational metrics and views to inform better business decisions and reduce manual processes to support ETF North Star reporting. Users can click on dashboards to filter and manipulate data however they need.

Some of the other advantages are the quick access to data, the ability to closely track service levels, and the visuals that turn numbers into trends and that make anomalies easy to spot.

The dashboards represent one more step—a giant leap—in ETF's data journey. They will help ETF draw connections between data points to improve business decisions and to better understand customer needs.

Staff will be available at the Board meeting to answer questions.