Customer Service Improvements and Trends Item 5C – Employee Trust Funds Board

Anne Boudreau, Deputy Administrator Division of Retirement Services



Informational item only

No Board action is required.





ETF Work Volume and Retirement Trends



North Star Dashboards

ē.	A) Beneficiary Designation			B) Contacts with ETF (Calls)				B) Contacts with ETF (Email)			
	Q3 2022	Q3 2023	SLA	Q3 2022	Q3 2023	SLA 🕜	I	Q3 2022	2 Q3 2023	SLA	
I	99.6%	99.6%	90%	63.9%	73.7%	70%	I	100.09	6 100.0%	95%	
	C) Retirement Estimates			D) Retirement Applications				E) Appointments			
	Q3 2022	Q3 2023	SLA	Q3 2022	Q3 2023	SLA	ł	Q3 2022	Q3 2023	SLA	
	5.6	6.0	15	73.0%	77.0%	90%	L	36.2	29.7	15 6	
П	F) Payment Set-up		G) Death Benefit Estimates								
I	Q3 2022	Q3 2023	SLA	Q3 2022	Q3 2023	SLA					
	100.0%	100.0%	100%	94.0%	98.0%	90%					

Retf

Retirement Data - Quarter 3







Customer Service - Quarter 3



■ 2022 ■ 2023



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ETF Operational Improvements



Customer Interactions

Continuous incremental improvements as we strategically build for the future – *One ETF Voice*.



Customer Service Improvements





Process Improvements



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Questions?

Thank you









