



**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
 A. John Voelker  
 SECRETARY

Wisconsin Department  
 of Employee Trust Funds  
 PO Box 7931  
 Madison WI 53707-7931  
 1-877-533-5020 (toll free)  
 Fax 608-267-4549  
[etf.wi.gov](http://etf.wi.gov)

## *Correspondence Memorandum*

**Date:** March 4, 2024

**To:** Employee Trust Funds Board

**From:** Anne Boudreau, Deputy Administrator  
 Division of Benefits Administration

**Subject:** Customer Service Member and Employer Data, 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 Benefits Administration, including member and employer workload demand, process improvements, and trends.

### **Workload Demand**

#### Retirement Estimates, Applications, Annuities Started, Lump Sum Benefits

Comparing the fourth quarter of 2023 to that same quarter in 2022, the number of retirement estimate requests, applications, annuities started and retirement lump-sum benefits paid decreased.

	<b>Q4 2022</b>	<b>Q4 2023</b>	<b>Change (%)</b>
Retirement Estimates Requested	4,782	4,646	-2.8%
Retirement Applications Received	2,862	2,605	-9.0%
Retirement Annuities Started	1,438	1,229	-14.5%
Retirement Lump Sums Paid	672	599	-10.9%

Comparing the fourth quarter of 2023 to the fourth quarter of 2022, the average turnaround time for a retirement estimate slightly increased from 5.6 days in 2022 to 6.0 days in 2023.

#### Customer Service – Members

Call volume decreased in the fourth quarter of 2023 as compared to the same quarter in 2022.

Board	Mtg Date	Item #
ETF	03.28.24	6B

	Q4 2022	Q4 2023	Change (%)
Calls	50,361	41,713	-17.2%
Email	5,068	3,848	-24.1%
Total	55,429	45,561	-17.8%

The average speed of answer in the fourth quarter of 2023 was 1 minute, 43 seconds, compared to 5 minutes, 45 seconds in the fourth quarter of 2022. This improved speed was primarily due to lower call volume. Recall that in the fourth quarter of 2022, the departure of WEA Trust health plan and the changes to the W-4P tax form for retirees were causing many more member contacts (both calls and emails).

## Customer Service and Process Improvements

### Detailed Information for County Jailer Members

A new section on the ETF website provides centralized information and an educational video about 2023 Wisconsin Act 4 for Jailers, which was effective January 1, 2024. Some of the information on the page describes who is affected, what actions they need to consider, when decision deadlines occur, and how contribution rates can change. This page also includes frequently asked questions, and members are encouraged to use the WRS Retirement Benefits Calculator to see the impact of a change in employment category.

More details of the results of the new law will be shared at the June board meeting.

### Better Metrics to Improve Customer Service

Developed new dashboards to help us better serve our members in the following categories:

- Appointment scheduling metrics will help us determine the most popular scheduling times, so that we can explore options such as more targeted appointment times.
- Data showing the average and median time between member retirement estimates and applications will help us predict spikes in applications and better plan for that workload.
- A new dashboard showing monthly annuities and lump-sum payments will let us view detailed payment information at a glance.
- Call transfer data will be more detailed, by date and time, agent, caller, and business unit to analyze reasons for the transfer, effectively optimize our resources and improve customer service.

### Upgraded Call System

The Member Call Center successfully upgraded to Centurion CARES 15.3, which is a new version of our call routing system. One of the more significant improvements is an automatic switchover to a backup system if/when the primary call routing system fails. Previously, operations and technical staff would have to investigate any issue and then

manually switch devices over to the backup system. This change helps prevent an outage for the call center and our members.

Another significant improvement is the addition of “whisper” functionality. This allows a call center agent and a supervisor or lead worker to communicate without the member hearing their conversation. This comes in handy when the agent needs assistance, resulting in a smooth customer experience for the member who is unaware that a behind-the-scene conversation took place.

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