

Customer Service Member and Employer Data, Improvements, and Trends

Item 6B – Employee Trust Funds Board

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Division of Benefit Administration



Informational item only

No Board action is required.



Member Retirement Data and Trends

North Star Dashboards

A) Beneficiary Designation

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|-----|
| 93.5% | 99.6% | 90% |

B) Contacts with ETF (Calls)

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|-----|
| 59.5% | 81.3% | 70% |

B) Contacts with ETF (Email)

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|-----|
| 100.0% | 100.0% | 95% |

C) Retirement Estimates

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|-----|
| 5.4 | 29.7 | 15 |

D) Retirement Applications

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|-----|
| 73.0% | 77.0% | 90% |

E) Appointments

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|-----|
| 35.6 | 30.9 | 15 |

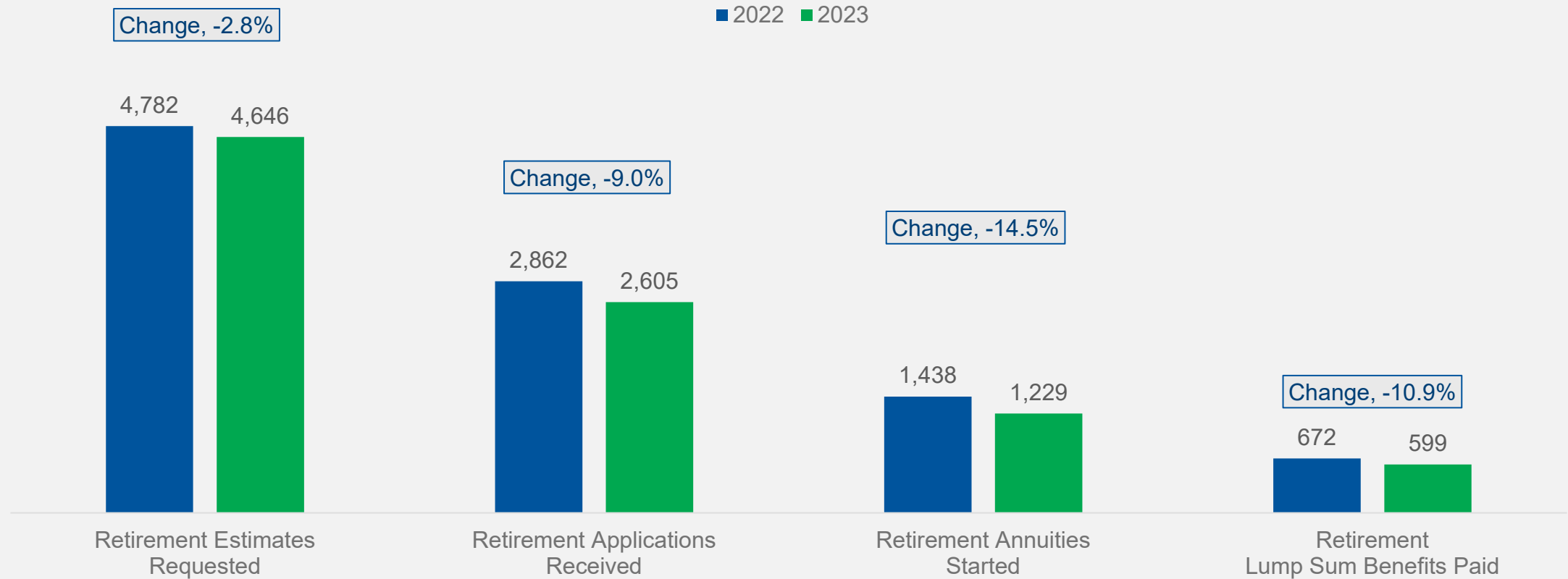
F) Payment Set-up

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|------|
| 100.0% | 100.0% | 100% |

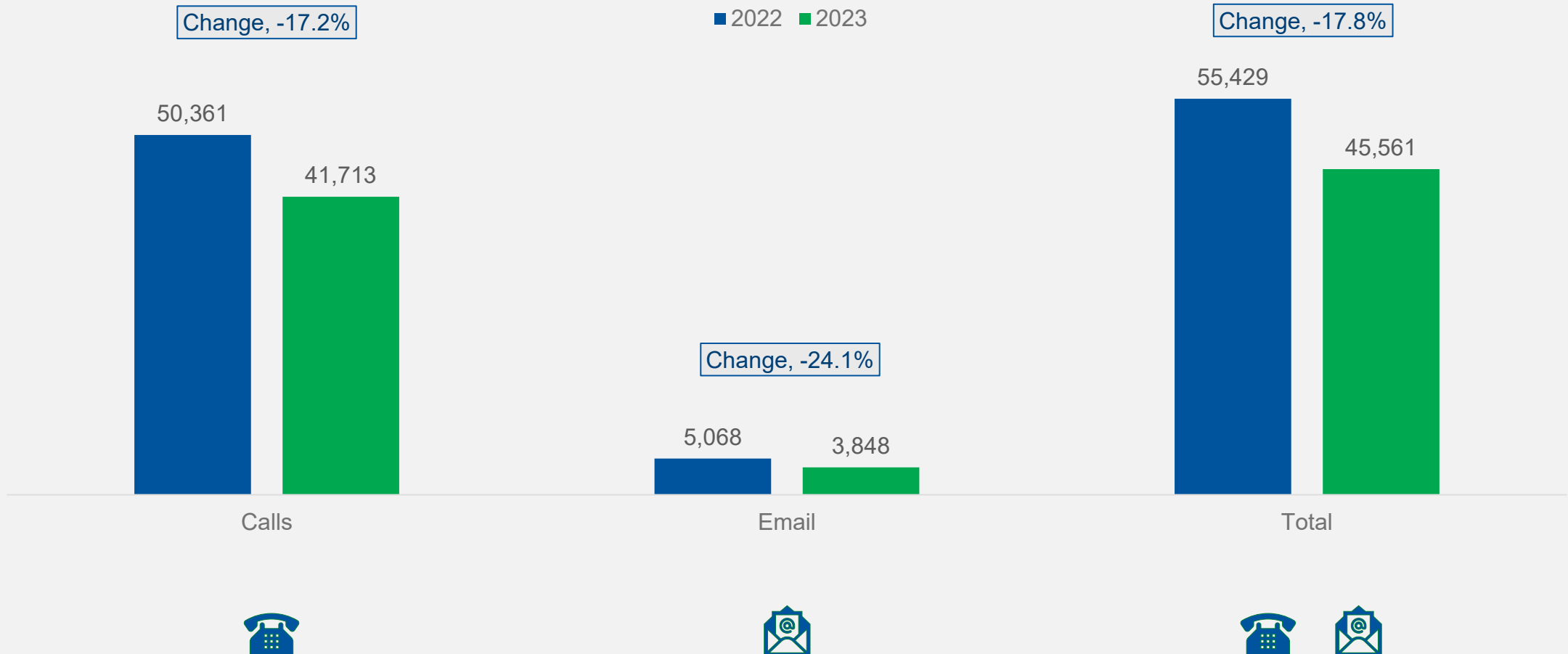
G) Death Benefit Estimates

| Q4 2022 | Q4 2023 | SLA |
|---------|---------|-----|
| 97.0% | 98.0% | 90% |

Retirement Data – Quarter 4



Customer Service - Quarter 4






New WRS Employers

New Employers – 2024

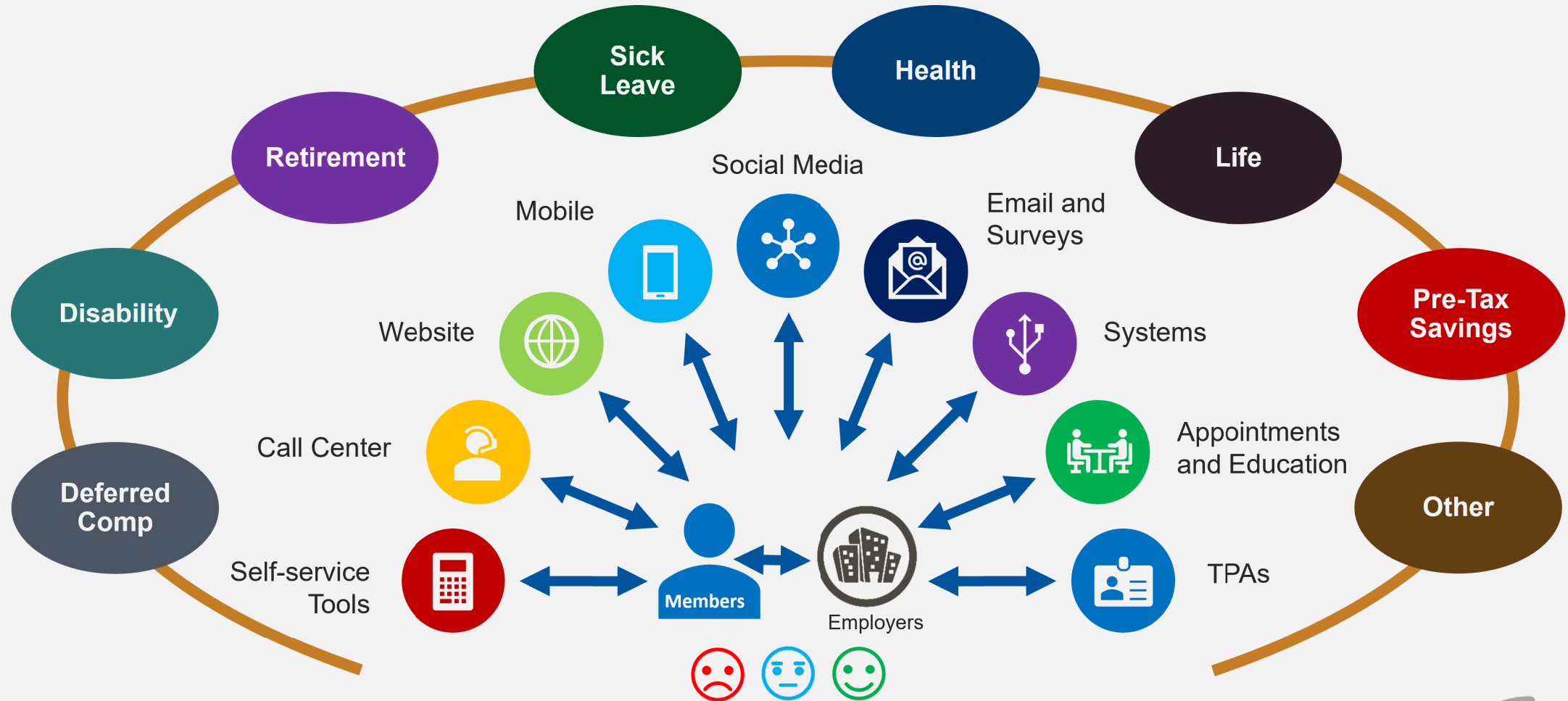
| | New Employers | WRS Eligible Employees |
|-----------------|---------------|------------------------|
| School District | 3 | 29 |
| City | 1 | 66 |
| Town | 19 | 28 |
| Village | 6 | 17 |
| Other | 3 | 5 |
| TOTAL | 32 | 145 |

A photograph of a family of three—a woman, a man, and a young girl—walking together on a dirt path through a lush, green forest. The woman is on the left, the man is on the right, and the girl is in the center, slightly in front of them. They are all smiling and appear to be enjoying their time outdoors. The image is overlaid with a semi-transparent dark blue filter.

ETF Operational Improvements

Customer Interactions

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



Customer Service Improvements



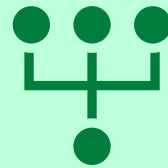
Detailed Information
for County Jailer
Members

Process Improved – Metrics



Better Metrics to
Improve Customer
Service

Process Improved – Call Routing



Upgraded Call
Routing System



Questions?

Thank you



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