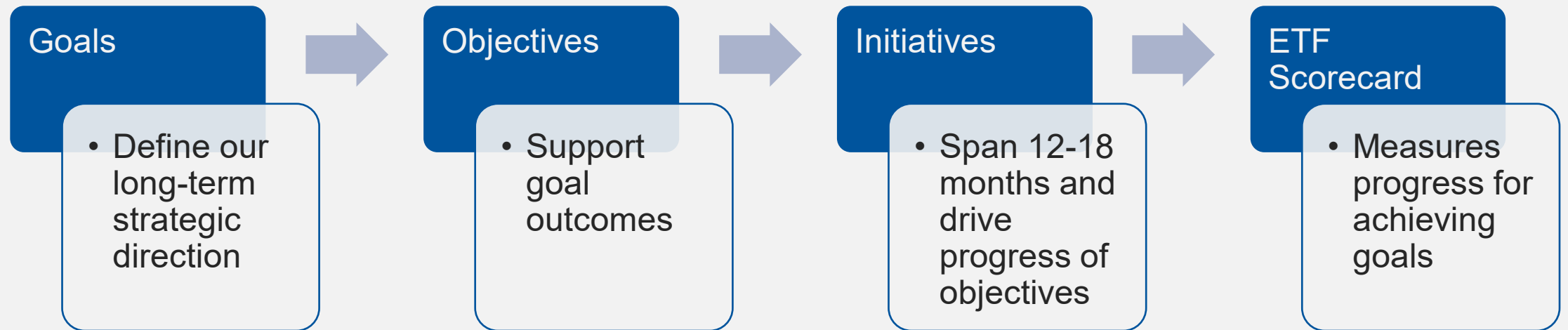# Informational Item Only

No Board action is required.

Agenda

- Review FY24 Strategic Plan Accomplishments

- Introduce ETF's FY25 Strategic Plan

- Next Steps

ETF Strategic Plan Framework

Goals
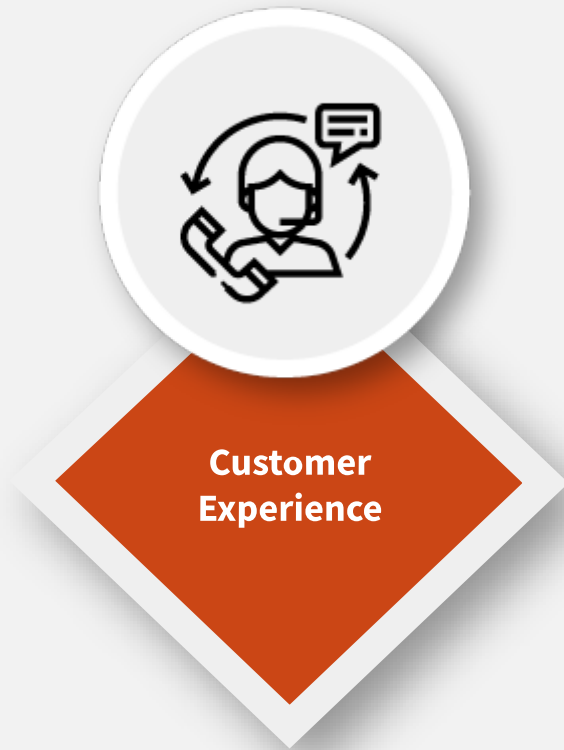- Define our long-term strategic direction

Objectives
- Support goal outcomes

Initiatives
- Span 12-18 months and drive progress of objectives

ETF Scorecard
- Measures progress for achieving goals

ETF Strategic Plan

FY24 Accomplishments

FY 24 Goal 1: Customer Experience Objectives

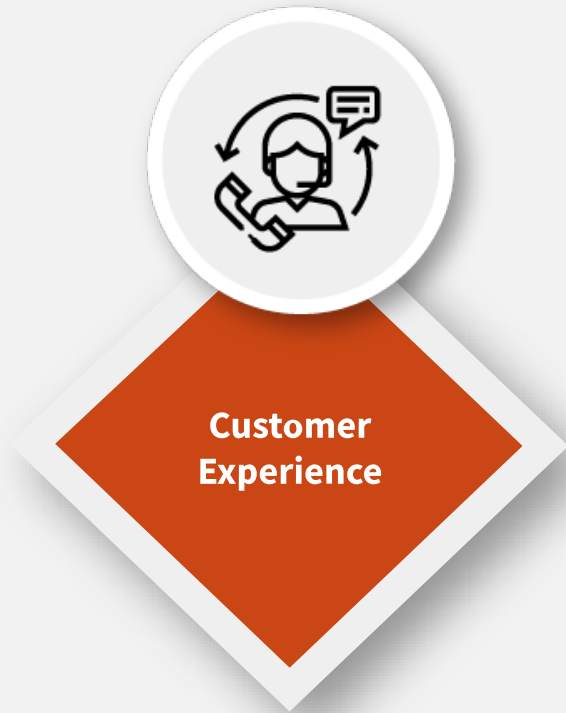**Customer Experience**

- Increase employer competency for managing employee benefits

- Determine the strategy, programs, and organizational infrastructure needed to drive customer experience improvements

- Ensure insurance program sustainability
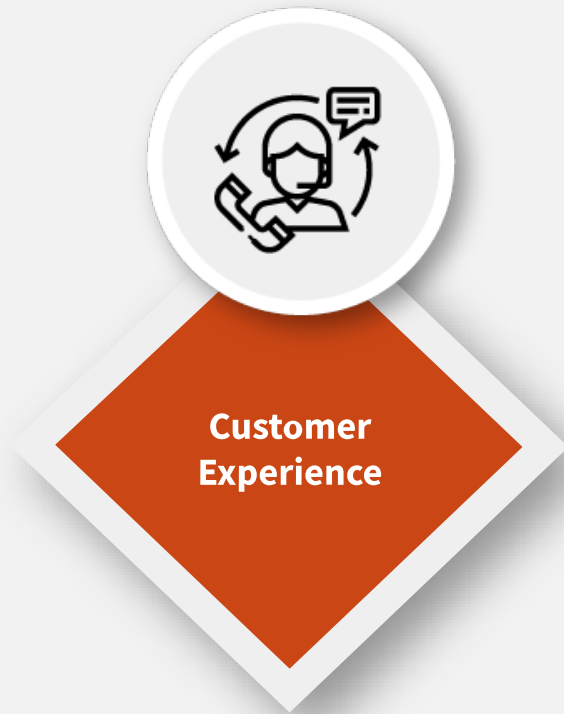
FY 24 Goal 1: Customer Experience
Accomplishments

Customer Experience

- Completed the modernization of five additional WRS Employer training modules for employers

- Insurance program sustainability activities moved to operational status

- Developed retiree customer personas to better understand the needs of this customer group

FY 24 Goal 1: Customer Experience
Initiative Highlights

Customer Experience

Customer Experience

To better understand our customers, ETF creates **personas** to represent member and employer groups.

- Fictional characters based on aggregate data

- Intended to represent the real customer

- Personas identify customer preferences, needs, and goals throughout their journey with ETF

FY 24 Goal 2: Performance & Process Management
Objective

Performance & Process Management

- Improve operational performance management through effective process management, performance metrics, controls, and improvement initiatives

FY 24 Goal 2: Performance & Process Management
Accomplishments

Performance & Process Management

Ongoing progress documenting future-state Insurance Administration System processes, with 109 future-state processes documented

FY 24 Goal 3: Talented Workforce
Objectives

Talented Workforce

- Attract, integrate, and advance top talent

- Advance employee development through meaningful and intentional performance management approaches

- Build the culture, recruitment, and retention practices that will make ETF an equitable and inclusive organization

FY 24 Goal 3: Talented Workforce
Accomplishments

Talented Workforce

- Completed foundational work for skills assessment framework

- Completed first year of the Employee Performance Management System

- Completed assessment and recommendations to develop supervisor training to support employee performance outcomes

- ETF Equity and Inclusion Plan: FY2024-2026 Year 1 approved action items

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FY 24 Goal 3: Talented Workforce
Initiative Highlights
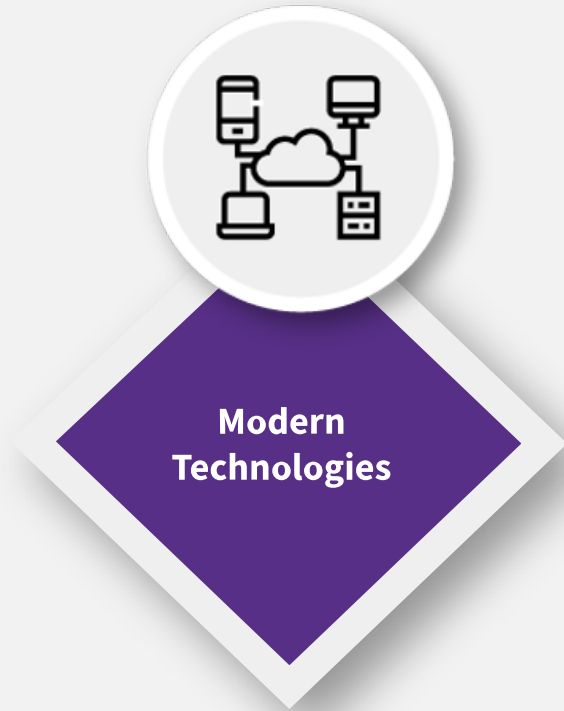
Talented Workforce

ETF Equity and Inclusion Plan: FY2024-2026 Year 1

Increased collaboration efforts between Wellness Committee and Inclusion, Diversity Equity and Advancement (IDEA) Committee:

- New book club

- Continued Staff Network Group development

FY 24 Goal 4: Modern Technologies
Objectives

Modern Technologies

- Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services

- Integrate systems and processes to support an effortless customer experience

- Preserve the safety and security of all ETF systems and data through standard practices, appropriate security controls, risk management and information security technologies

FY 24 Goal 4: Modern Technologies
Accomplishments

Modern Technologies
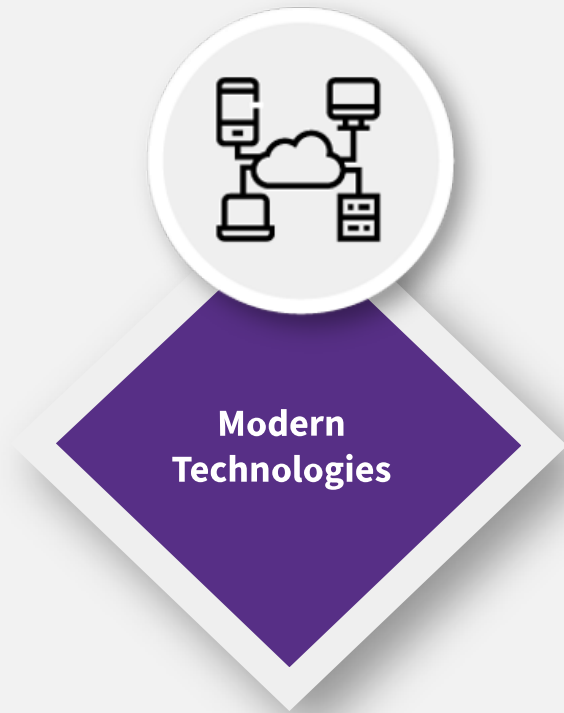
- Enterprise Content Management system operationalized

- Insurance Administration System Progress

- Information Risk Management Program security implementations

- Data Management and Technology Programs operationalized

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FY25 Strategic Plan

FY 25 Strategic Planning Process

Ongoing collaboration between Strategic Council, Agency Management Council and Board of Managers to:

- Broaden operational and strategic insights

- Empower and engage leadership
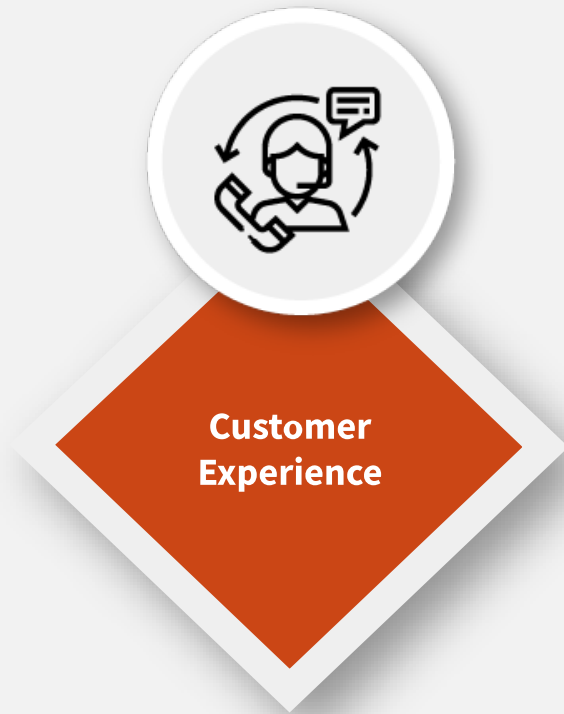
- Co-author ETF's strategy

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FY 25 Strategic Plan: Changes

- Updated two Strategic Objectives

- Added "Relational Operational Efforts" to the plan to highlight ongoing work supporting strategic outcomes

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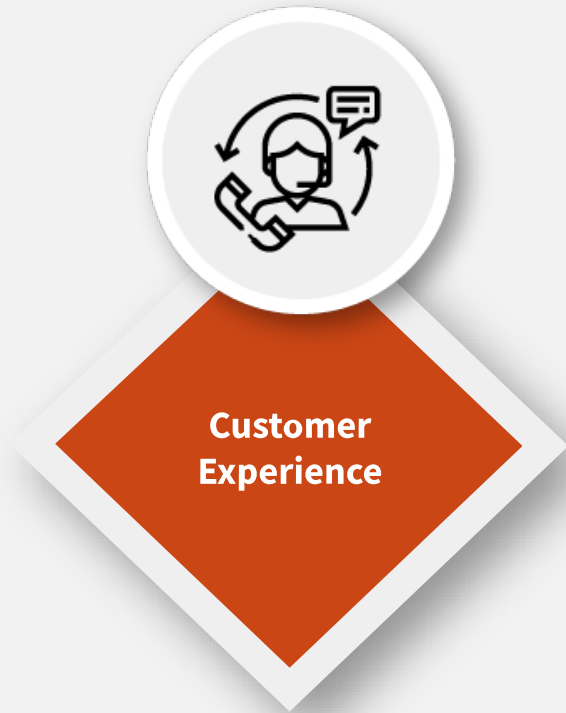# FY 25 Goal 1: Customer Experience
Objectives

Customer Experience

- Increase employer competency for managing employee benefits

- Ensure insurance program sustainability

- Determine the strategy, programs, and organizational infrastructure needed to drive customer experience improvements

FY 25 Goal 1: Customer Experience
Initiative Highlights

Customer Experience

Customer Experience

Expand persona library to complete employer and other personas

- Gain better insights about different customer segments

- Begin creating customer journey maps to understand customer segment interactions throughout their journey with ETF

FY 25 Goal 2: Performance & Process Management
Objectives

Performance & Process Management

- Optimize processes to leverage capabilities of modernization initiatives

FY 25 Goal 3: Talented Workforce
Objectives

Talented Workforce

- Attract, integrate, and advance top talent

- Advance employee development through meaningful and intentional performance management approaches

- Build the culture, recruitment and retention practices that will make ETF an equitable and inclusive organization

FY 25 Goal 3: Talented Workforce
Initiative Highlights

Talented Workforce

Define the framework and roadmap for a new Office of Enterprise Risk Management

- Establish guiding principles, set standards for risk-based decision making

Framework and roadmap efforts include:

- Defining OERM scope and responsibilities

- Identifying staffing needs

- Inventorying current-state organizational risk management practices

FY 25 Goal 4: Modern Technologies
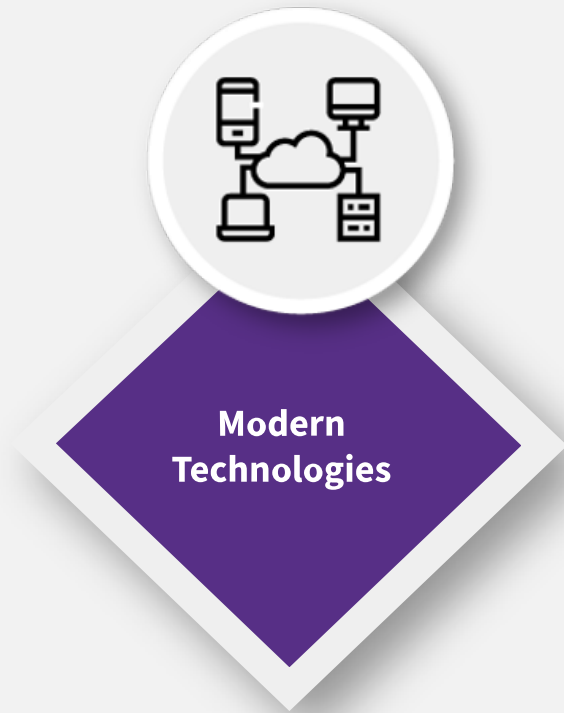## Objectives
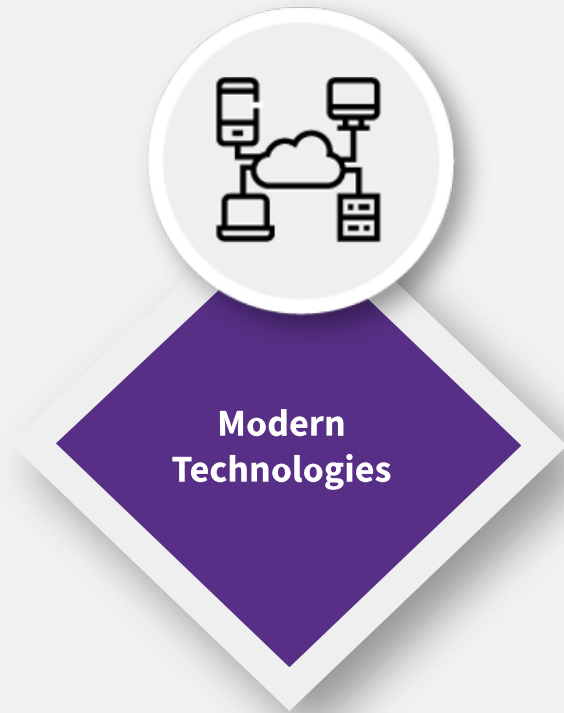
Modern Technologies

- Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services.

- Integrate systems and data to support an effortless customer experience.

- Preserve the safety, security and sustainability of all ETF systems and data through standard practices, appropriate security controls, risk management, and information security technologies.

FY 25 Goal 4: Modern Technologies
Initiative Highlights
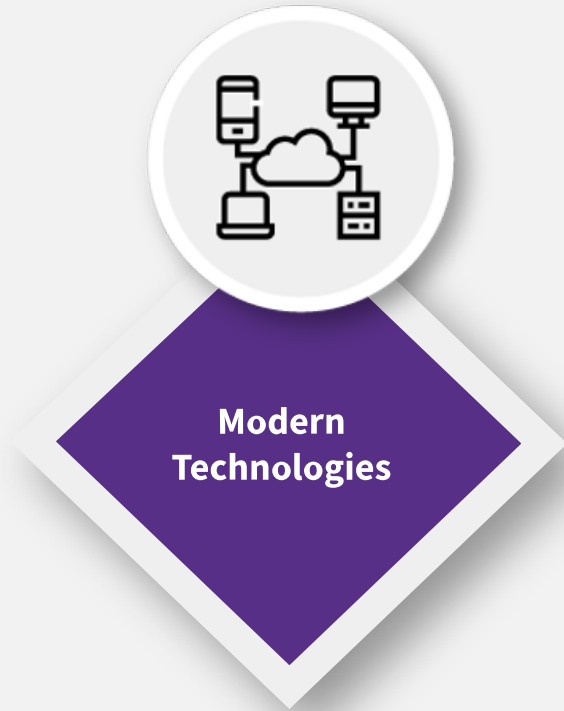
Modern Technologies

Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services.

- Insurance Administration System efforts focused on system and program readiness efforts for successful user experience

- Pension Administration System efforts focused on Request for Proposal and vendor selection

FY 25 Goal 4: Modern Technologies
Initiative highlights

Modern Technologies

Preserve the safety, security and sustainability of all ETF systems and data through standard practices, appropriate security controls, risk management, and information security technologies.

- Mature operational processes

- Manage third-party information risk

- Develop roadmap to ensure sustainability of ETF's applications and systems

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Next Steps: Resource Prioritization

Ensure alignment of resources to priorities

Continue refining data for reporting and decision-making

Next Steps: Governance

Focus: continuing to strengthen and mature governance processes

Strategic Council	Agency Management Council	Data Governance Council	Portfolio Committee
• Setting the agency's strategic direction and defining priorities	• Enhancing alignment of business operations • Collaborating to improve agency performance • Approving agency policies	• Oversight of the agency's data lifecycle from creation, use, storage, and confidentiality	• Resource prioritization oversight • Recommendations for project alignment

Questions?

Thank you

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wi_etf   etf.wi.gov   ETF E-mail Updates   608-266-3285
1-877-533-5020