

# Customer Experience Updates

## Item 5A – Employee Trust Funds Board

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Employer Services

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Customer Experience and Business Initiatives

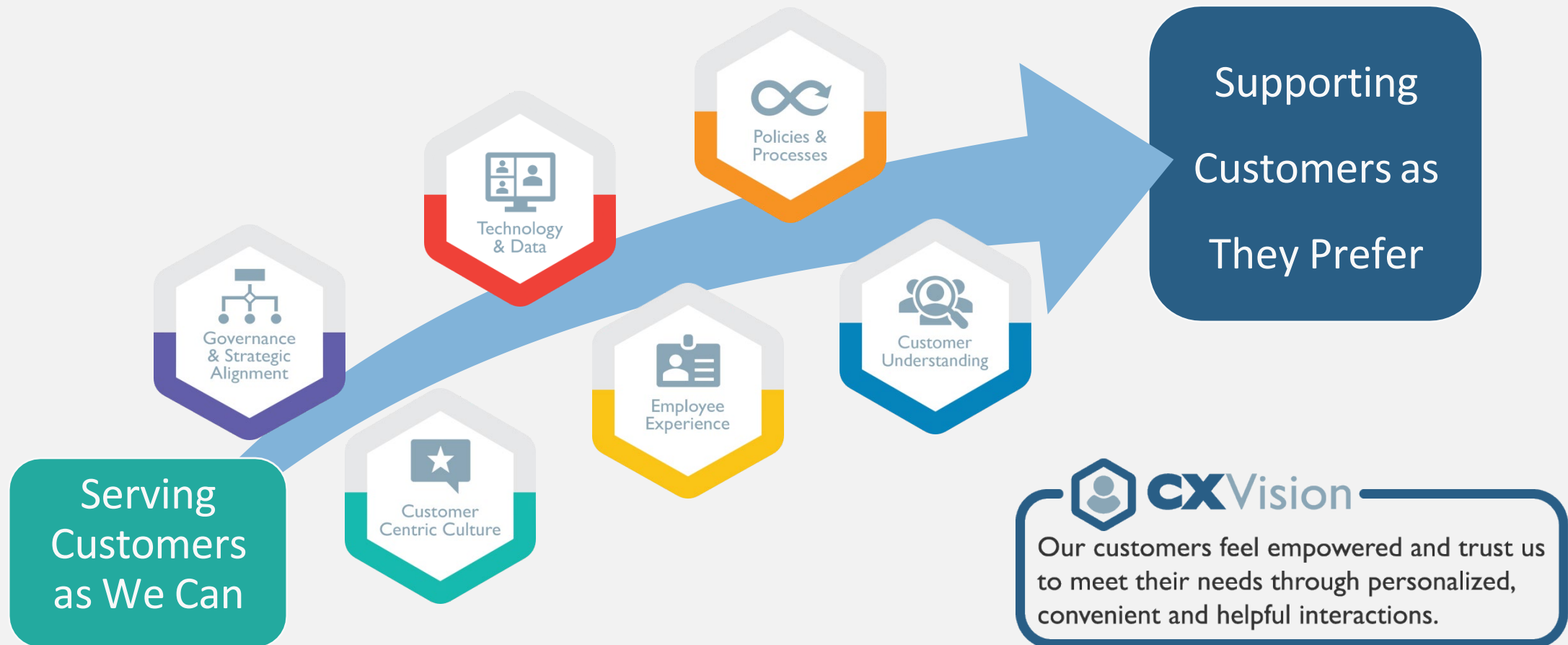


# Informational Item Only

No Board action is required.



# Transforming with CX in Mind



# Member Experience

# My Benefits Portal



- **Members can now get their WRS balances online!**
- Members have downloaded 78,200 current-year statements since March

*“For the first time in my career here at ETF, I can finally tell members that they can get their statement/balance online.”*

ETF MSB Trainer



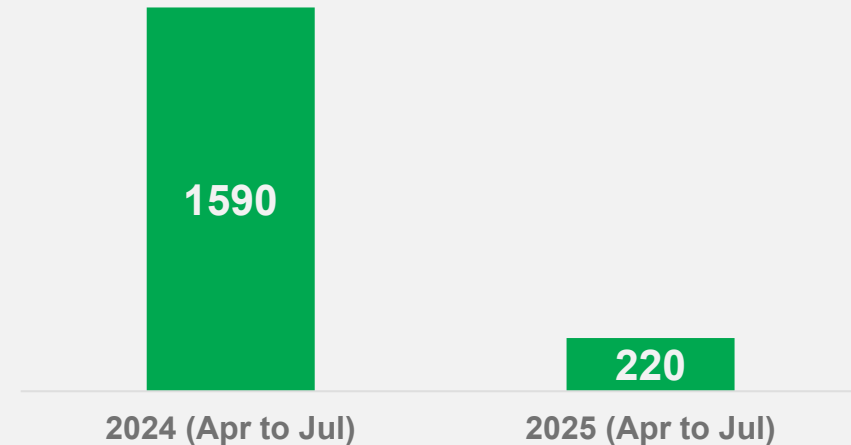
# Savings on Statements

**1370 fewer statements  
mailed** in this four-month  
period

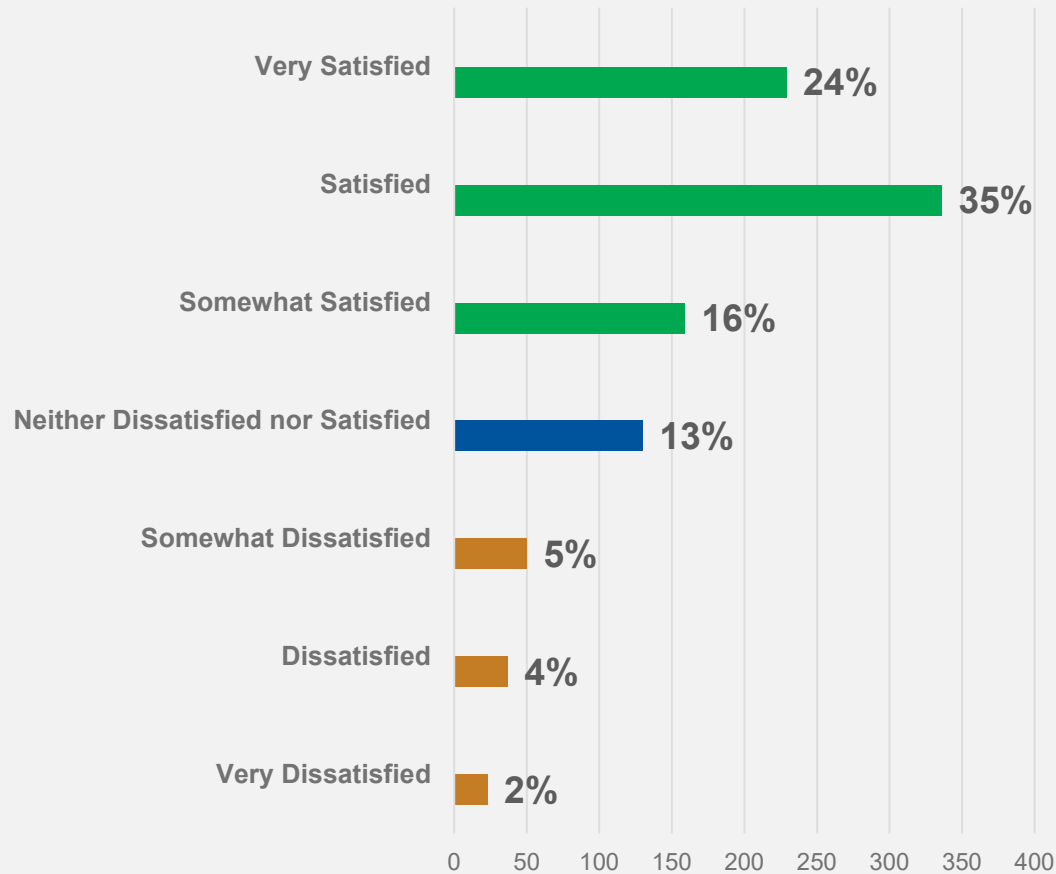
**435 staff hours saved,**  
equivalent to 36 hours per  
week or 0.9 FTE

**\$812.41 saved in  
postage,** plus savings on  
supplies (paper, printing,  
envelopes)

Mailed Duplicate Statement Requests



# IAS Member Satisfaction



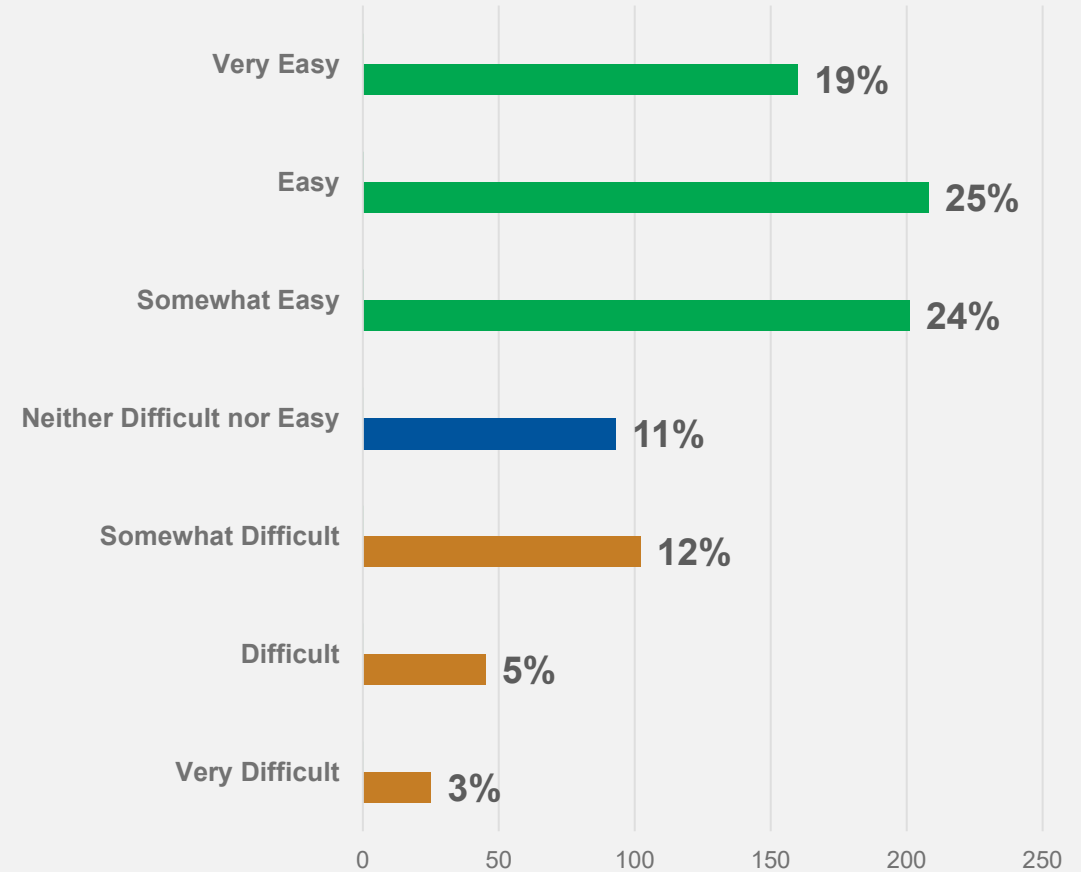
- 964 members took a short survey after using **My Insurance Benefits**
  - **75% expressed satisfaction** (somewhat to very satisfied)
  - 11% said they were somewhat to very dissatisfied
  - 2 months of data since IAS go-live (July and August)



# IAS Ease of Use



- 834 members answered a second survey question on ease of use in **My Insurance Benefits**
  - 68% found it somewhat to very easy
  - 20% found it somewhat to very difficult



# Process Improvements



- Mainframe forms enhancements
- Securely sending documents through OnBase
- Locating lost contacts
- Employer statement improvements for disability retirements

# Employer Experience

# Employer Training

Wisconsin Retirement System Unit (WU)

Amber Condon –  
Employer Trainer



Employer Insurance Unit (EIU)

Jake Spielbauer –  
Employer Trainer

# Training To Enhance CX



Updated WRS  
training to  
eLearning format

Created & delivered  
new content for IAS

# WRS Training Updates



11 training topics updated to eLearning format

- Based on WRS administrative employer tasks

eLearning format features:

- Paced for learner's preferences
- Learner drives timing and content direction
- Includes interactive knowledge checks
- Responsive design
- Easy to access

# IAS Training Updates



## Pre-2025 Launch Training

- On-demand member experience video
- Nine live virtual courses for employers & staff
- Dozens of training sessions held over four months
- Hundreds of employers & staff trained

## Employer Resources

- HR Administrator Guide
- Qualifying Life Event & Change Reason Companion Guide
- Employer Transaction Application Guide
- Employer IAS Procedures

## IAS & Open Enrollment

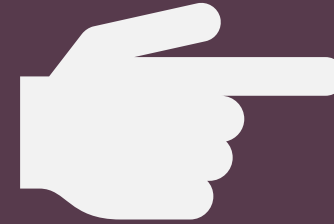
- UWs personnel will use My Insurance Benefits for 2026 Open Enrollment
- UWs-Only Kickoff Session
- Employer & Employee considerations

# Employer Feedback



## WRS eLearning Content

- Overall positive employer experience
  - More engaging
  - Appreciate the on-demand availability



## IAS rollout

- Employer surveys
- Phase 2—May 1, 2026: DOA go-live
- Phase 3—July 1, 2026: All other employers



# Future Employer Training



Continue updating training library

Create new content

Adapt IAS training before Phase 2&3 go-live

# Employee Experience

# CX Persona Library



## Personas

- Fictional characters who represent real ETF customers
- Help convey customer goals, behaviors, needs, pain points, and challenges



# New Employer Profiles

## Large Employer

This profile represents employers like UW, UWHC, state agencies, large and medium cities and villages, and counties.



## Small Employer

This profile represents employers like towns, villages, small cities, hospitals, sewer districts, and other miscellaneous small employers.



## School District

This profile represents 421 school district employers of all sizes across Wisconsin.



# Small Employer Profile

## Small Employer



### Employees Served

- Small local employers serve anywhere from 1 to 50 employees.
- 62% have fewer than 10 employees.



### Benefits Offered

- Small local employers are more likely to offer Health Insurance than large locals. 383 (40%) of them offer Health Insurance.
- The most popular program option is P02 (It's Your Choice Local Traditional with Dental Option), followed closely by P12 (same program without dental).

Towns  
Villages  
Small Cities  
Hospitals  
Sewer districts and other  
misc. small employers



### How They Work

- Small employers often use ETF's user interfaces to report new hires, terminations, and service and earnings data.
- Small employers often have only one employee tasked with WRS reporting to ETF, and they have greater levels of turnover in their HR/Payroll/Admin staff. Thus, their staff using ETF systems often have little to no experience in benefit administration, creating the need for frequent training and re-training.



### By the Numbers

946 employers in this segment

8,321 active members served

Note: Does not include any school districts, state agencies, UW, or UWHC



### CX Vision

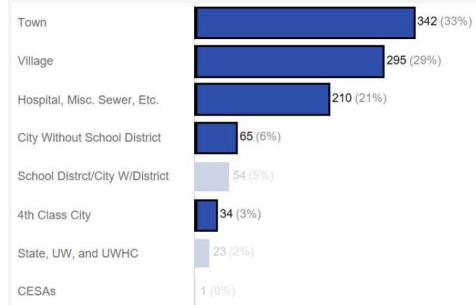
Our customers feel empowered and trust us to meet their needs through personalized, convenient and helpful interactions.

# Small Employer (cont.)

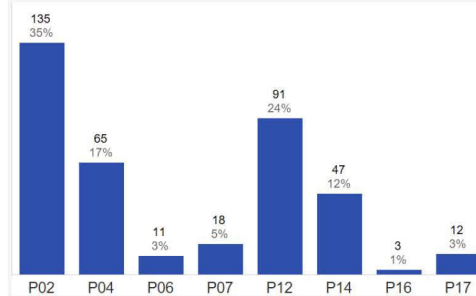
## Small Employer

Data Updated: July 7, 2025

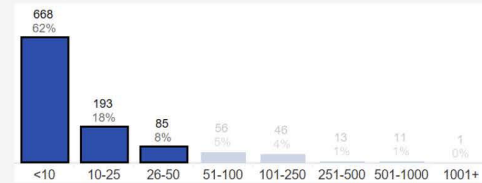
### Employer Type



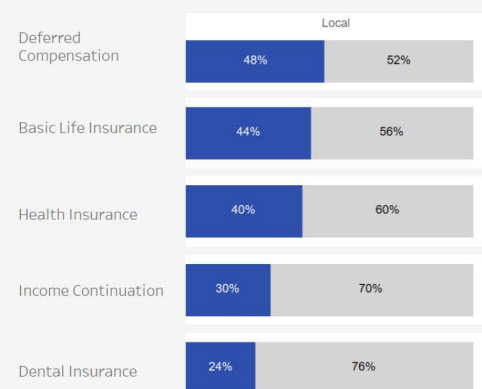
### Health Insurance Program Option among employers offering health insurance



### Count and % of Employers, by Employee Count Groups



### Benefits Offered





# Internal Enhancements

- IVR enhancements to aid staff taking health insurance calls
- Ombuds move to OnBase – more visibility for staff, better reporting





# Customer Centric Culture

- CX Workgroup – new faces, new ideas, better representation
- CX Champions and spotlighting team success stories
- IAS member survey results in balanced scorecard for 2026



**CX**Vision

Our customers feel empowered and trust us to meet their needs through personalized, convenient and helpful interactions.



The background of the slide features a bokeh effect with numerous out-of-focus circles in shades of blue and purple, creating a soft, abstract pattern.

# Questions?