

# Update on ETF's Strategic Plan Implementation

Rob Marchant, Deputy Secretary

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# ETF Vision Statement

To become a leader among large public employee benefit systems by offering best practice customer services to our members.

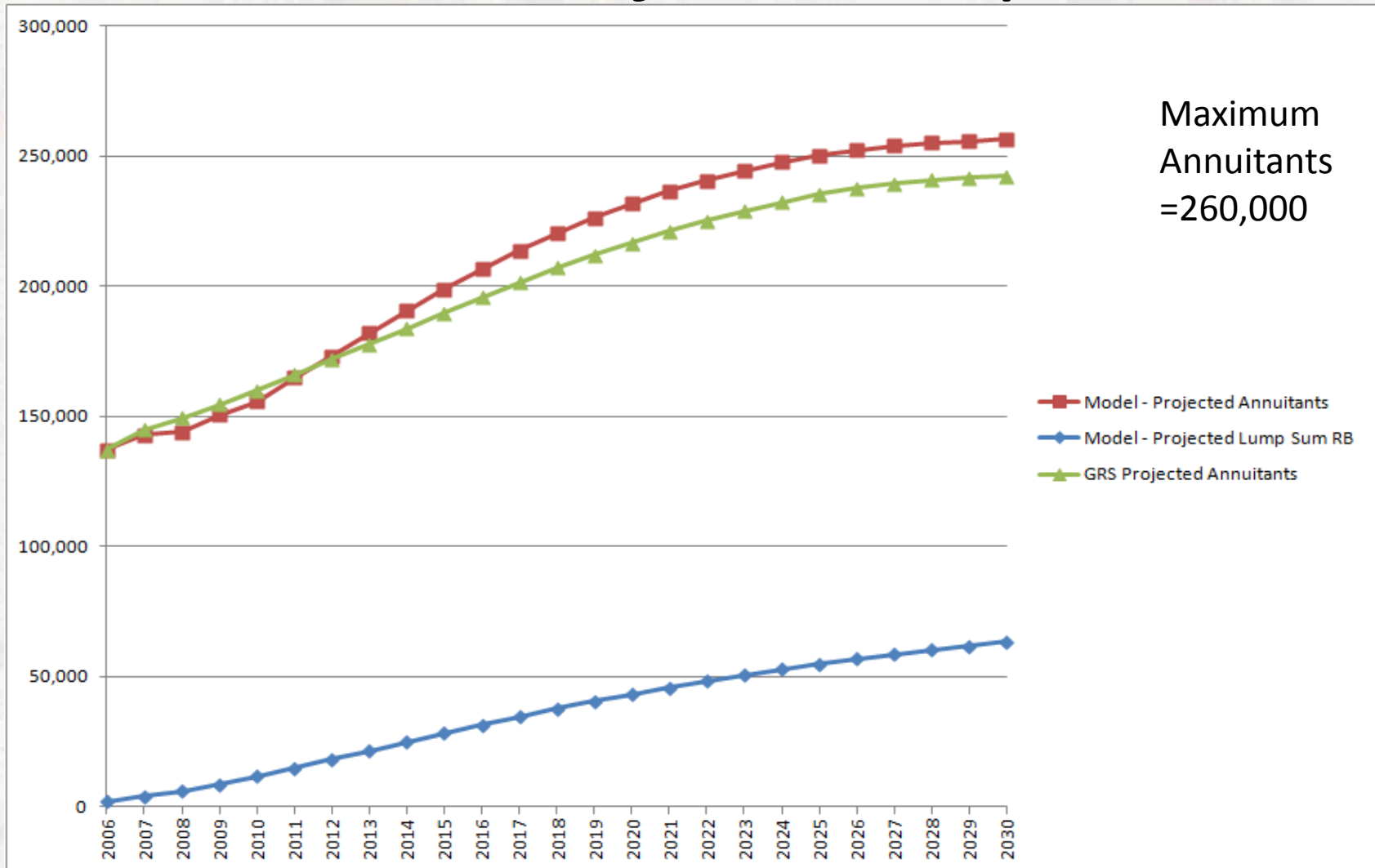
## ETF Strategic Priorities and Goals

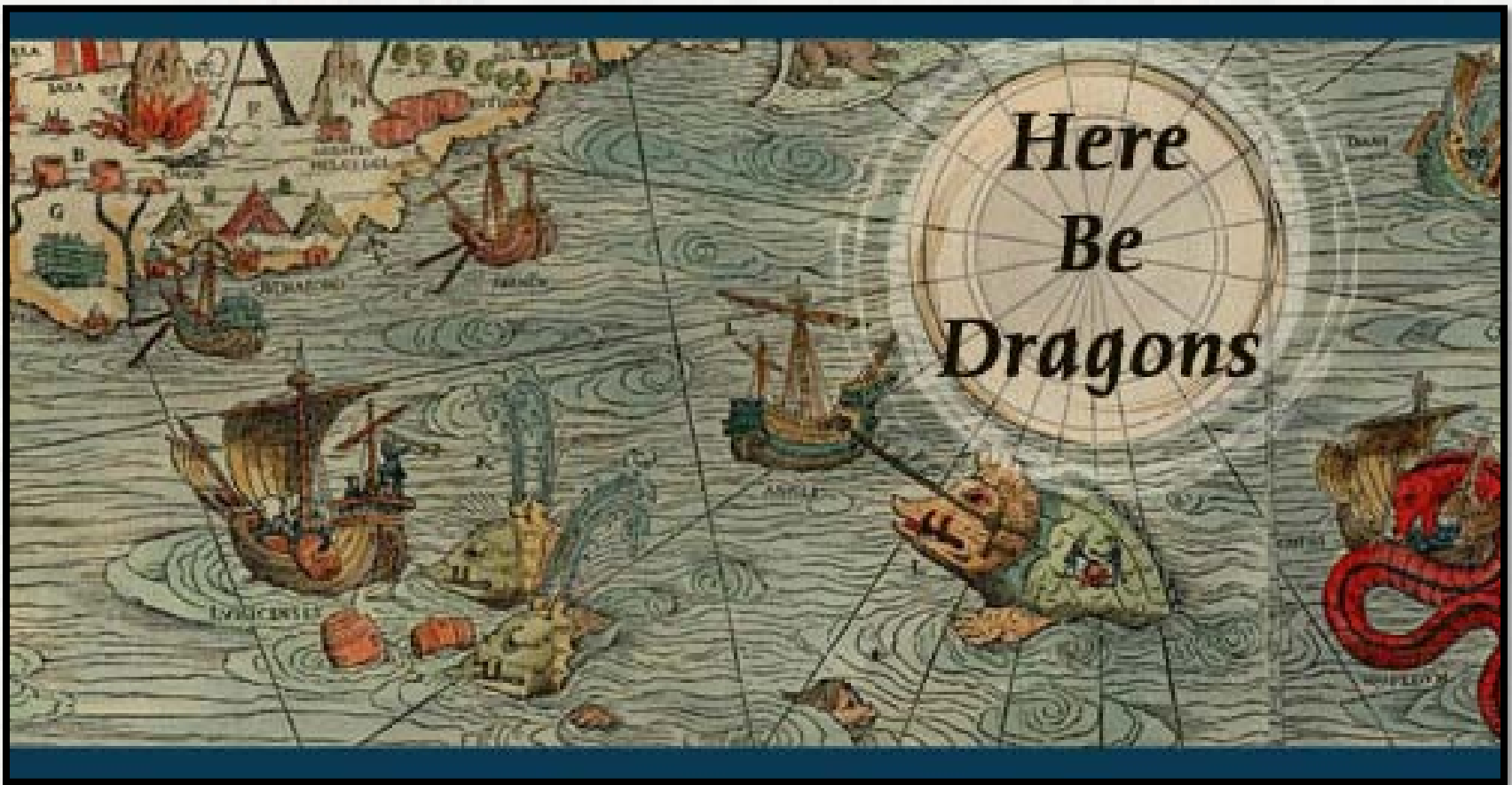
Provide WRS members with secure online access to their account, including the ability to securely update information online.

# Survey Results

- 2010 survey of WCOA and WREA found 70% of respondents would conduct on-line financial transactions with ETF if allowed.
- 80% indicated they would view information about their specific account online.
- By 2014, over 50% of adults will use some form of online bill pay service. Older adults, in particular, want tools that let them use current services more effectively or improve communication with their financial institution.

# Volume - Projected Population





**Mapping Our Business Processes**



## Mapping Our Business Processes

# “In Process” Process Improvements

## Allowing Members to Electronically Request Retirement Estimates.

- a. 15% of requests for estimates are emailed to us. We mail back a letter and paper form. Member fills out form and mails it back. We scan it and route it to staff to enter the data, prep the estimate, and mail it. . . .OR
- b. Member calls Call Center, agent takes info over the phone, enters request into system, and routes it for processing.
- c. NEW process will allow member to enter info themselves via the website and submit request electronically, rather than email a request or call the Call Center. Result will amount to a gain of about 1 FTE.

# “In Process” Process Improvements

## Automated Processing of Retirement Estimates.

- a. Currently, every retirement estimate is manually reviewed. About 30%, though, don't have complex factors like military service, multiple employment classifications, etc.
- b. With some work, the I.T. system could complete these simple estimates automatically and flag complex estimates for manual computation. Accuracy could be maintained via systematic audit.
- c. Result will be gain of about 0.5 FTE.





Firefox

etfnet.wi https://web.etfnet.wi/

ETF WF Status Search

## Imaging/Workflow System

Wed Oct 12 08:41:48 CDT 2011

### Work Flow Status Search

Social Security Number:

Find: call    Next Previous Highlight all Match case

status information

## Benefit Status

Wed Oct 12 08:33:57 CDT 2011

[Logout](#)

Payroll

Criteria

Find: call    Next Previous Highlight all Match case

Last Name:  First Name:  Last Name:  First Name:

DOB:  Gender:  DOB:  Gender:

### Member Summary

Member Name	SSN	DOB	DOD	Gender	Party ID	Partner Name	SSN	DOB	DOD	Gender	Party ID	Source	Term Date

Find: call    Next Previous Highlight all Match case





Apple is a very disciplined company,  
and we have great processes. But  
that's not what it's about. Process  
makes you more efficient.

-- Steve Jobs