STATE OF WISCONSIN
Department of Employee Trust Funds
Robert J. Conlin
SECRETARY

801 W Badger Road
PO Box 7931
Madison WI 53707-7931

1-877-533-5020 (toll free)
Fax (608) 267-4549
http://etf.wi.gov

CORRESPONDENCE MEMORANDUM

DATE: May 30, 2014

TO: Employee Trust Funds Board
Teachers Retirement Board
Wisconsin Retirement Board

FROM: Mark Lamkins, Director, Office of Communications

SUBJECT: Communications Update

This memo is for informational purposes only. No Board action is required.

Strategic Communications

The Office of Communications is participating in several internal strategic communication workgroups that are focused on assessing current and future external communication delivery channels; improving the customer experience; and identifying ways to increase member engagement and education. These cross-functional workgroups include frontline staff, managers and external stakeholders.

1. **Communication Delivery Channels**—The new Benefits Administration System (BAS) will change how we interact with and engage members, employers and third-party administrators (TPA). A workgroup is assessing current communication delivery channels and how to prepare for the effect of the BAS and online self-services in the future. This includes identifying the pros and cons of current web applications, person-to-person via phone, interactive voice response (IVR) telephony, print (e.g., letters, brochures, forms), FAX and e-mail. For example, a pro for IVR is that it is available 24 hours a day, seven days a week. A con is impersonal customer interaction. It's clear to us that an IVR offers enhanced functionality that would be worth exploring.

   Opportunities with alternative technologies, such as texting, online chat, mobile applications, social media and web-based portals, are being explored and how peer systems are using them. In addition, the workgroup is looking at best practices for security.

2. **Customer Experience**—With the BAS, members will be able to securely access their retirement, insurance and other benefits online any time. Employers and TPAs

Reviewed and approved by Robert J. Conlin, Secretary

Electronically Signed 6/11/14

Board	Mtg Date	Item #
JM	6.26.14	4C

will have more efficient reporting functionality. One-stop shopping and other process improvements will ultimately shape the customer experience and require the Department of Employee Trust Funds (ETF) to rethink its “brand” or identity.

A workgroup is addressing brand-related issues connected to the BAS and other agency communication initiatives. Focus areas include naming of the BAS online portal or portals, identifying key customer groups (e.g., members, employers, TPAs), and defining the different types of members (e.g., annuitant, beneficiary, participant).

3. **Member Engagement and Education**—The Health Benefits and Insurance Plans Bureau is leading a workgroup charged with developing a long-term strategic plan for providing education to members on important aspects of their health benefits so they can understand changes and new offerings, make the best decisions for themselves and their families, and use their benefits effectively. The workgroup’s first priority is putting in place a series of communications and online educational presentations for members and employers about the High Deductible Health Plan (HDHP) and Health Savings Account (HSA) option that will be effective January 1, 2015.

WRS Newsletter

The upcoming September issue of *WRS News* will be the last printed issue for both employees and retirees. In January 2015, the newsletter will be split—creating a customized version for employees and one for retirees. Employees will receive an interactive, web-based newsletter with infographics and links to online resources. Retirees will continue to receive the printed newsletter, but with content geared specifically for them. Communications about this change will go out to members and employers in September.

ETF has been co-publishing the newsletter, in its present format, with the State of Wisconsin Investment Board since January 2011. Right now, we are developing a prototype of the web-based newsletter, considering an increase in frequency from three to four issues per year and planning editorial content. In general, the web-based newsletter will be distributed to members via local and state employer agents who are *ETF E-mail Updates* subscribers. Individuals can also subscribe to the publication.

In addition to providing members with relevant and timely information, there is an estimated cost savings of more than $100,000 per year. We are also promoting online self-services and applying CEM best practices for customer service.

Other Updates

- **Quick Response (QR) Codes**—We have started testing the effectiveness of QR codes on some brochures. Members can use their mobile devices to scan the barcode and view online brochures or resources when it's convenient and without needing printed materials. Outreach staff have had success with barcodes placed on surveys provided to members who attend our "field presentations".

  Scan barcode with mobile device to go to ETF website.

- ***ETF E-mail Updates***—As of May 2014, more than 34,000 individuals have signed up for this free e-mail subscription service, powered by GovDelivery. ETF maintains current e-mail addresses for local and state employer agents—a primary distribution source. We use this efficient and cost-effective communications channel for interacting and engaging with members and employers. For example, information on annuity adjustments, contribution rates, new legislation and upcoming webinars is sent via this service. *ETF E-mail Updates* also offers functionality to support social media, which is important as we continue to explore communication strategies for Twitter, Facebook and LinkedIn.

  Here are some interesting e-mail subscription metrics for calendar year 2013:
  - Number of subscription topics: 39
  - Number of bulletins sent: 194
  - Percentage of bulletins delivered: 99.6%

  Look for the envelope to subscribe.

- **Communications Specialist Intern**—The Office of Communications has a communications specialist intern for the summer through the state's Summer Affirmative Action Internship Program. Emma Minkoff, a Madison native and sophomore at Goucher College in Maryland, is assisting with internal blog communications, form revisions and creating a photo library of people and service images to be used in external marketing efforts.

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