Customer Service Update

Joint Meeting Item 4B
September 20, 2018

Matt Stohr, Administrator

Division of Retirement Services

Changes to Report

- Most of the data previously included in the Retirement Statistics Report is now under ETF Board Agenda Item 5B-ETF Metrics Report.
- The data provided to the ETF Board is on the ETF website.
- Staff consolidated reports to reduce duplication and the number of reports to the Board.

Customer Service Highlights

Member Contacts to ETF

	2017	2018	Change
Q2			
Calls	45,277	43,800	-3.3%
Email	3,510	4,620	+31.6%
Total	48,787	48,420	-0.8%
YTD			
Calls	93,554	96,442	+3.0%
Email	7,634	8,995	+17.8%
Total	101,188	105,437	+4.2%

Member Feedback

- Member Charles H. wrote, “I want to say thank you…to the Specialist who responded so graciously to my telephone call.” He described how he called to obtain information about his annuity payment. The Specialist noticed he had moved to Minnesota, yet was still having Wisconsin income tax withheld from his annuity—and helped the member correct this.
- Lori, a personal banker assisting one of our members, said that the ETF Specialist was wonderful when assisting her client through a retirement application. She said, “He did a phenomenal job explaining all of the options available to the member.” She also appreciated that staff followed security protocols, such as verifying the identity of the member before releasing information.

Customer Service Improvements

- Sick Leave Credit Conversion Program Videos: http://etf.wi.gov/videos/acc_sick_leave.htm

- Process improvement: Shortened the time it took to set up an WRS agent for an employer. The turnaround time was slimmed down from 7.75 business days to 2.20 business days. Staff removed steps from the IT access process.


Questions?

Thank you

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