



# Customer Service Update

Joint Meeting Item 4A  
December 13, 2018

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Division of Retirement Services



A photograph of a call center agent, a young man with a beard, smiling while talking on a mobile phone. He is sitting at a desk with a laptop. In the background, another agent is visible, also on a phone. The image has a blue overlay.

# Work Volume and Production – Call Center

# Member Contacts to ETF

	2017	2018	Change
<b>Q3</b>			
<b>Calls</b>	37,143	39,335	+5.9%
<b>Email</b>	2,365	3,116	+31.8%
<b>Total</b>	39,508	42,451	+7.5%
<b>YTD</b>			
<b>Calls</b>	132,488	135,777	+2.5%
<b>Email</b>	9,999	12,111	+21.1%
<b>Total</b>	142,487	147,888	+3.8%

# Member Contacts to ETF

It's Your Choice	2017	2018	Change
<b>All four weeks</b>			
<b>Call Volume</b>	23,799	24,170	+ 1.6%
<b>Average Wait</b>	4:26	6:39	+ 50.0%
<b>Highest Volume Week</b>			
<b>Call Volume</b>	6,227	8,431	+ 35.4%
<b>Average Wait</b>	4:40	6:42	+ 43.6%

A man with a beard, wearing a light blue long-sleeved shirt, is seated in a wheelchair. He is smiling and holding a black mobile phone to his ear. The background shows a call center environment with other employees at their desks, one of whom is also on a phone. The scene is dimly lit with a blue tint.

# Customer Feedback

# Member Feedback

- David C. called with questions after his wife died. He spoke with a trust funds specialist, hung up, thought of another question, and spoke with a second trust funds specialist. Even during this difficult time, he called the supervisor to say that he was amazed by how knowledgeable and professional both specialists were.
- Suzanne R. called soon after she retired. She had many questions, especially about insurance. About the trust funds specialist she spoke with she said, “This man is a star!” She said he was well-informed and answered all of her questions. She said, “You are fortunate to have him working at ETF.”



# Member Feedback

## *From Member Surveys:*

- “(The trust funds specialist) was easy to talk to, answered all my questions thoroughly, picked up on when I didn’t fully understand and in that case, went over the issue again.”
- “He was cordial, informative, and genuinely helpful. I feel lucky to have met him and receive his support!”
- “She did a fantastic job. This was a great and helpful experience that eased many concerns and addressed my confusion.”
- “She is an excellent, informative, and professional representative for ETF.”



# Trends - Retirement





# Retirement Trends

The number of retirement estimate requests and retirement applications have both increased slightly.

Q3	2017	2018	Change
Retirement Estimates Requested	5,384	5,430	0.9%
Retirement Applications Received	2,665	2,720	2.1%
YTD	2017	2018	Change
Retirement Estimates Requested	19,337	19,860	2.7%
Retirement Applications Received	10,191	10,800	6.0%



# DRS Projects and Accomplishments

# Customer Service Improvements

- Completed 260 benefit corrections caused by reporting errors by two employers.
- The normal average for benefit corrections is 20 per month. With the exception of one account all of these 260 corrections were completed by November 16, 2018—in approximately two months.

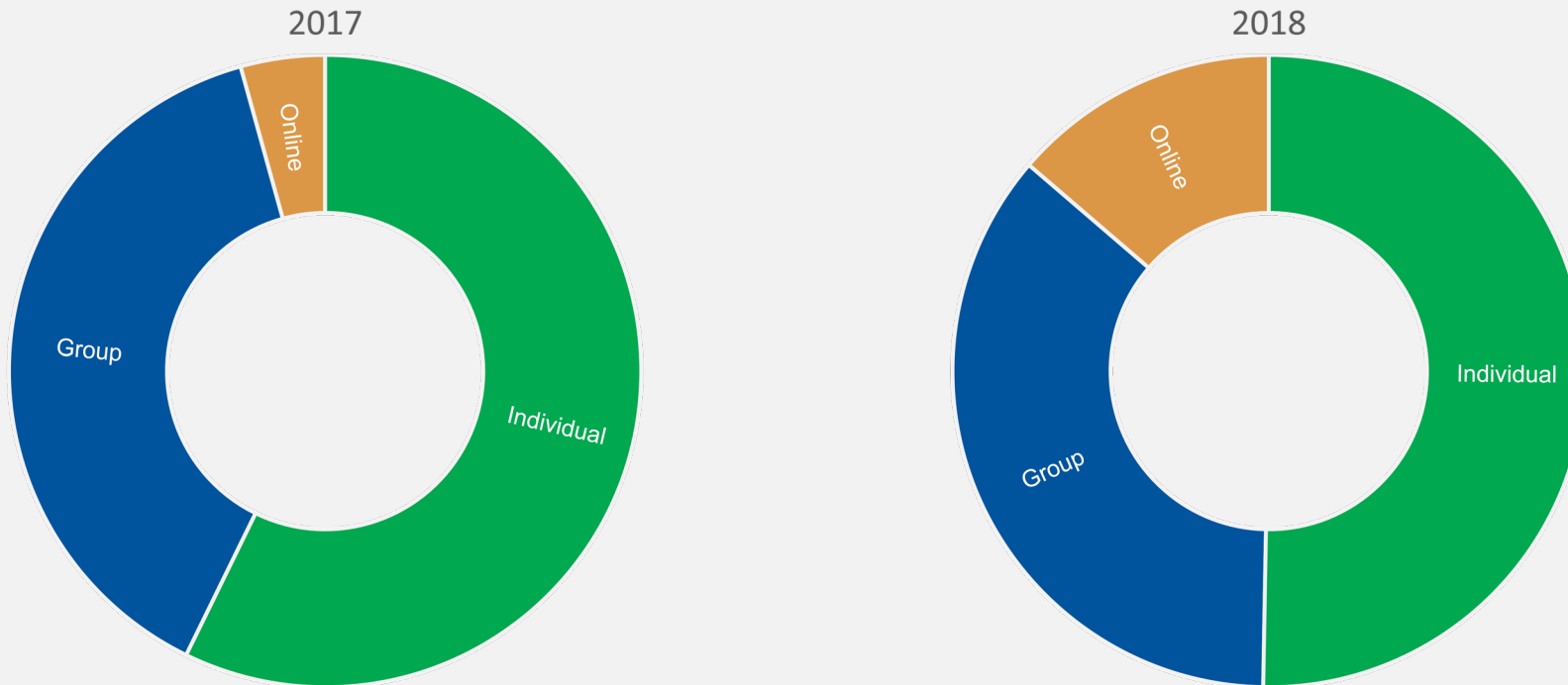
# Customer Service Improvements

A collaborative effort between the Call Center and Supply and Mail Services (SAMS) improved the process for confirming receipt of member faxes.

- Call Center staff have direct access to fax information.
- Members receive real-time information about their fax.
- The number of calls between staff in these units was reduced by 82% in the first month.

# Customer Service Improvements

ETF is serving an increasing number of members through online appointments, providing a convenient yet effective way to obtain retirement information.





**Questions?**



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# Thank you

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