Customer Service Update

Joint Meeting Item 4A
September 19, 2019
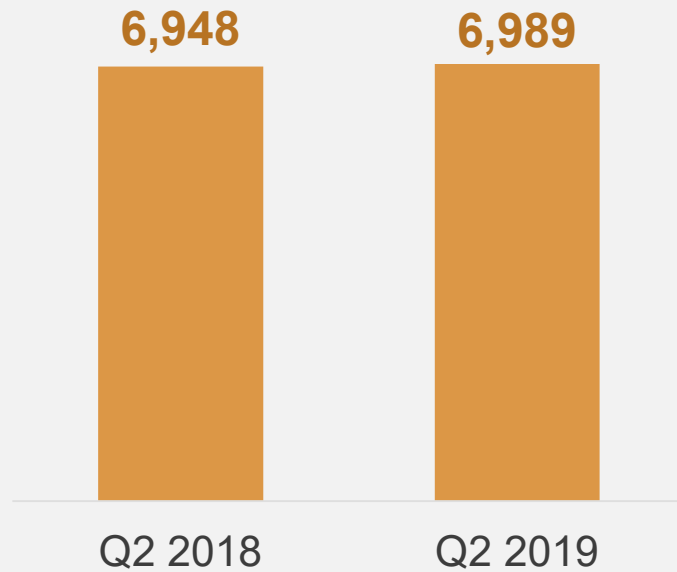
Anne Boudreau, Deputy Administrator

Division of Retirement Services
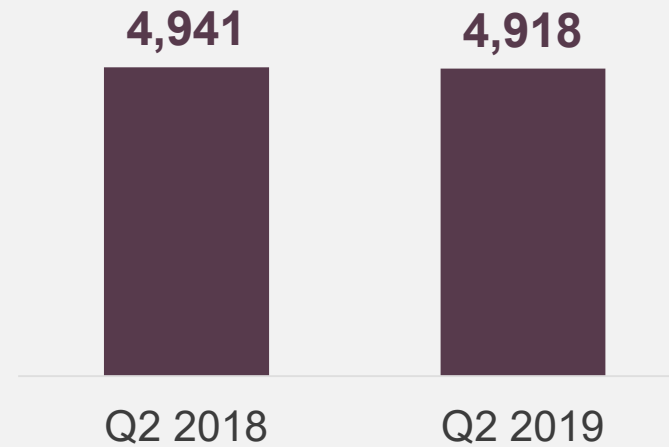
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Work Volume and Production

Retirement Trends

6,948 **6,989**
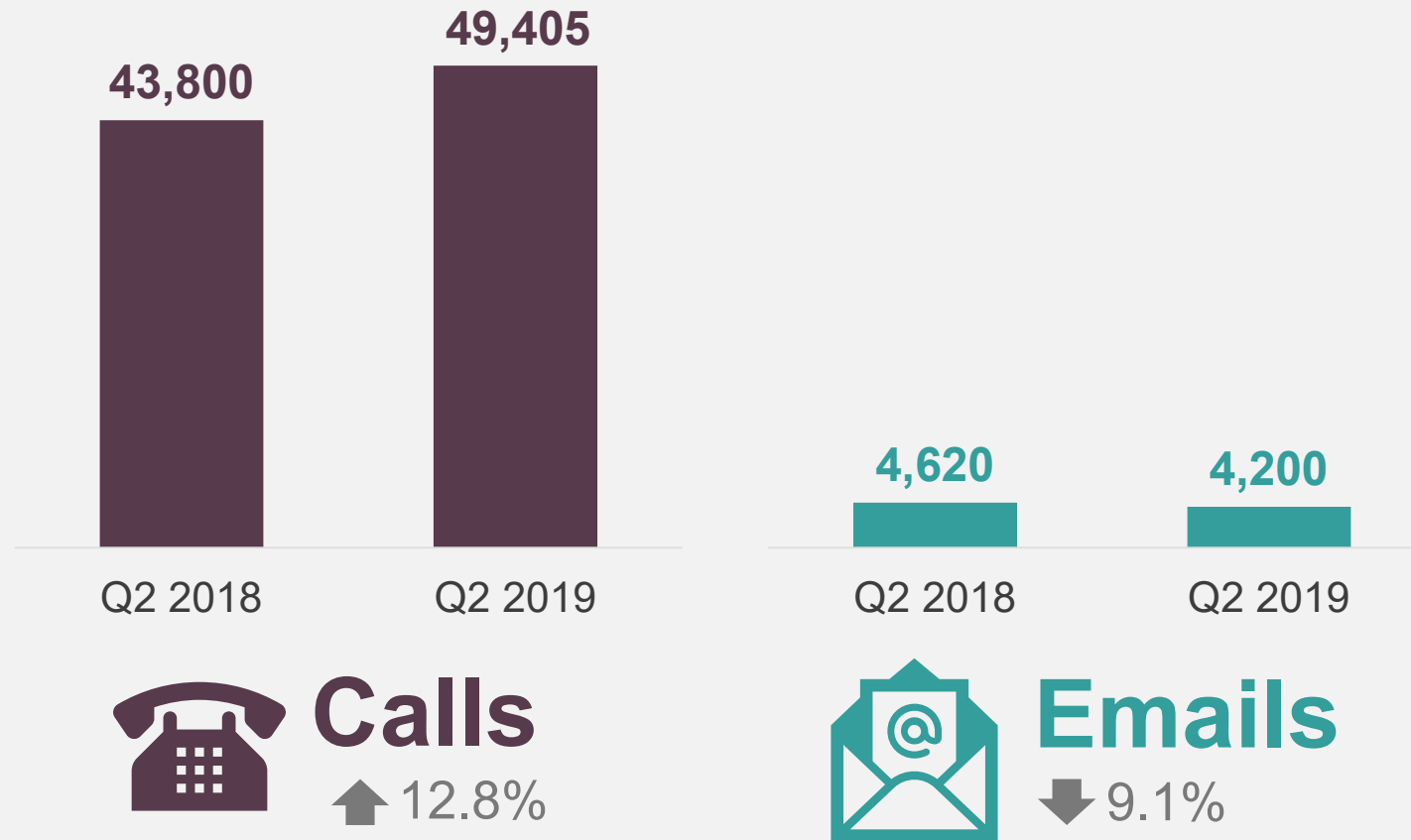
4,941 **4,918**

Q2 2018   Q2 2019

Q2 2018   Q2 2019

Retirement Estimates

▲ 0.6%

Retirement Applications

▼ 0.5%

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Member Contacts to ETF

49,405

43,800

4,620   4,200

Q2 2018   Q2 2019   Q2 2018   Q2 2019

Calls
▲ 12.8%

Emails
▼ 9.1%

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Member Attendance at Webinars

3,058

1,350

Q2 2018   Q2 2019

Webinars

▲ 127%

More webinars

Increased bandwidth

Better marketing

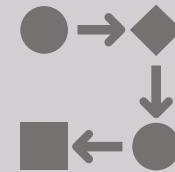More demand

DRS Projects and Accomplishments

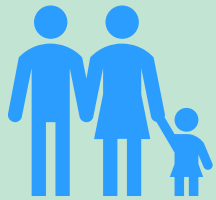# Process Improvement: Call Routing System

Reason for system replacement

Choice of Centurion CARES

Timeline

Process Improvement: Call Routing System

Benefits for Members

- Save time with pre-authentication

- Hear estimated wait time or position in queue

- Opt for a callback rather than wait on hold

- Give input via surveys that are relevant and responsive to needs

- Experience better sound quality

Process Improvement: Retirement Estimates

Simplify benefit effective date for inactive employees

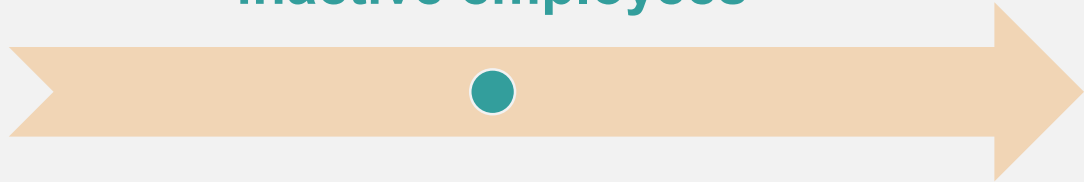Eliminate forms that cause extra work and do not add value

Reduce the size of the retirement packet and share resources

Streamline the retirement estimate printing process

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Process Improvement: Retirement Estimates

Simplify benefit effective date for inactive employees
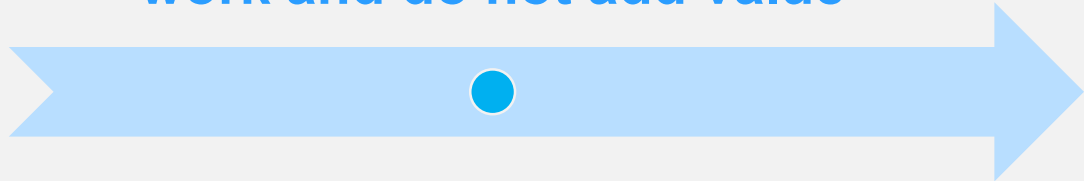
Gains:

Fewer errors

More effective prioritization of retirement estimate requests

Simplified and more effective monitoring for members at risk of losing benefits

Process Improvement: Retirement Estimates

Eliminate forms that cause extra work and do not add value

Gains:

Lower paper and printing costs

Less staff time *per year* –
- 20,000 fewer documents to image
- 20,000 fewer "staple groups" to create in member files
- 25,000 fewer instruction sheets to complete, staple, and transport
- 45,000 fewer staples to remove!

Process Improvement: Retirement Estimates

Process Improvement: Retirement Estimates

Reduce the size of the retirement packet and share resources
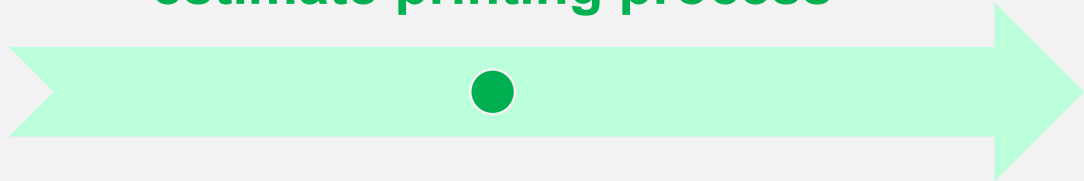
Gains:

Lower paper, printing, and mailing costs

Less staff time to prepare standard and customized retirement packets

Member focus directed to the most important documents

Process Improvement: Retirement Estimates

Streamline the retirement estimate printing process

Gains:

Fewer handoffs

Fewer printer problems and thus less staff time to resolve those

Less risk of error or privacy incident due to mismatch

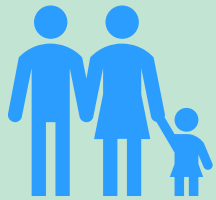# Process Improvement: Retirement Estimates

Cost Savings

Estimated cost savings:

$13.30 per retirement estimate

OR

$333,537 per year!

Process Improvement: Retirement Estimates

Benefits for Members

- Receive retirement estimate more quickly

- Insure prioritization to avoid potential loss of benefits

- Focus attention on the most important documents

- Protect against error or privacy incident

Questions?

Thank you

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1-877-533-5020