

# Member Engagement Survey Results

Joint Meeting - Item 4B  
September 17, 2020

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Office of Communications



# Agenda

Purpose and  
Background

Customer  
Experience

Engagement

Key Findings

Recommendations

Next Steps

# Purpose and Background

# 2019 Member Engagement Survey



**137,253**  
Surveys  
Sent

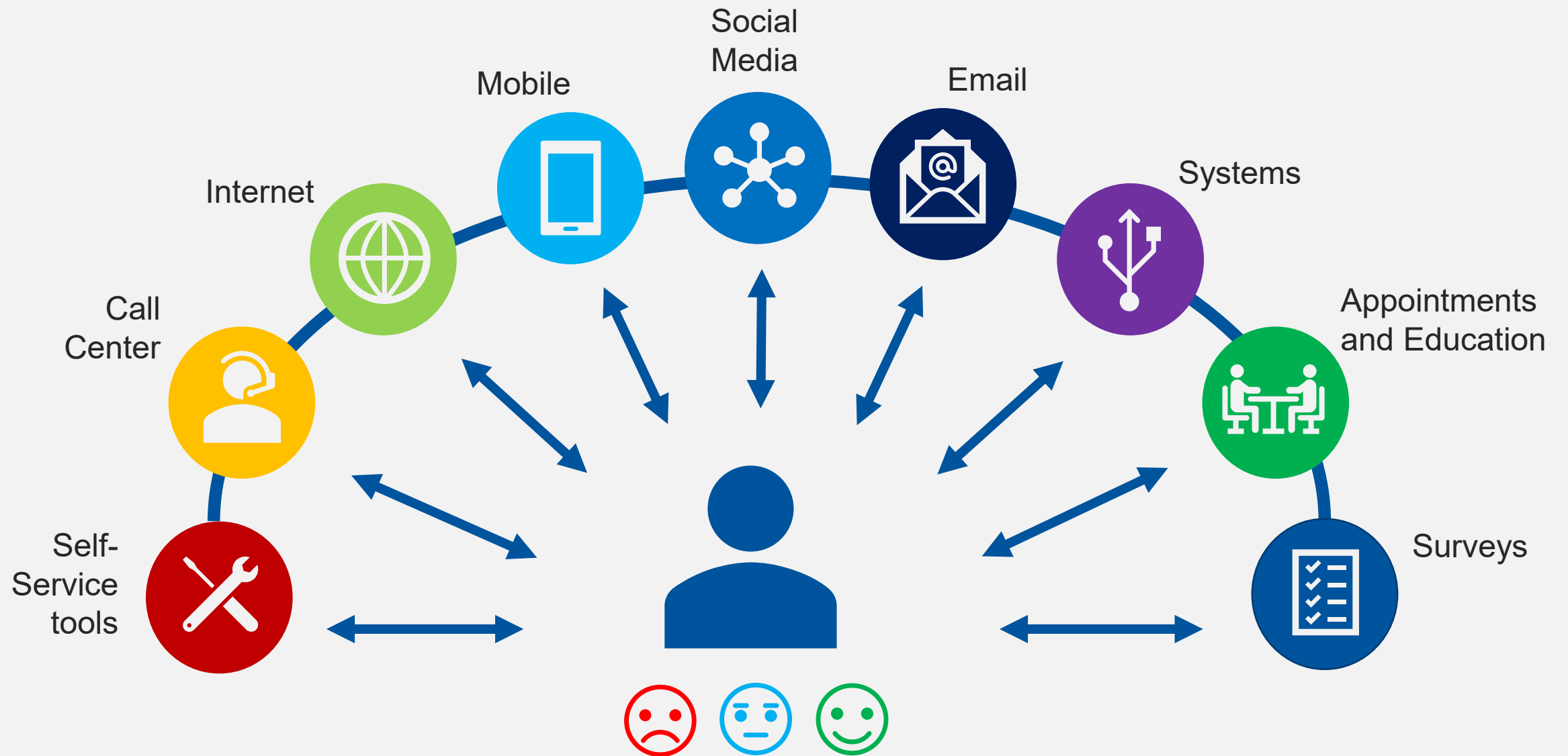


**19%**  
Response  
Rate



**37 Questions**  
Anonymous  
Confidential

# Customer Experience



# Engagement

# Why focus on engagement?



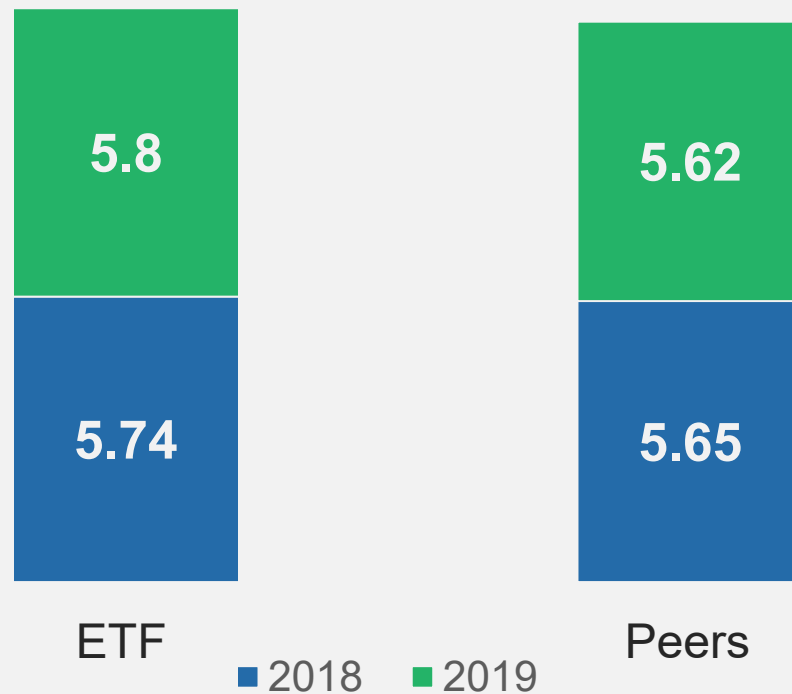


# CEM Core Questions

- **Q1:** How satisfied are you with ETF?
- **Q2:** I know ETF operates in my best interest.
- **Q3:** I feel confident my retirement is secure with ETF.
- **Q4:** ETF sends communications that are relevant to my needs.
- **Q5:** ETF acts ethically.

# Engagement Score

Average Engagement Score



Compared to peers:

- CalSTRS
- Illinois MFR
- Indiana PRS
- Michigan ORS
- Ohio PERS
- Oregon PERS
- Pennsylvania PSERS

# Key Findings

# Who completed the survey?



## Member Type

- 30% Active employee
- 67% Retiree
- 3% Other



## Gender

- 55% Female
- 45% Male



## Age

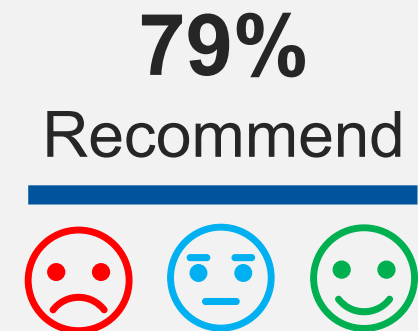
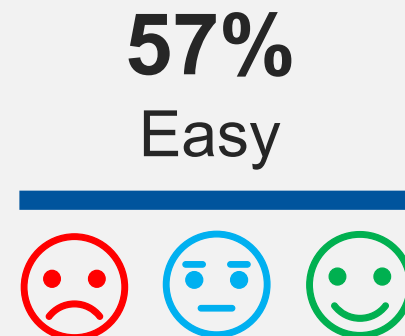
- 5% 20-39
- 26% 40-59
- 70% 60+



## WDC

- 24% of respondents participate in the WDC Program

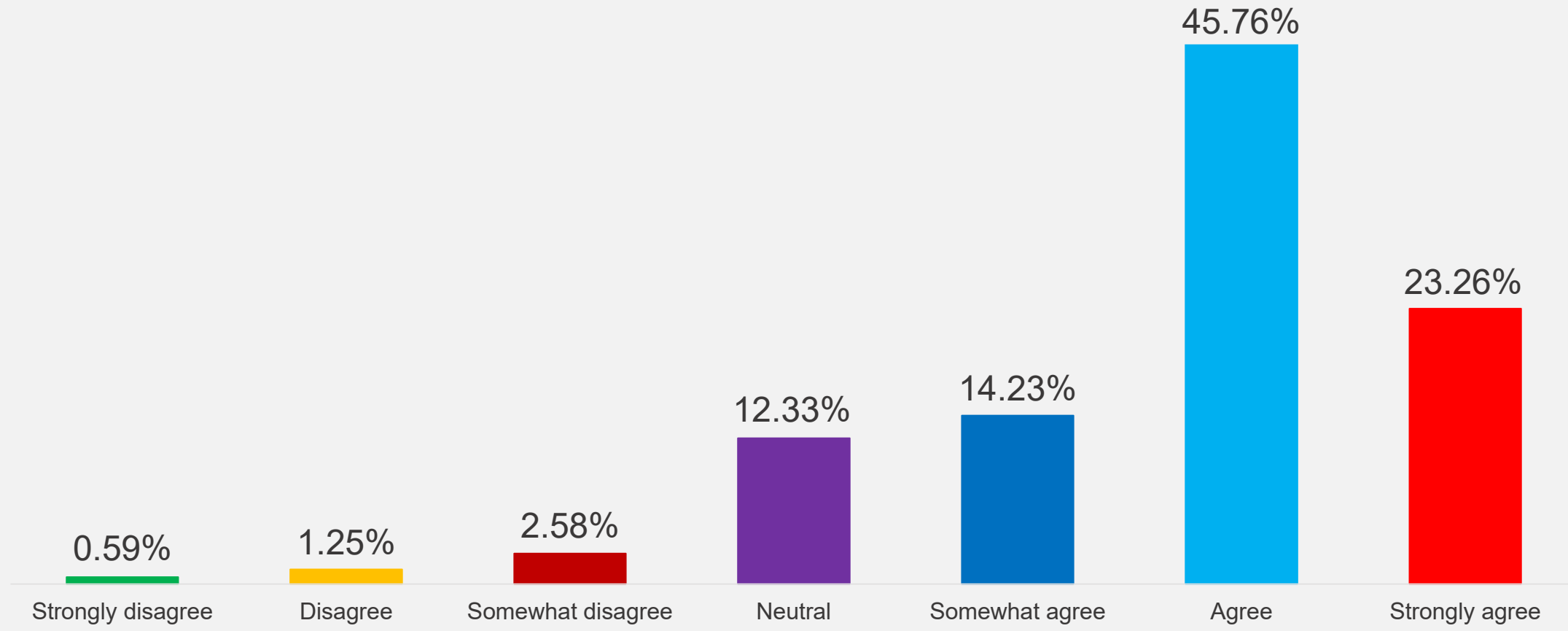
# Customer Experience



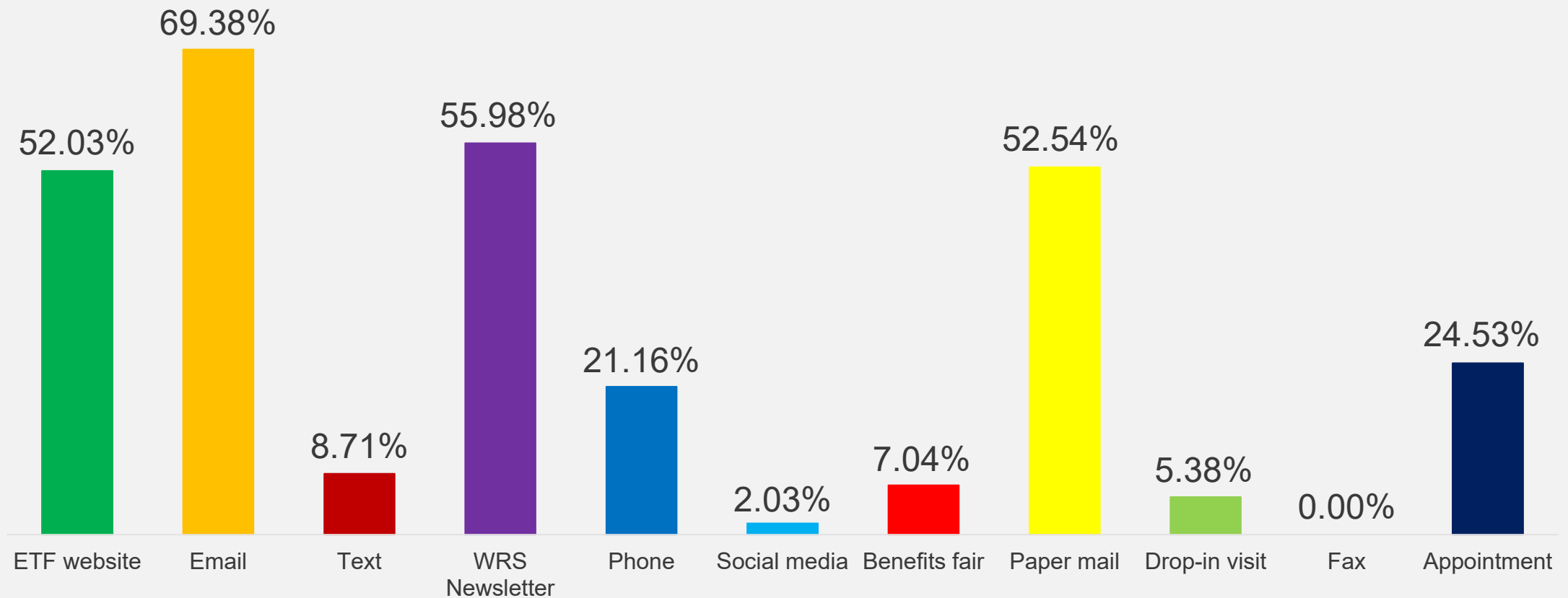
**NPS = 49**

Net Promoter Score is Overall Satisfaction + Loyalty

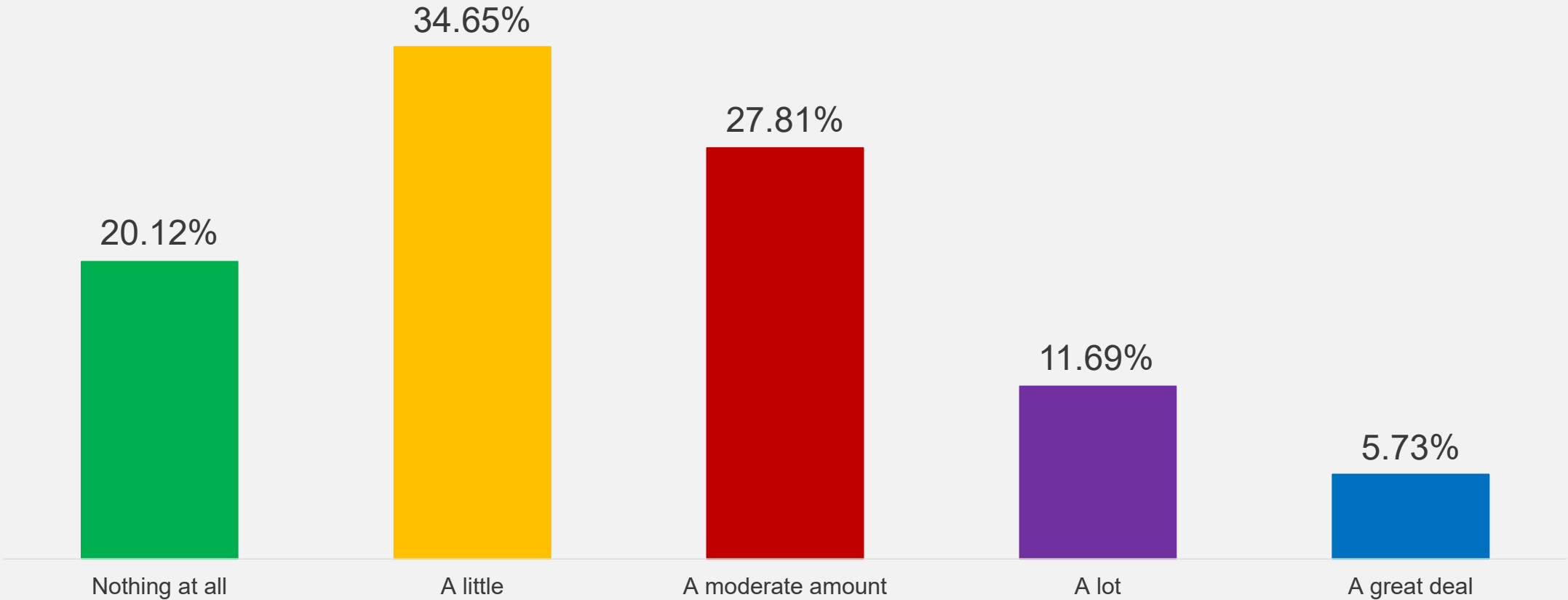
# Are ETF communications relevant to your needs?



# Preferred Channels

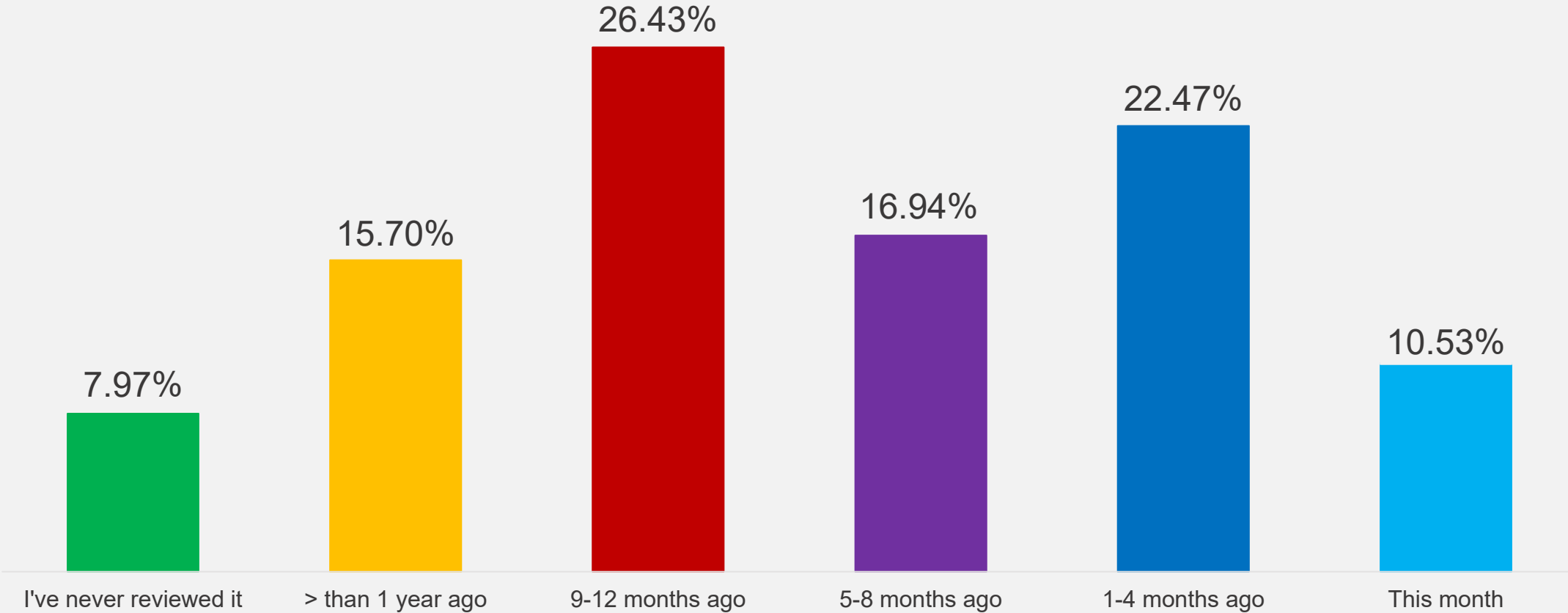


# Have you learned about retirement options from your employer?

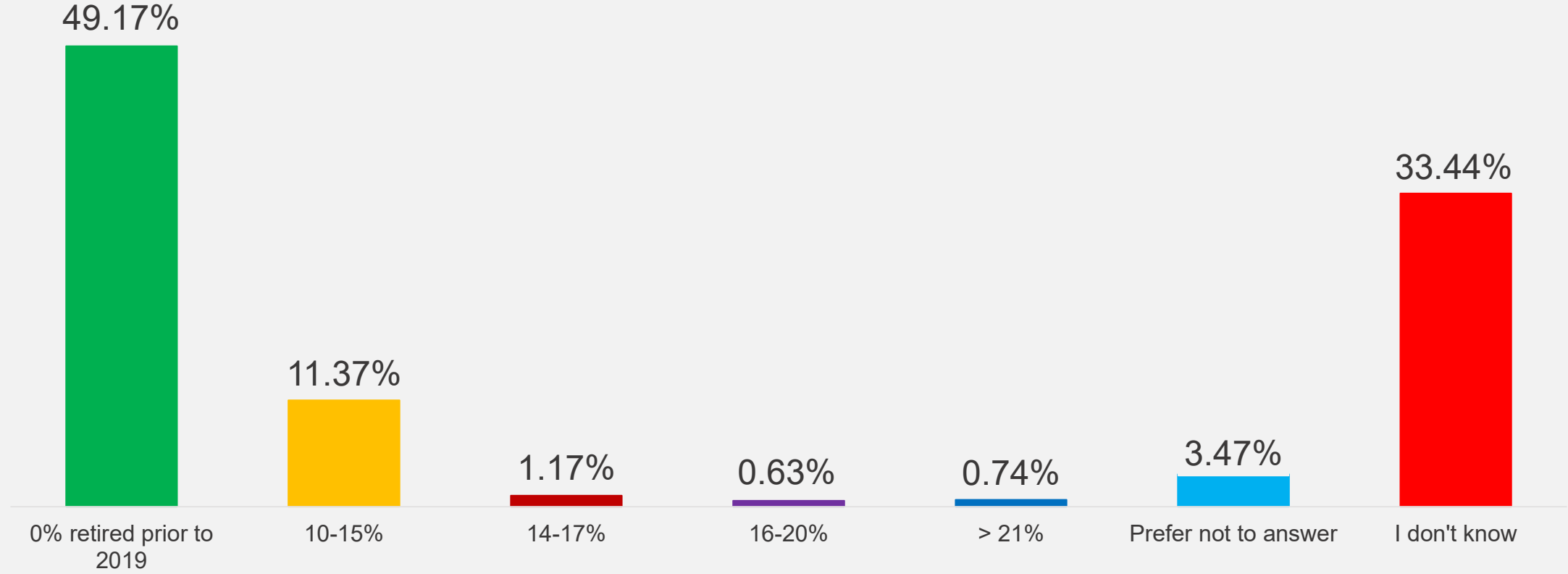




# When was the last time you reviewed your WRS statement?

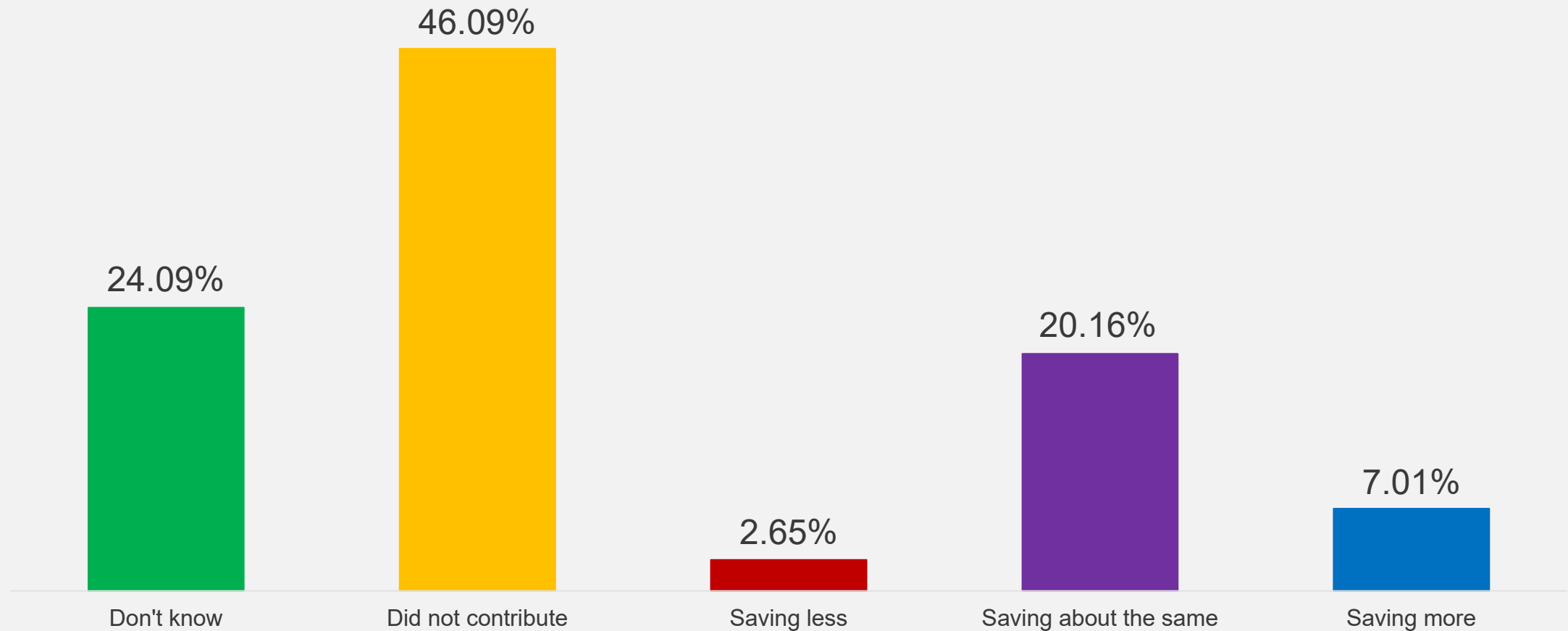


# What % of your 2019 WRS earnings will be added to your WRS account?

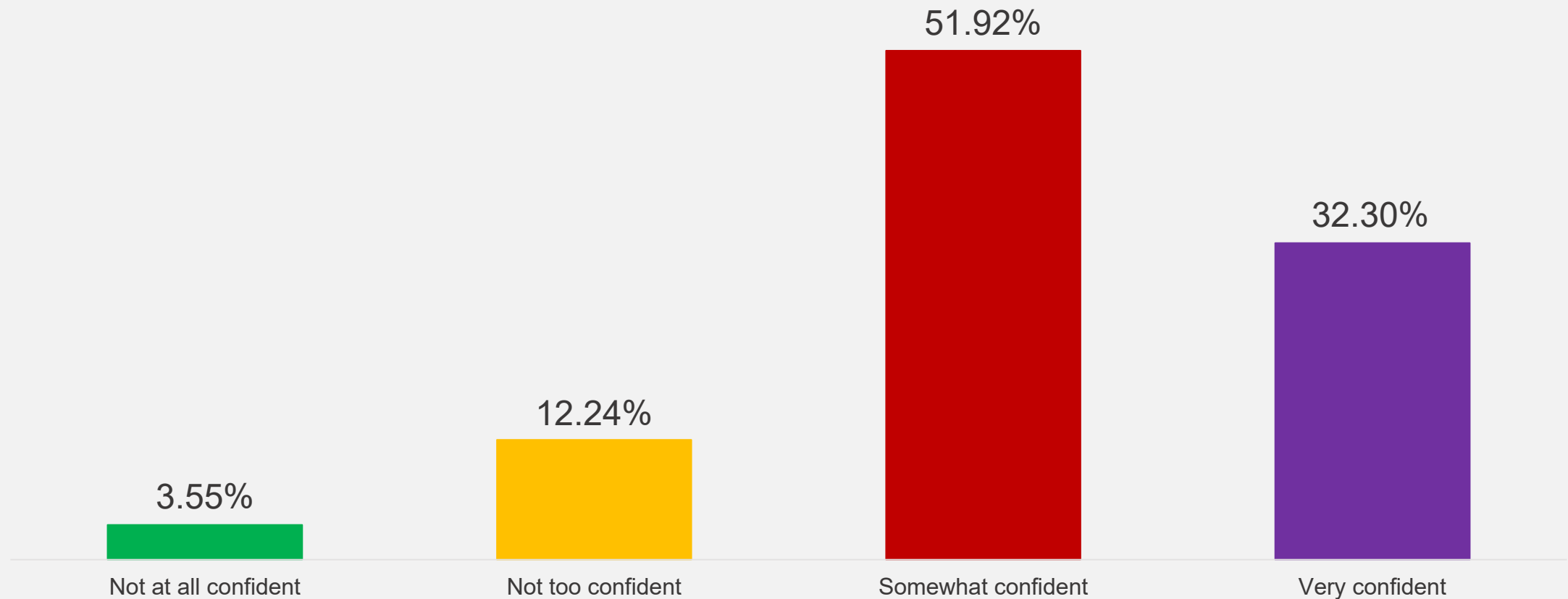


# Retirement Account Contributions

## 2019 vs. 2018 (All Accounts)



# Retirement Confidence Level



# Other Observations

- Awareness of ETF-administered benefits, programs, and services is not uniform across all demographics
- Members want more frequent updates on their WRS accounts
- Members want more information about their benefits and education on retirement planning
- Members are dissatisfied with having to navigate multiple channels or systems to manage their benefits
- Members report challenges accessing benefits information from their employers
- While members agree ETF provides timely responses and resolves issues, there is an opportunity to improve Call Center interactions

# Recommendations

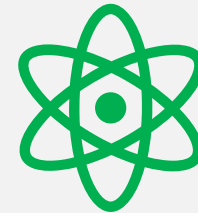
# Things to Explore



Targeted communications and education



Increase email addresses



Connect members to resources



Partner with employers



Examine member effort levels



Standardize customer experience metrics

# Next Steps



# Next Steps

- Share findings and recommendations
- Align recommendations with existing initiatives
- Drill-down to data to better understand customer pain points
- Work with business areas to implement solutions that make sense and have the biggest impact
- Prepare for the 2020 Member Engagement Survey

The background is a dark blue gradient with numerous out-of-focus light spots in shades of blue and purple, creating a bokeh effect.

**Questions?**

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# Thank you

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