



# Customer Service Update

Joint Meeting Item 4A  
December 9, 2021

Anne Boudreau, Deputy Administrator  
Division of Retirement Services

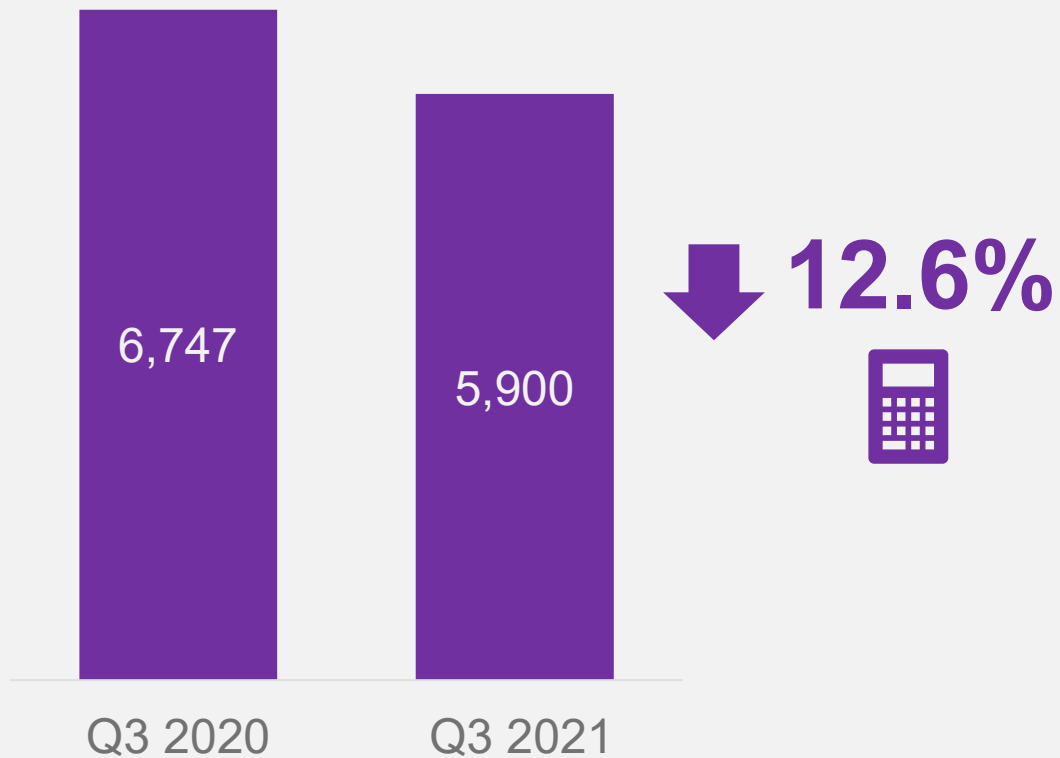




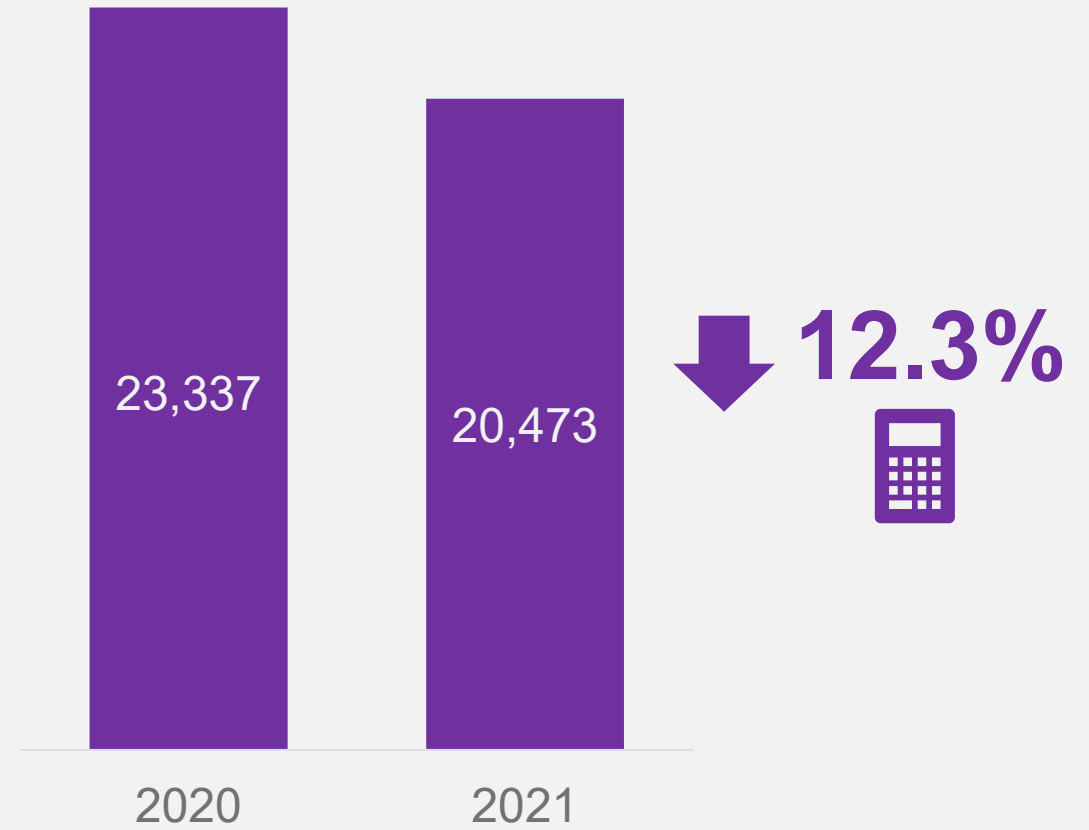
# ETF Work Volume and Retirement Trends

# Retirement Estimates

## Quarter 3

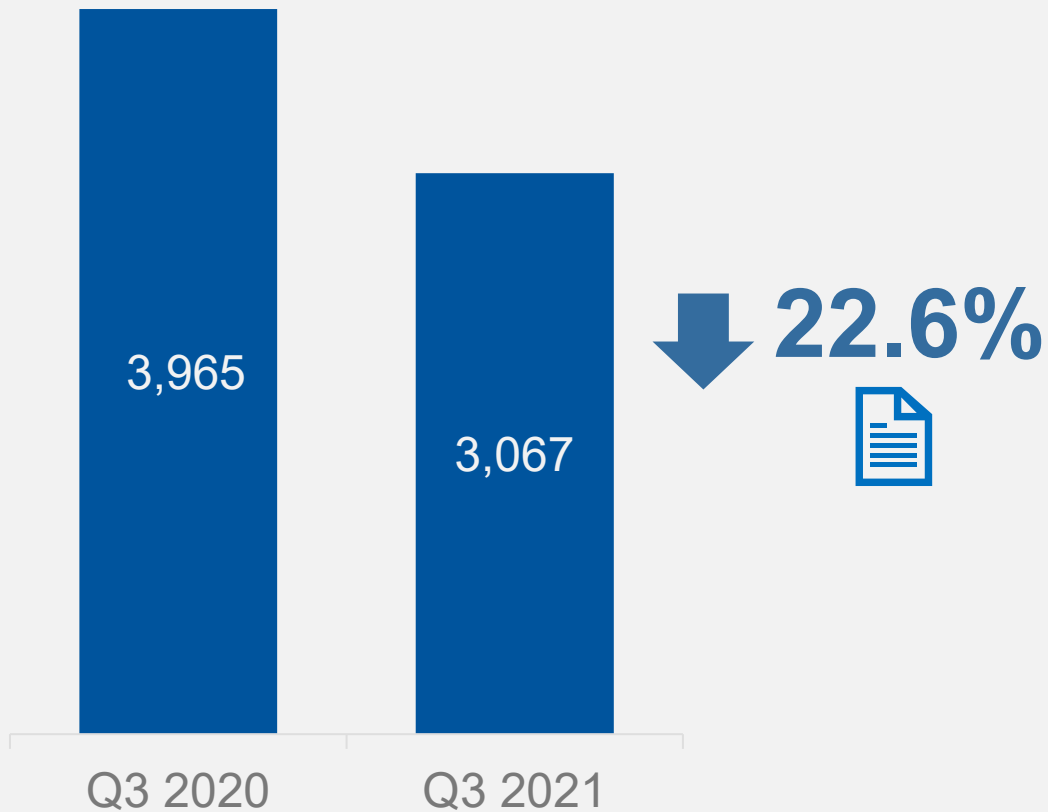


## Year-to-Date

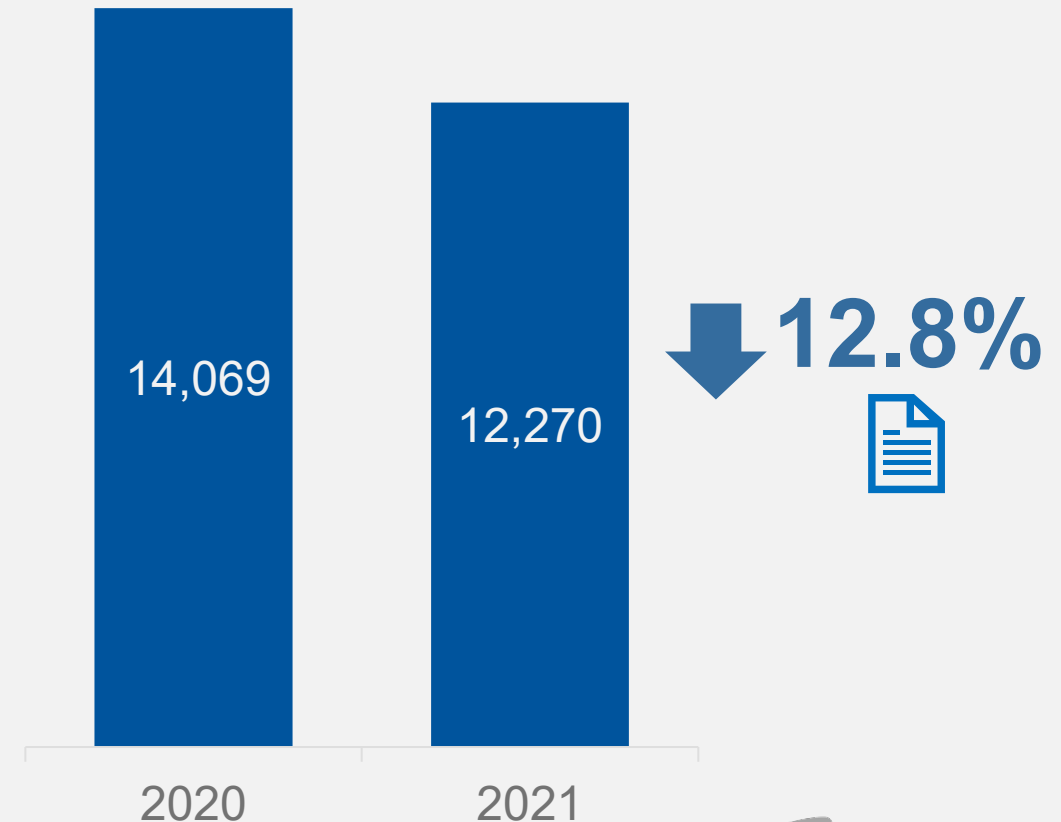


# Retirement Applications

## Quarter 3

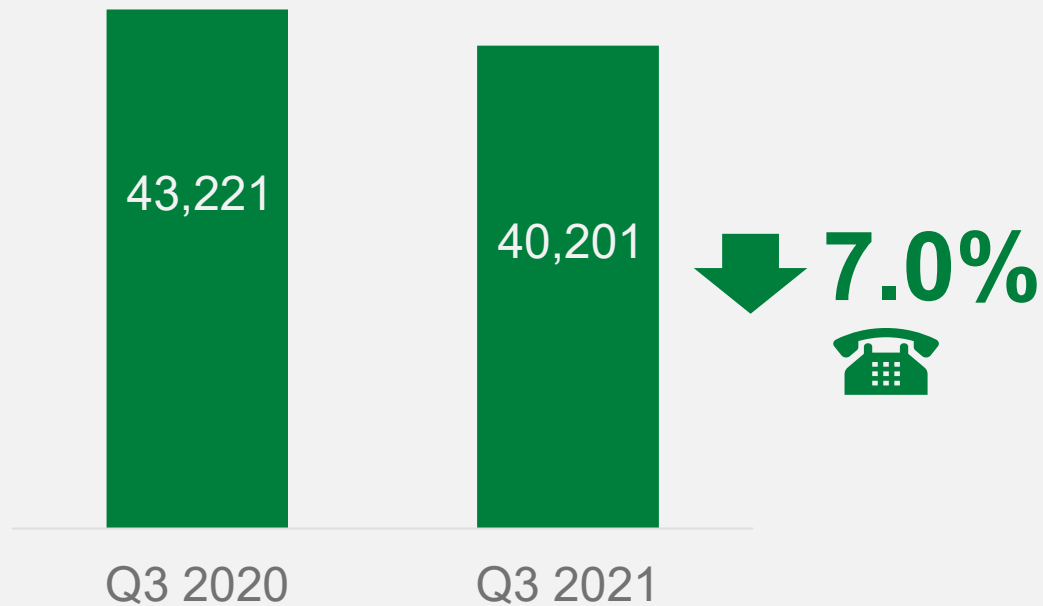


## Year-to-Date

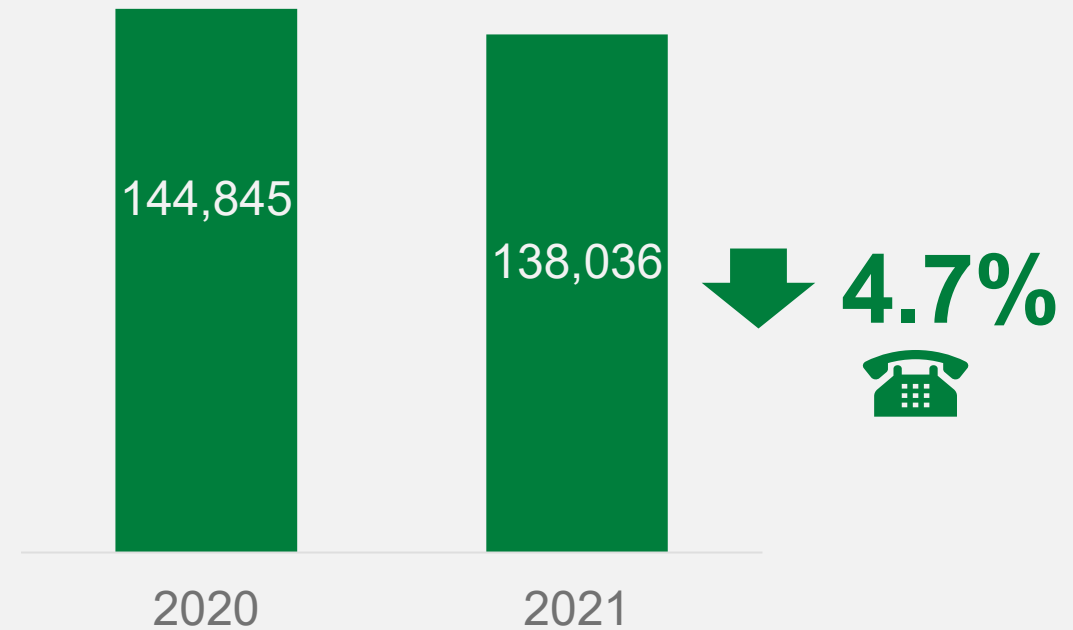


# Member Contacts - Calls

## Quarter 3

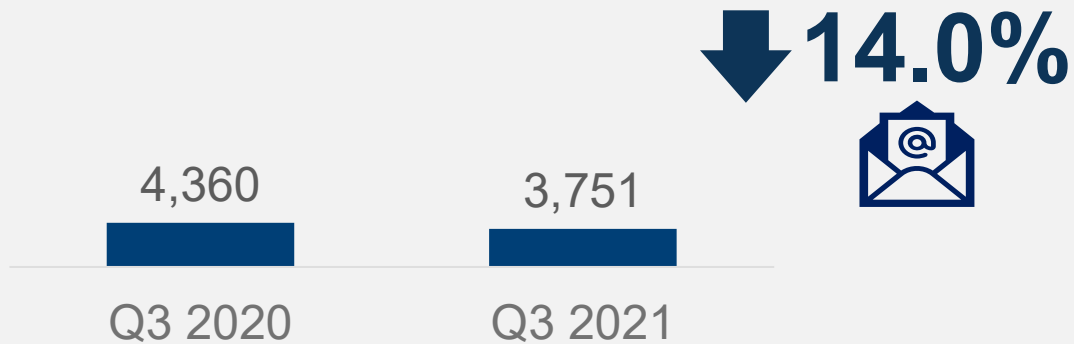


## Year-to-Date



# Member Contacts - Email

## Quarter 3



## Year-to-Date







# ETF *It's Your Choice* 2022

# IYC – Member Call Volume

<i>It's Your Choice Call Volume</i>			
	Calls Answered	Avg Wait Time	Avg Talk Time
2020	15,352	2:32	6:21
2021	16,563	1:47	6:35
Difference	↑7.89%	↓0:45	↑0:14



# IYC – Webinar Attendance

Webinar Type	2021	2022	Difference
Health Benefits Webinars	1,796	1,144	-36.3%
Vendor Q&A Webinars – For Employers Only (discontinued)	497	n/a	n/a
Vendor Q&A Webinars	1,383	919	-33.6%
<b>Total</b>	<b>3,676</b>	<b>2,063</b>	<b>-43.9%</b>

- Overall webinar attendance was lower for the 2022 open enrollment period due to a variety of factors – eliminating a webinar session type, minimal benefit changes, and additional vendor outreach
- Attendee feedback largely positive, with technical issues the most commonly mentioned area for improvement

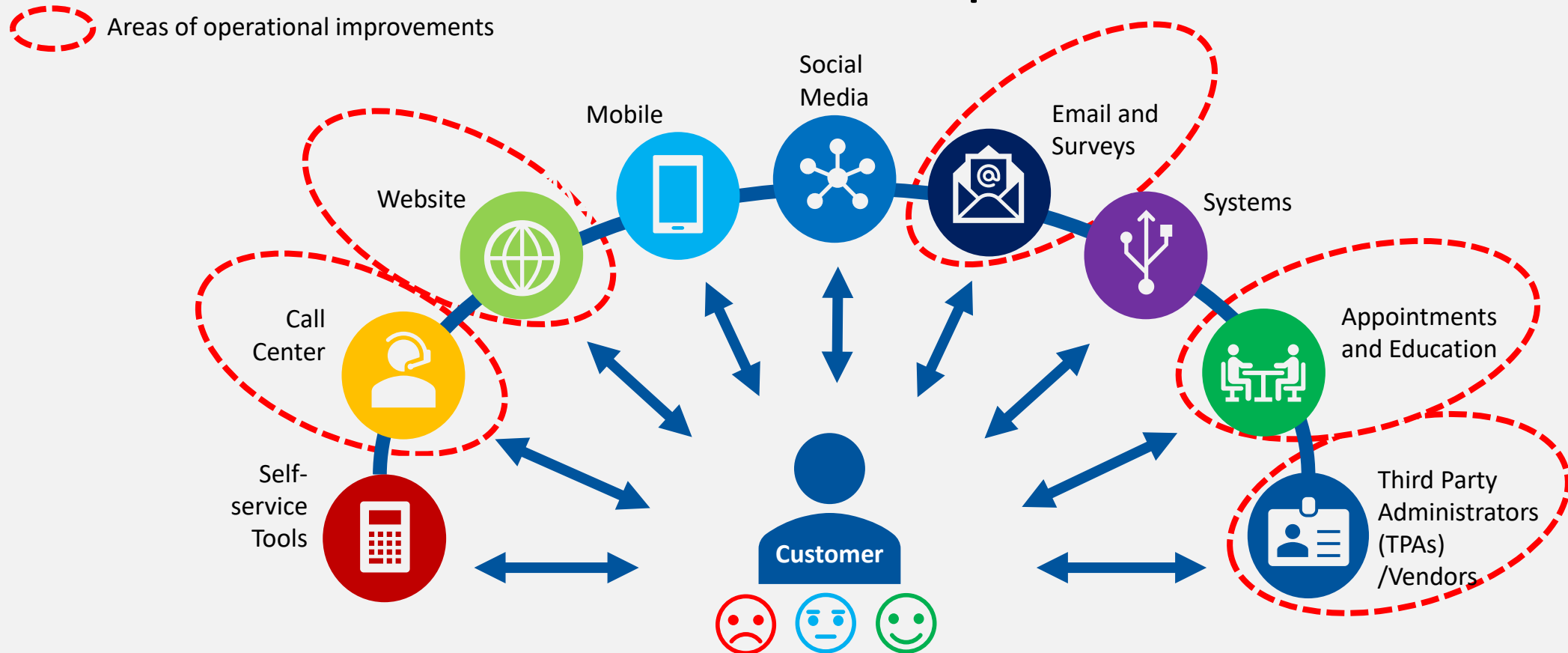
(Ref. GIB | 11.17.21 | Item 6, page 3)



# ETF Operational Improvements

As we strategically build for the future, we make **incremental operational improvements** to better serve our customers

## ETF Customer Touchpoints



# Online and Self-Serve Options:

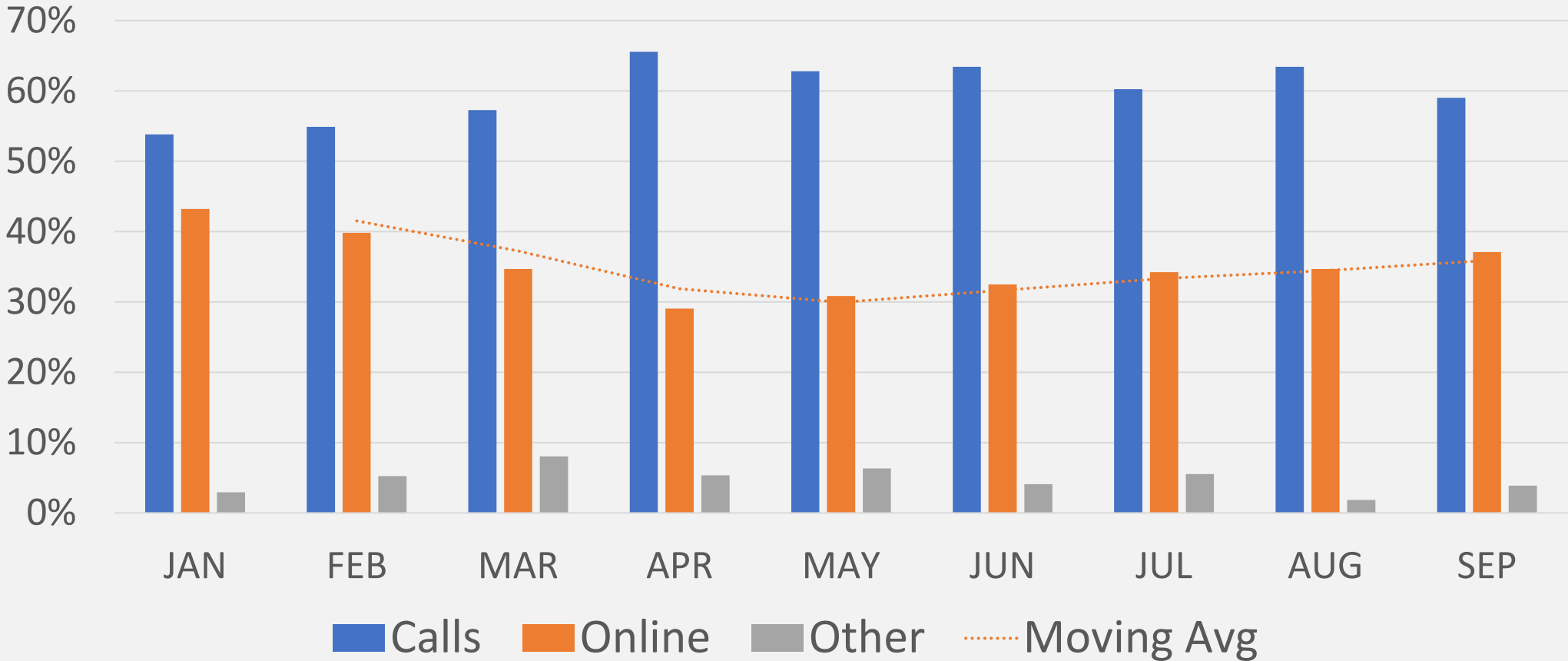


Online Estimate  
Request

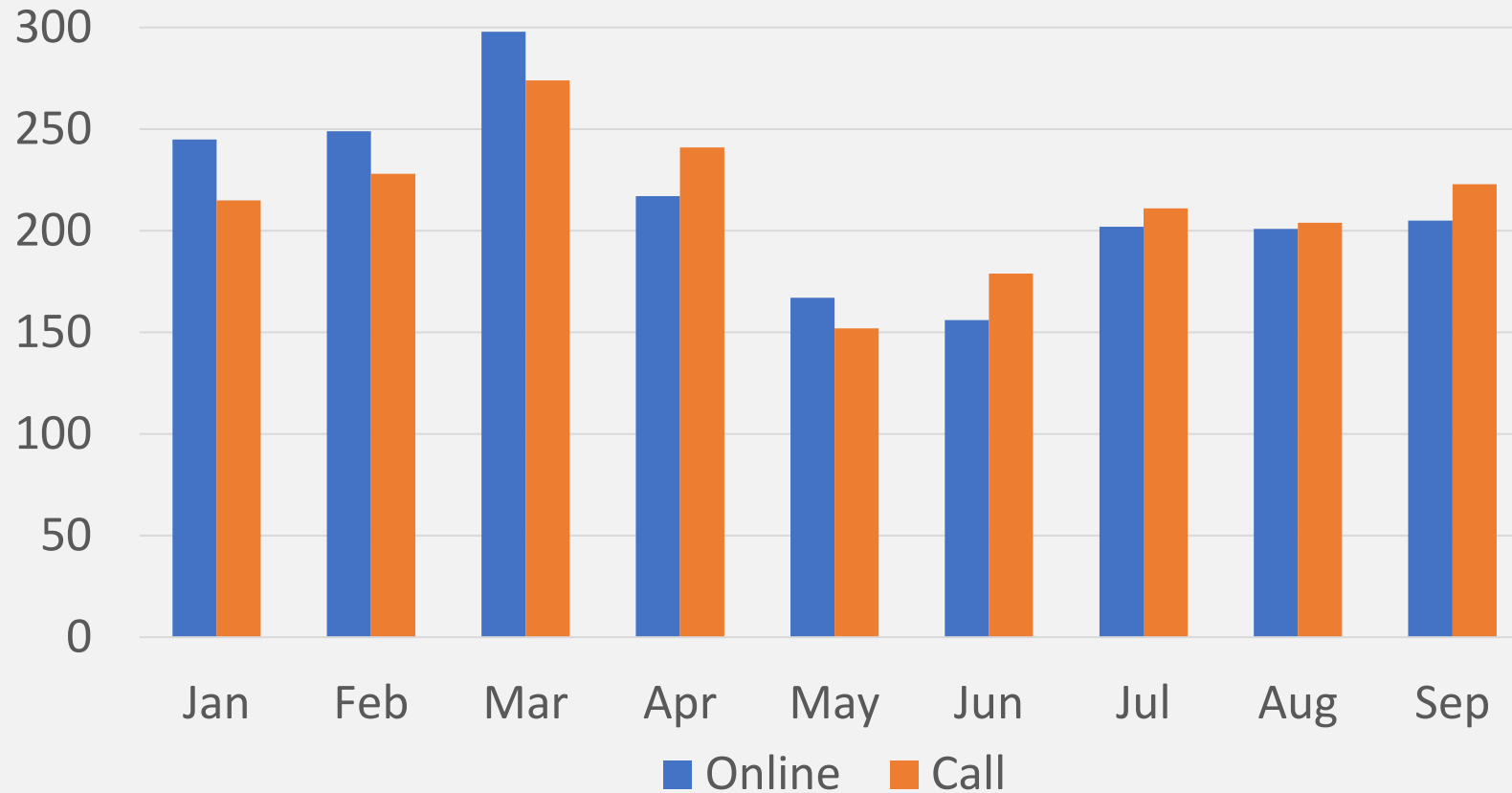


Online Appointment  
Scheduler

The number of members **requesting retirement estimates** online has increased from 20% at the start of 2020 to 35% so far in 2021



During 2021, a majority of members **scheduling an appointment online**  
51% of members used ETF's online scheduler tool





# Process Improvement: Secure Email to Members



Secure Email to  
Members



**Questions?**

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# Thank you

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ETF E-mail Updates



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