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**Correspondence Memorandum**

**Date:** August 25, 2023

**To:** Employee Trust Funds Board  
 Teachers Retirement Board  
 Wisconsin Retirement Board

**From:** Anne Boudreau, Deputy Administrator  
 Division of Retirement Services

**Subject:** Customer Service Improvements and Trends

**This memo is for informational purposes only. No Board action is required.**

This document provides information about current activities in the Division of Retirement Services, including workload demand, customer use of self-service options, and process improvement projects.

**Workload Demand**

Retirement Estimates, Applications, Annuities Started, Lump Sums  
 Comparing the second quarter of 2023 to that same quarter in 2022, the number of retirement estimate requests increased, while applications, new annuities, and retirement lump-sum benefits all decreased.

	<b>Q2 2022</b>	<b>Q2 2023</b>	<b>Change (%)</b>
Retirement Estimates Requested	6,133	6,523	+6.4%
Retirement Applications Received	5,036	4,697	-6.7%
Retirement Annuities Started	4,017	3,427	-14.7%
Retirement Lump Sums Paid	820	717	-12.6%

Comparing the second quarter of 2023 to the second quarter of 2022, the average turnaround time for a retirement estimate improved from 7.5 days to 5.5 days.

Customer Service - Members

Call volume was similar in the second quarter of 2023 as compared to the same quarter in 2022.

*Matt Stohr*

Reviewed and approved by Matt Stohr, Administrator, Division of Retirement Services  
 Electronically Signed 08/28/2023

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## Customer Service Improvements and Trends

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	Q2 2022	Q2 2023	Change (%)
Calls	52,312	52,254	0.0%
Email	4,713	4,833	+2.5%
Total	57,025	57,087	0.0%

The average speed of answer in the second quarter of 2023 was 4 minutes, 14 seconds, compared to 3 minutes, 45 seconds in the second quarter of 2022. The speed of answer increase was because, members continued to call with questions related to the W-4P tax changes and those calls were complicated and had a long duration.

### Customer Service and Process Improvements

#### Better Website Information for Members

ETF offers members a wealth of information on its website, and staff are always on the lookout for ways to improve this information. During the second quarter, staff added information to simplify the complex topics of powers of attorney and guardianships, and to describe the impact of the new jailers' law (2023 Wisconsin Act 4).

#### More Efficient Handling of Retirement Packets

When a member requests a retirement estimate, they receive an estimate of their individual retirement benefit plus a few forms and brochures in the envelope. This packet of information can be customized as needed. For example, an alternate payee might receive a caution about how the accelerated payment options are calculated based on the estimated social security benefit for the *original member*.

Previously the Member Services Bureau handled this customization of member retirement packets, as well as adding the mailing labels. This improvement moved this process to the Supply and Mail Services (SAMS) unit. Staff were trained on the necessary details of constructing a retirement packet for each member, adding or removing forms and brochures as needed. The transition included training and auditing of staff new to these tasks. The result is time saved to transport retirement packets and paper forms and brochures around the agency, more logical placement of tasks, and more time for benefit specialists to focus on other pressing tasks for members.

ETF is working through many processes with a future state in mind as modernization will change how we do business.

Staff will be at the Board meeting to answer questions.