

Position #030352

Customer Experience Analyst

POSITION SUMMARY

Under the general supervision of the Customer Experience (CX) and Business Initiatives Manager in the Division of Benefits Administration Retirement Services and is enterprise in scope and impact of duties and responsibilities. This is a professional position performing advanced comprehensive program planning, development, implementation, evaluation, and related research and data analytics in support of the agency strategic direction and North Star exceptional Customer Experience (CX) vision that applies to the full employer and member customer lifecycle journey with all ETF-administered pension, insurance, and other benefit plans.

Your responsibilities include leading a cross-functional business/technical workgroup in CX roadmap planning for all components including strategic alignment & governance, technology & data, policies & processes, employee experience, customer understanding through quantitative and qualitative data, customer-centric culture. The work involves:

- Project management roles in leading the planning and execution of strategic initiatives, projects, and activities,
- Business intelligence assignments for customer data and research analysis,
- Creating and delivering complex benefit program content to customers in both traditional sources and digitally through modern technology systems and tools,
- Product ownership for member and employer customer online portals for conducting digital business with ETF involving translation of customer needs and requirements into the technical product specifications and prioritizing technology features considering technical details but based on business value.
- Participation in general benefits administration existing and modified statutes and code, policies and business processes with CX and operational efficiency/effectiveness lens.
- Business analysis services and support for technology modernization projects and other agency transformation initiatives.

Assignments are difficult and complex and require extensive ETF program knowledge, interaction with all layers and organizational units across the agency, and consideration of diverse customer segment stakeholder perspectives. The position independently identifies and resolves conflicts and problems through skilled application of business knowledge as well as technology and data capabilities. The work of this position impacts over 1,600 participating state and local WRS employers and 690,000 members (those actively working, in-actives, annuitants, survivors & beneficiaries).

This position requires commitment to creating a diverse and inclusive work force and equity in treatment of customer and business partner stakeholders.

GOALS AND WORKER ACTIVITIES

20% GOAL A: Development and Management of Plans and Proposals Supporting the Department's CX North Star, Strategic Goal, and Vision

- A.1. Monitor, analyze, and report progress of initiatives, projects, and activities under the CX roadmap components (strategic alignment & governance, customer understanding, customer-centric culture, policies & processes, technology & data, employee experience) to executive leaders, governing boards, and manager and staff groups.
- A.2. Lead cross-functional workgroups and teams in gathering and analyzing data and information and drawing conclusions to inform updates to and rewrites of the CX roadmap across all roadmap components (strategic alignment & governance, technology & data, policies & processes, employee experience, customer understanding / Voice of Customer, customer-centric culture).
- A.3. Incorporate and align the agency Business Capability Model components for Managing Member & Employer Lifecycles and Engagement with maintaining the CX roadmap.

- A.4. Incorporate and align the agency Modernization Guiding Principles (Engage People, Enhance CX, Business Drives Direction, Consider Data an Asset, Provide Capabilities that Fit ETF Needs, Focus on Value, Protect Information, Leverage Proven Solutions) with maintaining the CX roadmap.
- A.5. Develop CX strategic initiative charters and lessons learned documents and present them to the agency Strategic Council for review and approval.
- A.6. Develop CX project proposals supported by sound data analysis with resource requirements to the agency Project Portfolio Committee for review and approval.
- A.7. Lead and collaborate with the cross-functional CX Workgroup and organizational units across the department to identify and initiate CX improvement activities within day-to-day operations.
- A.8. Perform project manager role for CX efforts and mentor others in CX leadership and change management roles.
- A.9. Remain current on CX research, literature, trends, and best practices, and evaluate their application for ETF as a public employee benefits administration organization.

20% GOAL B: Member and Employer Customer Research, Data Analytics, Business Intelligence Support for Decision-making Using Actionable Insights

- B.1. Identify sources and collect and analyze quantitative customer data on aggregated bases and by various customer segments.
- B.2. Conduct research on customer behaviors and preferences through direct and indirect contact with members and employers in combination with program participation data and ETF operational data.
- B.3. Validate data and research findings for quality and integrity.
- B.4. Build and maintain a data-based customer persona library.
- B.5. Develop and implement plans for persona-based customer journey mapping and/or other Voice of Customer programming advancements.
- B.6. Consult and participate in the development, administration, and analysis of recurring and ad hoc customer surveys conducted within new modernization online applications or through email or postal mail processes.
- B.7. Transform customer data into actionable insights for planning and implementing CX improvements while also considering operational cost/benefits.
- B.8. Present data analyses and customer research findings through reports, visualizations, and stories to internal and external groups.
- B.9. Utilize available technology systems and tools to manage customer data and information.
- B.10. Actively participate in the department's research activities for new technology opportunities for customer relationship management in conjunction and alignment with pension administration system modernization project efforts.

15% GOAL C: Creation and Delivery of Benefit Programs Content Aligned with the Department's CX Vision and Voice of Customer feedback

- C.1. Develop and maintain extensive program and operations expertise to effectively manage the development of member and employer program educational and instructional materials, including formats, methodologies, technologies, etc. based on evidence of customer needs and preferences.
- C.2. Develop and implement benefit education and promotion strategies, including targeted campaigns about WRS benefits including customer feedback mechanisms to inform continuous improvements.
- C.3. Formulate objectives and establish short- and long-range goals for a comprehensive enterprise employer engagement framework that meets needs from the employer customer point of view.
- C.4. Design and review education and communication plans and customer surveys, write objectives, select methodologies and formats that are most appropriate for various audiences.
- C.5. Establish marketing strategies for education and engagement activities: large member group sessions, topical and change-related sessions, appearances at employer groups, video conferences and customized one-on-one training for new or potential employers and new staff of existing employers and forums for eliciting member needs from their point of view.
- C.6. Independently analyze effectiveness of ETF sponsored trainings, forms, online messaging, surveys, and/or focus groups of state and local participating employers, employees, and ETF staff from the customer and employee points of view. Identify overall education needs and implement strategies to accomplish education and engagement objectives.
- C.7. Develop, plan and coordinate efforts to educate members and employers about current issues and administrative changes in statutes/rules as they occur in their preferred channels and formats.
- C.8. Explore and utilize meeting and conferencing technologies and participate in updating trainings and program materials. Apply new knowledge and state-of-the-art techniques/technologies to ongoing member/employer education assignments based on customer input and feedback.
- C.9. Report on progress through written and oral reports as requested/required by management.
- C.10. Establish policies and procedures for the administration of the ETF Member and Employer education programs.

20% GOAL D: Performance of Product Owner role for online member and employer customer portals

- D.1. Actively participate in the planning and development of technology solution projects, enhancements, and upgrades to ensure customer portals meet both operational and customer experience needs while maintaining an enterprise vision and strategy throughout the entire product lifecycle.
- D.2. Engage business resources as needed for project planning, requirements, development, customization, configuration, implementation, and ongoing support and maintenance.
- D.3. Ensure that operational and technical support plans are developed during the project through transition to production, and for ongoing support and maintenance including defining pathways for internal and external users, involving technical support groups, vendors, business users, and other stakeholders and partners as necessary.
- D.4. Manage the product post-production features and enhancements to meet business priorities and customer and user needs working across functional organizational units and councils, committees, and workgroups as appropriate.

- D.5. Provide post-implementation communications to facilitate knowledge transfer.
- D.6. Recommend modifications and coordinate training and transition management and documentation needs.
- D.7. Act as first-line escalation for support issues not resolved through normal support pathways.
- D.8. Coordinate and validate upgrades, enhancements, messaging content improvements.
- D.9. Serve as the point of contact when technology is updated/changed which the customer portals are dependent upon.
- D.10. Act as the contact for the IT procurement manager regarding needed purchases for effective management of customer portals.
- D.11. Approve and monitor access to and usage of the customer portals.
- D.12. Manage record retention requirements related to the product.
- D.13. Coordinate, facilitate, and communicate customer portal related decisions with all stakeholders.
- D.14. Maintain and prioritize backlogs of enhancements and other changes. When projects or changes are approved, oversee those, and accept or reject.

15% GOAL E: Lead and Participate in Benefits Administration Policy and Business Process Management aligned with CX and Strategic and Operational Goals.

- E.1. Develop expertise and share knowledge with others on benefits administration policies, processes, and operational practices transcending the full benefits program portfolio across end-to-end processes impacting member and employer interactions and overall customer journeys.
- E.2. Collaborate and coordinate with subject matter expert business partners across the department in researching and analyzing enacted and proposed legislative and policy changes to determine actual or potential impacts on customer experience and resource needs of members, employers, and ETF staff.
- E.3. Research alternatives and solve complex benefit program and customer experience issues and make policy precedent-setting and process recommendations to management.
- E.4. Lead and participate in identification and cross-functional implementation of business process improvement efforts including process mapping and data analysis to enhance CX and operational efficiency.
- E.5. Develop and manage policy and business process improvement project plans and present metrics and progress reports to internal and external audiences.
- E.6. Actively participate in the review and update of policy, process, procedure, and/or training and other communication materials to reflect any changes in rules, statutes, contracts, policies, reporting instructions, etc. considering relevant Voice of Customer feedback to meet the needs of various customer groups.
- E.7. Provide input and participate in small- and large-scale business process transformations as part of technology modernization, to improve operations, and to enhance CX.

- E.8. Provide benefit programs and CX training and technical support to new and existing staff as assigned.
- E.9. Provide enterprise CX perspective in project and operations and special assignments.
- E.10. Act as a CX advocate liaison across the department and with entities outside the Department.

10% GOAL F: Representation on Technology Modernization Projects and Other Initiatives related to Workforce and Process Management & Performance Measurement Strategic Goals and other Transformation Efforts as Needed

- F.1 Serve on project teams, workgroups, and committees as a business analyst, CX representative, program subject matter expert, tester, and/or trainer.
- F.2 Provide customer data analytics and insights to project teams and workgroups. Determine sources and methods for incorporating direct and indirect Voice of Customer into design, development, testing, implementation, and ongoing maintenance of new or modified technology solutions.
- F.3. Conduct and share results of feasibility studies, cost/benefit analyses, and business cases for technology, data, and process change proposals for CX improvements and operational efficiencies.
- F.4. Evaluate customer user impacts and feedback on technology and process change deployments. Capture and document lessons learned for use in future projects and initiatives.
- F.5. Collaborate and partner with the Office of Talent Management on initiatives and activities leveraging the connections between Employee Experience and CX.

KNOWLEDGE, SKILLS & ABILITIES

1. Extensive knowledge of ETF mission, programs, operations, relevant statutes and administrative code, contracts, policies and processes, and technology systems and tools used to administer benefit plans.
2. Foundational knowledge of CX principles and practices.
3. Effective planning and organization skills. Knowledge of strategic planning and goal setting methods and techniques including development of roadmaps and blueprints.
4. Business analysis skills to perform in-depth research and data analysis to determine actionable insights.
5. Critical thinking and problem-solving skills.
6. Knowledge of business process management tools and techniques (value stream mapping; SIPOC method to summarize suppliers, inputs, process, outputs, customers; flowcharts, etc.)
7. Knowledge of program and customer survey and other feedback evaluation methods and techniques.
8. Knowledge of project management principles and ability to lead and facilitate groups without direct authority.
9. Knowledge of methods for establishing and maintaining effective working relationships.
10. Ability to interpret and explain complex information to diverse audiences in various formats.
11. Highly developed communication skills – writing, verbal, public speaking, interpersonal.
12. Ability to plan, set priorities, and lead a major initiative, work collaboratively within a team environment, and work independently.
13. Ability to exercise considerable independent judgment.
14. Ability to acquire and apply new knowledge and skills.
15. Ability to use complex software tools and systems and teach and instruct on their use by internal teams and customer groups.
16. Ability to adapt to departmental transformation along with changing priorities.
17. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.