



## Agenda Item 8

October 16, 2012

**ITEM NAME:** Customer Service Delivery Transformation Roadmap

**PROGRAM:** Customer Services and Support

**ITEM TYPE:** Information

### **EXECUTIVE SUMMARY**

The Customer Services and Support (CSS) Service Delivery Transformation Roadmap identifies initiatives in support of four key objectives for the coming years.

### **BACKGROUND**

Strategically, California Public Employees' Retirement System (CalPERS) is committed to delivering superior, end-to-end customer service that is adaptive to customer needs. In May 2012, CSS presented an enterprise strategy for transforming service delivery, as part of a 2011-12 CalPERS Business Plan objective. A follow-through objective was included in the 2012-2014 CalPERS Business Plan (Objective 2.1.c) to develop a three-to-five year roadmap and implementation plan to execute the strategy. This agenda item presents the service delivery transformation roadmap.

### **ANALYSIS**

As presented in May 2012, CSS developed four key objectives for service delivery transformation:

- **Access:** Ensure customers can access CalPERS and our services easily through varied methods.
- **Quality:** Deliver value-added, accurate services using customer care principles (e.g., being courteous and professional).
- **Effectiveness:** Efficiently utilize our resources to deliver timely, helpful services.
- **Services:** Deliver the right services which are responsive to customer needs.

CSS is continuing to focus on these four objectives through a Wrap-Around Customer Care approach. With this approach CSS is wrapping its services and attention around its customers to ensure they have the best possible customer experience.

To be successful in these areas, CSS is wrapping multiple enablers around its service delivery and enhancement efforts. These enablers fall under four broad categories of People, Process, Strategy and Technology.

The following visual depicts the enablers, objectives and the Wrap-Around Customer Care approach:



CSS has completed the development of a three-year roadmap of opportunities to be explored within each objective (Attachment 1). CSS leaders limited the planning horizon to three years due to the rapid pace of change in the pension and health programs. Additionally, completion dates for some of the roadmap initiatives may be adjusted once CalPERS completes its review of administrative impacts of Pension Reform legislation passed in September 2012. Roadmap tasks are summarized below:

**Access: We are available.**

Using people and process enablers, CSS plans to consolidate employer marketing efforts, creating a seamless CalPERS presence for products and services; additionally, CSS plans to identify and address employer requests for improved access to CalPERS experts. Relying on technology and process enablers, CSS will explore expansion of webinars and computer based training offerings to efficiently reach a wider audience and provide anytime access. The roadmap includes exploration and implementation of additional access channels, such as live chat and mobile applications. It also incorporates expansion of self-services available through the Interactive Voice Response (IVR) system (e.g., customer account balance accessibility).

**Quality: We Get It Right.**

People are at the forefront of CSS's quality efforts with a focus on integrated core competency training for internal staff. This effort will improve the accuracy of and consistency in services provided. The roadmap includes streamlined core business processes, aligning them more effectively with the my|CalPERS solution. It also

relies on technology to introduce a “Voice of the Customer” feedback loop to the CSS operation in order to gain comprehensive satisfaction insight on services (e.g., speech recognition analytics, on-line pop-up surveys to assess ease of use/satisfaction). Additionally, CSS will use technology to improve CalPERS Online website usability (e.g., simplified presentation of content, add easy-reference checklists).

**Effectiveness: We Do It Well.**

In this dimension the roadmap relies heavily on technology enablers such as the use of business intelligence analytics to identify customer trends. Proactive measures can be put into place using this information to broadly address previously unrealized customer needs. Other technology efforts include the rollout of my|CalPERS Member Self Service features, as well as planned system enhancements, and an upgrade of our outdated technology to unleash state-of-the-art contact center management/operational capabilities (e.g., skill-based routing). The roadmap utilizes process and people enablers to reduce backlogs generated during my|CalPERS system stabilization. Strategy enablers for this objective include marketing of the my|CalPERS system, and utilization of social media to enhance CalPERS outreach, and also develop a robust support structure for customer-specific issues raised via social media channels.

**Services: We Provide What You Need.**

The roadmap includes process enablers to implement protocol for resolving complex customer issues more timely, especially those that cross multiple functional areas; and technology to enhance and ensure a coordinated look and feel of electronic subscription services (eAgenda, ePress Alert, Employer eBulletin). In the future, CSS intends to use technology to offer multi-lingual services (e.g., computer based training, CalPERS Online, webinars), and perform event-triggered outreach to customers based on transactions they perform (e.g., adding a spouse to health triggers outreach to update beneficiary). Strategy enablers will allow CSS to expand education programs to reach customers at key points in their life cycle, such as earlier in their career.

Progress in all of the objective areas is envisioned throughout the planning horizon, though Year One focuses most attention on effectiveness and access. Year Two continues to focus resources and attention on effectiveness and access, but also adds more emphasis on quality. By Year Three, with significant progress made in effectiveness, the roadmap directs attention toward expanded services. At the end of this effort, CSS envisions true service delivery transformation. CSS expects to follow an iterative planning process, to continually monitor and improve customer experience, in order to ensure delivery of superior, end-to-end customer service that is adaptive to customer needs.

**ATTACHMENTS**

Attachment 1 – CSS Service Delivery Transformation Roadmap

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