



Agenda Item 9

February 18, 2015

ITEM NAME: Customer Services and Support Performance

PROGRAM: Customer Services and Support

ITEM TYPE: Information

EXECUTIVE SUMMARY

Customer Services and Support (CSS) is committed to achieving the highest level of service in administering pension and health benefits. By continuously measuring performance in all core operations we are able to adapt to the ever changing customer service environment while enhancing our service delivery. This information item presents the CSS Performance Dashboard for the second quarter of Fiscal Year (FY) 2014-2015 and a status update on our projects designed to enhance the customer experience.

STRATEGIC PLAN

This item supports the California Public Employees' Retirement System (CalPERS) Strategic Plan Goal B: "Cultivate a high-performing, risk-intelligent, and innovative organization," as well as our objective to "deliver superior, end-to-end customer service that is adaptive to customer needs."

BACKGROUND

The CSS Performance Dashboard captures our service levels and measures the impact of service and process improvements on our operational effectiveness and customer experience.

As part of our ongoing service delivery transformation, CSS engages in many projects aimed at optimizing the customer experience by improving the access, effectiveness and quality of our services. We monitor the effectiveness of on-line services as part of the Full Voice of the Customer Satisfaction initiative created as a channel for our customers to provide valuable feedback which will aid in our mission for enhancing the customer experience. Additionally, we implemented strategies based on the Lean Six Sigma methodology to improve our disability retirement determination process.

ANALYSIS

CSS Performance Dashboard

To allow the Board of Administration to evaluate whole programs most effectively, we report broad indicators of performance and exceptions requiring further attention in our Performance Dashboard (Attachment 1). For the second quarter FY 2014-2015, CSS reflects a green status in all performance attributes. We included additional information regarding membership determinations and call-wait times.

Customer Contact Center New Metrics and Technology

In July, the Customer Contact Center implemented an improved service level of answering 80 percent of calls within 60 seconds. When moving from the previous six minute service level to a one minute target, we anticipated, and saw, a yellow status in the first quarter, largely due to the high call volumes associated with Health Plan Statement mailings and Open Enrollment during this reporting period.

As expected, the call wait time service level for the second quarter improved and we achieved a green status. Looking into the third quarter, we anticipate operating at high service levels while continuing to strive to exceed customer expectations in all our dashboard attributes.

Additionally, the Customer Service and Outreach Division recently completed implementation of customer flow management technology throughout all eight Regional Offices. This new technology helps manage customer flow in the lobby and also provides data to help manage and strategize operations. This new data enables us to see what is happening in every Regional Office on a real time basis for intraday management. Over time, we anticipate utilizing this new data to identify trends and analyze appointment activity at our Regional Offices.

Membership Determinations

The membership team continues to process recently received work items within service levels while working to reduce total inventory. The team resolves high priority membership issues as they arise.

CSS Projects Update

Full Voice of the Customer

The Full Voice of the Customer Project is dedicated to empowering CalPERS customers by creating satisfaction surveys covering a wide range of our business processes and services. Through our customers' survey responses, we are able to identify and implement customer service improvements if needed.

During the second quarter, an average of over 90 percent of users reported they were satisfied or very satisfied with each of the five Member Self-Service transactions for which we offer a survey: Address Change, Maintain Payment Options, Retirement Estimate Calculator, Apply for Retirement, and Designate a Beneficiary.

In December, we implemented our first on-line business partner surveys. Falling in line with our member surveys, the business partner surveys allow us to gather feedback on the myCalPERS New Health Enrollment and Payroll Reporting processes. The survey questions cover satisfaction with the ease of navigating through and completing these transactions.

Additionally, we developed two written comprehensive surveys covering Service Retirement and Service Credit Purchasing. By working closely with leaders from these program areas we developed questions that meet the need for targeted feedback on key processes and customer service. We partnered with Public Affairs to create a design for these surveys that is both economical to produce and simple for our customers to complete and return (Attachment 2). We look forward to reporting results from these surveys in future quarterly updates.

Disability Retirement Determination Process Improvement

Inspired by the Lean Six Sigma methodology we have implemented improvements to our disability retirement determination processes that rely on collaborative team efforts to increase performance by systematically refining key process points. An example of a change we implemented is to proactively reach out to customers to obtain additional information and documents as needed. This allows us to gather the necessary information to complete the determinations more timely.

Since the implementation of these new process improvements, early data analysis indicates progress has been made and we will report on this progress in the upcoming months.

BUDGET AND FISCAL IMPACTS

Not Applicable

BENEFITS/RISKS

Not Applicable

ATTACHMENTS

Attachment 1 – Customer Services and Support Performance Dashboard –
October 1, 2014 – December 31, 2014

Attachment 2 – Comprehensive Survey Sample: Service Retirement and
Service Credit Purchase

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