



Agenda Item 8

August 18, 2015

ITEM NAME: Customer Services and Support Performance Update

PROGRAM: Customer Services and Support

ITEM TYPE: Information

EXECUTIVE SUMMARY

Customer Services and Support (CSS) is dedicated to achieving the highest level of service in administering pension and health benefits. By continuously measuring and evaluating performance in all core operations we are able to adapt to the ever changing customer service environment and diverse needs of our customers by improving our service delivery. This information item presents the CSS Performance Dashboard for the fourth quarter of Fiscal Year (FY) 2014-2015 and highlights a few 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.

During the fourth quarter we completed initiatives from our 2014-2016 Business Plan which were part of our Service Delivery Transformation Roadmap (Roadmap). A brief discussion related to the completed Roadmap projects are highlighted in this update as well our performance dashboard update.

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).

Our performance metrics for the fourth quarter FY 2014-2015 show a green status reflecting high performance in all four value drivers: Customer Experience, Customer Education, Compliance, and Operational Effectiveness.

The membership team continues to reduce backlog inventory and is expected to continue this trend into the new fiscal year.

The Customer Contact Center improved performance with call wait times and is currently meeting targets.

Full Voice of the Customer Project

The Full Voice of the Customer Project implements and administers customer satisfaction surveys on a wide range of business process and services. During the fourth quarter, the project team implemented two written mailed comprehensive surveys covering Service Credit Purchasing and Service Retirement and developed four additional surveys measuring customer satisfaction with Disability Retirement, Death Benefits, Refunds, and the Internal Revenue Code 415(b) Replacement Benefit Plan. This range of surveys will allow us to gauge satisfaction and target improvements for each step in these processes. We will begin reporting on the results of the Service Retirement and Service Credit Purchasing surveys in our next performance update.

Service Delivery Transformation Roadmap

We saw the successful conclusion of several projects spanning the last three years covered by our Roadmap. Through the Roadmap projects, CSS achieved substantial improvements in the areas of Quality, Effectiveness, Access, and Services.

Roadmap projects contained in the Quality section implemented universal training in core customer service competencies for CSS staff, as well as identified and achieved usability improvements for CalPERS Online.

Achievements under the Effectiveness section include taking advantage of Business Intelligence Analytics for our operations and the upgrade of call management technology in the Customer Contact Center.

Highlights of projects contained in the Access section include the expansion of computer-based training classes and webinars and the development of a resource manual to help new employer staff become proficient with myCalPERS.

Among other achievements, projects that were part of the Services section succeeded in implementing a more effective and cohesive system for managing complex cases—those that defy simple resolution and require coordinated collaboration between multiple areas of CalPERS. Additionally, we simplified how members find information online and in print by using related life and career events as markers when they search for needed information.

As we enter FY 2015-2016 we will continue to find ways to optimize the customer experience through innovative service enhancement efforts.

BUDGET AND FISCAL IMPACTS

Not applicable

BENEFITS/RISKS

Not applicable

ATTACHMENTS

Attachment 1 – Customer Services and Support Performance Dashboard:
April 1, 2015 – June 30, 2015

DONNA RAMEL LUM
Deputy Executive Officer
Customer Services and Support

ANN BOYNTON
Deputy Executive Officer
Benefit Programs Policy and Planning