



National Council on Teacher Retirement

Customer Service Network Workshop

Co-hosted by Minnesota Teachers Retirement Association

June 11–13, 2017

Location of Workshop: Minnesota TRA, 60 Empire Drive, Suite 400, St. Paul, MN 55103

Hotel: The Saint Paul Hotel, 350 Market Street, St. Paul, MN 55102 (651) 292-9292

Meet in Hotel Lobby for workshop and dinner departures

AGENDA

Sunday, June 11

6:30 pm Welcome Reception and Dinner at hotel

Monday, June 12

8:00 am Breakfast on your own at hotel

9:00 Shuttles depart for Minnesota TRA

9:15 Welcome from the National Council on Teacher Retirement

Meredith Williams, Executive Director, NCTR

Robyn Wheeler, Assistant Executive Director, NCTR

9:20 Welcome to Minnesota TRA

Laurie Hacking, Executive Director, Minnesota TRA

Jay Stoffel, Dep. Exec. Dir., Minnesota TRA; NCTR Immediate Past-President

9:30 Introductions and General Roundtable Discussion

*Discussion Leader: Ed Rezny, Manager, Information and
Communication Services, NYSTRS*

10:30–10:45 Break

10:45 Resume Roundtable Discussion

11:30 Tour of Minnesota TRA

12:30 pm Group Lunch

1:30 Web Self-Service Tools

John Cardillo, Manager of Public Information, NYSTRS

2:30–2:45 Break

2:45 Roundtable Discussion: Membership Information

Best practices for maintaining and leveraging key member data elements.

3:45 Monday Wrap-Up.

4:00 Shuttle back to hotel

5:30 Meet in lobby to shuttle to dinner

9:00 Shuttle back to hotel





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Tuesday, June 13

- 8:30 am Breakfast on your own at hotel
- 9:30 Shuttles depart for Minnesota TRA
- 10:00 Performance Indicators to Measure Customer Service**
KPIs, SMART Goals, scorecards/dashboards, ASA, and more!
Presentation by ForeSee
- 11:00 Roundtable Discussion: “Customer Service” Benchmarking**
- Noon Group Lunch
- 1:00 pm Educating throughout Career Stages**
Susan Wood, Director of Communications, PSRS/PEERS Missouri
- 2:00 Roundtable Discussion: Internal Customer Service**
How your work culture supports exceptional customer service (cross-function teams, technology in work processes, internal communication, and education best practices).
- 3:00–3:15 Break
- 3:15 Roundtable Discussion: Employee-of-the-Month and Beyond**
A discussion of innovative approaches to recognizing great performing employees and customer service.
- 4:15 Workshop Wrap-Up**
- 4:30 Shuttle back to hotel
- 6:00 Meet in lobby for short walk to dinner

Wednesday, June 14

Departures

