



NATIONAL COUNCIL *on*
TEACHER RETIREMENT
*Supporting Retirement Security
for America's Teachers*

CUSTOMER SERVICE NETWORK WORKSHOP

Co-hosted by Teachers Retirement System of Georgia

June 11 – 12, 2018

Location of Workshop and Attendee Hotel:

Renaissance Hotel, 866 W. Peachtree Street, NW, Atlanta, GA 30308

Meet in hotel lobby for tour and dinner departures

Agenda

Sunday, June 10, 2018

6:30 pm Welcome Reception and Dinner at hotel

Monday, June 11, 2018

8:00 am Group Breakfast (Hotel)

8:50 – 9:00 am Welcome from the National Council on Teacher Retirement

Maureen Westgard, Executive Director, NCTR

Robyn Wheeler, Assistant Executive Director, NCTR

Welcome to Atlanta

L.C. "Buster" Evans, Executive Director Georgia TRS

9:00 – 10:30 am Introductions and General Roundtable Discussion

Robyn Wheeler, Assistant Executive Director, NCTR

10:30 – 10:45 am Break

10:45 – 11:45 am Future Ready – Emerging Technologies and Customer Service

*Paige Donaldson, Director of Contact Management/Employer Services,
Georgia TRS*

11:45 – 12:45 pm Lunch

12:45 – 1:40 pm Travel

1:40 – 2:40 pm CNN Tour

2:40 – 3:30 pm Travel to Georgia TRS

3:30 – 4:30 pm Tour of Georgia TRS

6:00 pm Meet in Lobby, Walk to Group Dinner



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Tuesday, June 12, 2018

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|-------------------------|---|
| 8:30 am | Group Breakfast (Hotel) |
| 9:30 – 10:30 am | Federal Relations Update
<i>Leigh Snell, Federal Relations Director, NCTR</i>
- Divestment/Engagement/Update on Federal Issues |
| 10:30 – 10:45 am | Break |
| 10:45 – 11:45 am | Disaster Recovery – What have we learned, how can we better prepare?
<i>Andrew Bradford, Chief Risk Officer, New York City TRS</i>
<i>Maureen Westgard, Executive Director, NCTR</i> |
| Noon | Group Lunch |
| 1:00 – 2:00 pm | Customer Service & Compliance
<i>Ed Rezny, Deputy Director of Member Relations, New York STRS</i> |
| 2:00 – 3:00 pm | Elderly Account Takeover
<i>Robert Powers, Call Center Manager, Illinois TRS</i> |
| 3:00 – 3:15 pm | Break |
| 3:15 – 4:00 pm | Keeping Customer Service “Humanized” in a Data Driven World
<i>Lisa M. Hajj, Communications Director, Georgia TRS</i> |
| 4:00 – 4:30 pm | Wrap-up |
| 6:00 pm | Meet in Lobby, Walk to Group Dinner |

Wednesday, June 13, 2018

Departures