

# DAY ONE

THE NATIONAL COUNCIL ON TEACHER RETIREMENT PRESENTS

## CUSTOMER SERVICE WORKSHOP

VIRTUAL | December 8 & 9 | AGENDA

WEDNESDAY, DECEMBER 8, 2021 (times are noted in ET)

11:00 – 11:15 a.m. (ET)

### Welcome from the National Council on Teacher Retirement

- *Robyn Wheeler, Assistant Executive Director, NCTR*
- *Dean Kenderdine, Executive Director, NCTR*

11:15 – 12:30 p.m.

### Introductions & General Roundtable Discussion

Theme: Re-Opening

12:30 – 12:45 p.m.

Break

12:45 – 1:45 p.m.

### Member Engagement

*Engagement with members during pandemic and beyond; what technologies have changed and what new procedures are being used going forward?*

- *Group Discussion*

1:45 – 2:00 p.m.

Break

2:00 – 3:00 p.m.

### Employee Engagement

*Engagement with employees during the pandemic and beyond. What steps did you take (or plan to take) to ease the transition from working virtually to returning to the office?*

- *Group Discussion*

3:00 – 3:15 p.m.

Break

3:15 – 4:00 p.m.

### Federal Relations Update

*An update on current issues impacting the pension fund industry.*

- *Leigh Snell, Federal Relations Director, NCTR*

4:00 p.m.

Wrap Up of Day 1



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# DAY TWO

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## CUSTOMER SERVICE WORKSHOP

VIRTUAL | December 8 & 9 | AGENDA

THURSDAY, DECEMBER 9, 2021 (times are noted in ET)

11:00 a.m. – Noon (ET)

### Cyber Security

*How do you balance the amount of security built into your processes and online tools to enable members to use them easily, while also protecting their information from being compromised.*

- Andrew Bradford, Chief Risk Officer, New York City TRS
- Nitai Mandhyan, Sr. Vice President & Deputy Practice Leader, Aon Cyber Solutions

Noon – 1:00 p.m.

### Financial Wellness Tools

*A discussion with the Virginia Retirement System on implementation of the Financial Wellness Tools on their website.*

- Deardrian Carver, Chief Customer Relations Officer, Virginia Retirement System
- Virginia Sowers, Communications Strategy Manager, Virginia Retirement System

1:00 – 1:15 p.m.

Break

1:15 – 2:15 p.m.

### Quality Assurance Tools

*How do you inspect what you expect?*

- Ed Rezny, Chief Customer Officer, NYSTRS
- Katie Dalzell, Member Communication & Outreach Supervisor, Minnesota TRA

2:15 – 2:30 p.m.

Break

2:30 – 3:30 p.m.

### Membership Outreach – How to Engage Younger Members

*What techniques have systems successfully used to attract younger members to messaging (ex. chat, videos, social media)?*

- Group Discussion

3:30 pm

### Wrap Up of Day 2 & Open Discussion

- Robyn Wheeler, Assistant Executive Director, NCTR
- Dean Kenderdine, Executive Director, NCTR



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