# CUSTOMER SERVICE WORKSHOP

**DAY ONE**

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

<table>
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<th>Time</th>
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| 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** |
## DAY TWO

**THE NATIONAL COUNCIL ON TEACHER RETIREMENT PRESENTS**

**CUSTOMER SERVICE WORKSHOP**

VIRTUAL | December 8 & 9 | AGENDA

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

<table>
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| 11:00 a.m. – Noon  | **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 |