

# Customer Service Workshop

The FIDI Hotel, New York, NY

June 9-11, 2024

PUBLIC AGENDA



Sunday, June 9	
6:30 p.m. (ET)	Welcome Reception and Dinner
Monday, June 10	
7:30 a.m. (ET)	Group Breakfast
8:30 a.m.	Meet in Lobby; Walk to New York City TRS
8:45 – 8:50 a.m.	<p><b>Welcome from the National Council on Teacher Retirement</b></p> <ul style="list-style-type: none"> <li>• <i>Dean Kenderdine, Executive Director, NCTR</i></li> <li>• <i>Patricia Reilly, Executive Director, New York City TRS</i></li> <li>• <i>Robyn Wheeler, Assistant Executive Director, NCTR</i></li> </ul>
9:00 – 10:00 a.m.	<p><b>Introductions and General Roundtable Discussion</b></p> <p><b>Navigating Technological Integration in Member Services and Communications for Pension Fund Managers</b></p> <p>In today's rapidly evolving digital landscape, pension fund managers are tasked with navigating the complex terrain of technological integration in member services and communications. The advent of cutting-edge technologies has revolutionized the way pension funds engage with their stakeholders, offering unprecedented opportunities for streamlined communication and enhanced accessibility to information. However, harnessing the full potential of these advancements while ensuring seamless integration into existing customer service processes presents unique challenges, particularly in catering to the diverse needs of older clients who may not be as adept with technology.</p> <p>This session will dive into the intricacies of technological integration within the realm of member services and communications for pension fund managers. Attendees will share valuable insights on navigating the complexities of incorporating new technologies while maintaining a customer-centric approach, through a comprehensive exploration of best practices and real-world examples. Join us as we explore the intersection of technology and member services, empowering you to leverage innovative solutions for superior client engagement and satisfaction.</p> <p><b>Led by</b> <i>Darla Fitzpatrick, Communication Manager, Montana Teachers' Retirement System</i></p>
10:00 – 11:00 a.m.	
11:00 – 11:10 a.m.	Break
11:10 – 12:00 p.m.	<p><b>Strategies for Driving Members to Utilize Online Tools</b></p> <p>This interactive session is designed to explore innovative strategies to drive members to utilize online tools available on the pension fund website. By leveraging digital resources effectively, we aim to enhance member engagement, streamline processes, and empower individuals to take control of their financial futures.</p> <p><b>Led by</b></p> <ul style="list-style-type: none"> <li>• <i>Heidi Brennan, Manager of Education and Outreach, New York State TRS</i></li> <li>• <i>Erica Mortimore, Manager of Member Benefits, New York State TRS</i></li> <li>• <i>Heidi Travis, Deputy Chief Customer Officer, New York State TRS</i></li> </ul>
Noon	Group Lunch

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Monday, June 10 (continued)	
1:00 – 2:00 p.m.	<p><b>Federal Legislative Update: Government Pension Offset (GPO) and Windfall Elimination Provisions (WEP)</b></p> <p>Join us for an informative federal session tailored to provide a comprehensive update on the Government Pension Offset (GPO) and Windfall Elimination Provision (WEP). NCTR’s Director of Federal Relations Leigh Snell will delve into the latest legislative developments, policy changes, and practical implications of GPO and WEP. Attendees will gain invaluable insights into navigating the complexities of these provisions, ensuring accurate administration, and effectively communicating relevant information to stakeholders.</p> <p><b>Presented by Leigh Snell, Federal Relations Director, NCTR</b></p>
2:00 – 2:15 p.m.	Break
2:15 – 3:15 p.m.	<p><b>Enhancing Response Times and Best Practices in Communication &amp; Customer Service Management Post Cyber-Security Breach</b></p> <p>In today's digital age, the protection of sensitive financial data is paramount, especially within the pension fund industry where security breaches can have far-reaching consequences. When a cybersecurity breach occurs, effective communication and customer service management become critical components in mitigating damage, preserving trust, and restoring confidence among stakeholders. During this session, attendees will discuss the necessary strategies and best practices to navigate the aftermath of a cybersecurity breach swiftly and effectively. Gain valuable insights, practical strategies, and hear from your peers on best practices to effectively navigate the complexities of communication and customer service management in the aftermath of a cybersecurity breach.</p> <p><b>Presented by Matt Laskowski, Public Information Officer, New York City TRS</b></p>
3:15 – 3:30 p.m.	Wrap Up for the Day
5:00 p.m.	Meet in Lobby; Depart for Group Dinner
6:15 p.m.	Dinner Cruise
Tuesday, June 11	
7:30 a.m. (ET)	Group Breakfast
8:30 a.m.	Meet in Lobby; Walk to New York City TRS
9:00 – 10:30 a.m.	<p><b>AI Policy Development</b></p> <p>As pension systems evolve to embrace technological advancements, integrating artificial intelligence (AI) into customer service operations becomes increasingly pertinent. This session aims to equip managers of customer service departments and communication staff within pension systems with the necessary knowledge and tools to develop and implement an effective AI policy framework.</p> <p><b>Presented by:</b></p> <ul style="list-style-type: none"> <li>• <i>Ericc Diaz, IT Manager, New York City TRS</i></li> <li>• <i>Nate Haws, Associate Principal Consultant &amp; AI Researcher, Linea Solutions</i></li> </ul>

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## Tuesday, June 11 (continued...)

10:30 – 10:40 a.m.	Break
10:45 – 11:45 a.m.	<p><b>Enhancing Pension Fund Customer Service and Communication: Managing Member Records and Utilizing the Death Master File</b></p> <p>In the dynamic landscape of pension fund management, ensuring the accuracy and currency of member records is vital. Pension fund customer service and communication managers play a pivotal role in maintaining the integrity of member data, utilizing resources like the Death Master File to efficiently manage deceased member records.</p> <p>This session is designed to equip customer service and communication managers with the necessary knowledge and skills to streamline processes for updating and maintaining member records, while also understanding the critical importance of the Death Master File in pension fund management.</p> <p><b>Presented by:</b></p> <ul style="list-style-type: none"><li>• Casey Hartwig, Quality Assurance Manager, Idaho PERS</li><li>• Jean Carlo A. Oviedo, National Director of Sales, ABL Technologies, LLC</li></ul>
12:00 – 1:00 p.m.	Group Lunch
1:30 – 3:30 p.m.	<b>Team Building Activity – Scavenger Hunt</b>
3:30 p.m.	Wrap Up for the Day; Dinner on your own