

Driving Change: 4 Key Questions To Answer

Quirk's discussion

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Who We Are

- Founded in 1945
- Retirement plan services for small and mid-sized organizations (401k and 403b plans)
 - Non-profit
 - Business
 - Tribal entities
 - Governmental
 - Values-based
- Customer Experience Insights function created in 2019

Driving Change

From:

- “I’ve never been a fan of surveys.”
- “Survey anyone you want, just don’t talk to any customers”
- “I’ve been doing this for 25 years ... it’s not like this decision could go too far wrong.”
- “We don’t want to poke the sleeping bear. If we ask them, we might make them realize they have issues.”

To:

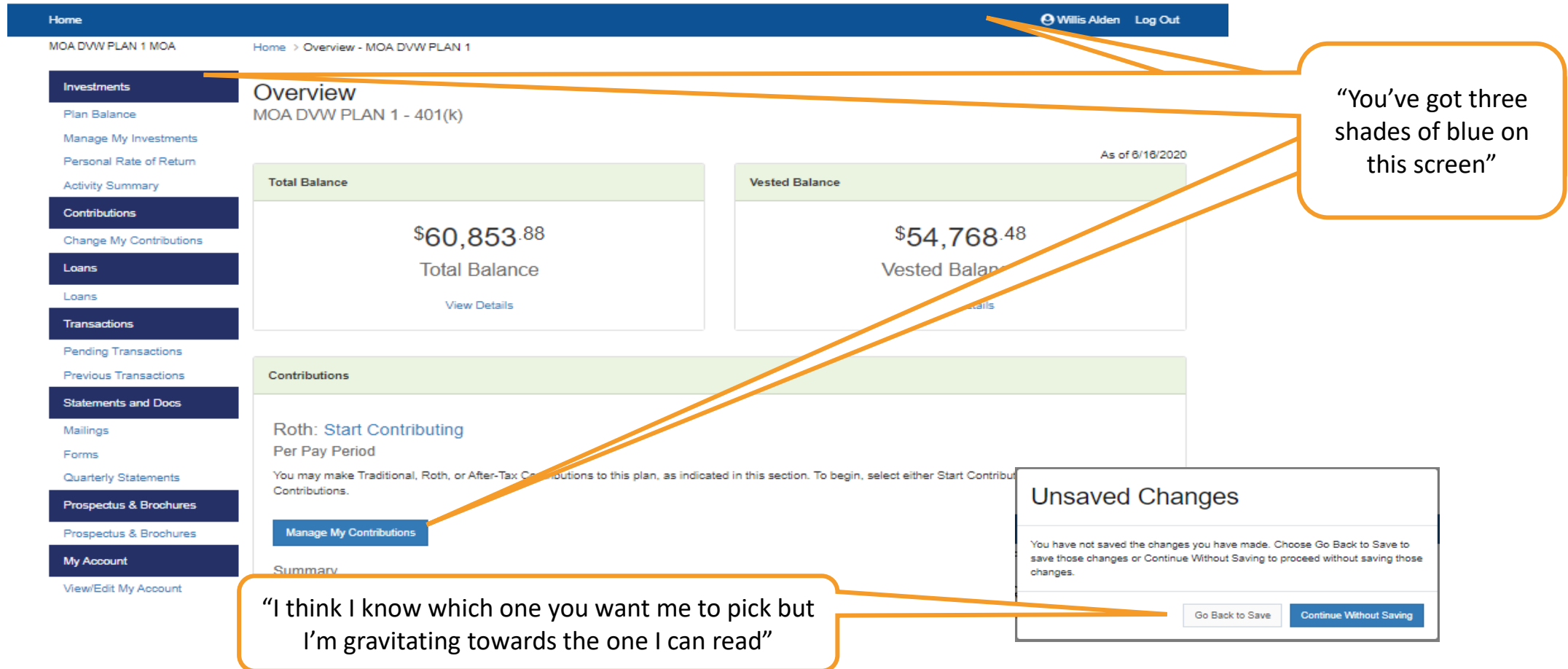
- “I’m learning a lot of things I didn’t know about our customers”
- “The San Fran team jumped on this and resolved the issue so thanks for bringing it to our attention!”
- “Transformative”
- “We find stuff out that has stopped plans from leaving.”

Our Path

Key Questions

- Why do we want to do this? How does the organization benefit?
- How can we go small before we 'go big?'
- What (else) can we do to minimize risk?
- Do we truly believe?

Why do we want to do this? How does the organization benefit?



The screenshot shows a retirement plan portal for "MOA DVW PLAN 1 MOA". The user is logged in as "Willis Alden". The page has a dark blue header with "Home" and "Log Out" links. A left sidebar contains various menu items like "Investments", "Contributions", "Loans", and "Transactions". The main content area shows an "Overview" for "MOA DVW PLAN 1 - 401(k)" as of 6/16/2020. It displays two boxes: "Total Balance" of \$60,853.88 and "Vested Balance" of \$54,768.48. Below these is a "Contributions" section with a "Roth: Start Contributing" button. A "Manage My Contributions" button is also visible. An "Unsaved Changes" modal is open, asking the user to either "Go Back to Save" or "Continue Without Saving".

Home Willis Alden Log Out

MOA DVW PLAN 1 MOA Home > Overview - MOA DVW PLAN 1

Investments
Plan Balance
Manage My Investments
Personal Rate of Return
Activity Summary

Contributions
Change My Contributions

Loans
Loans

Transactions
Pending Transactions
Previous Transactions

Statements and Docs
Mailings
Forms
Quarterly Statements

Prospectus & Brochures
Prospectus & Brochures

My Account
View/Edit My Account

Overview
MOA DVW PLAN 1 - 401(k)
As of 6/16/2020

Total Balance
\$60,853.88
Total Balance
View Details

Vested Balance
\$54,768.48
Vested Balance
View Details

Contributions
Roth: Start Contributing
Per Pay Period
You may make Traditional, Roth, or After-Tax Contributions to this plan, as indicated in this section. To begin, select either Start Contributing or After-Tax Contributions.

Manage My Contributions

Unsaved Changes
You have not saved the changes you have made. Choose Go Back to Save to save those changes or Continue Without Saving to proceed without saving those changes.

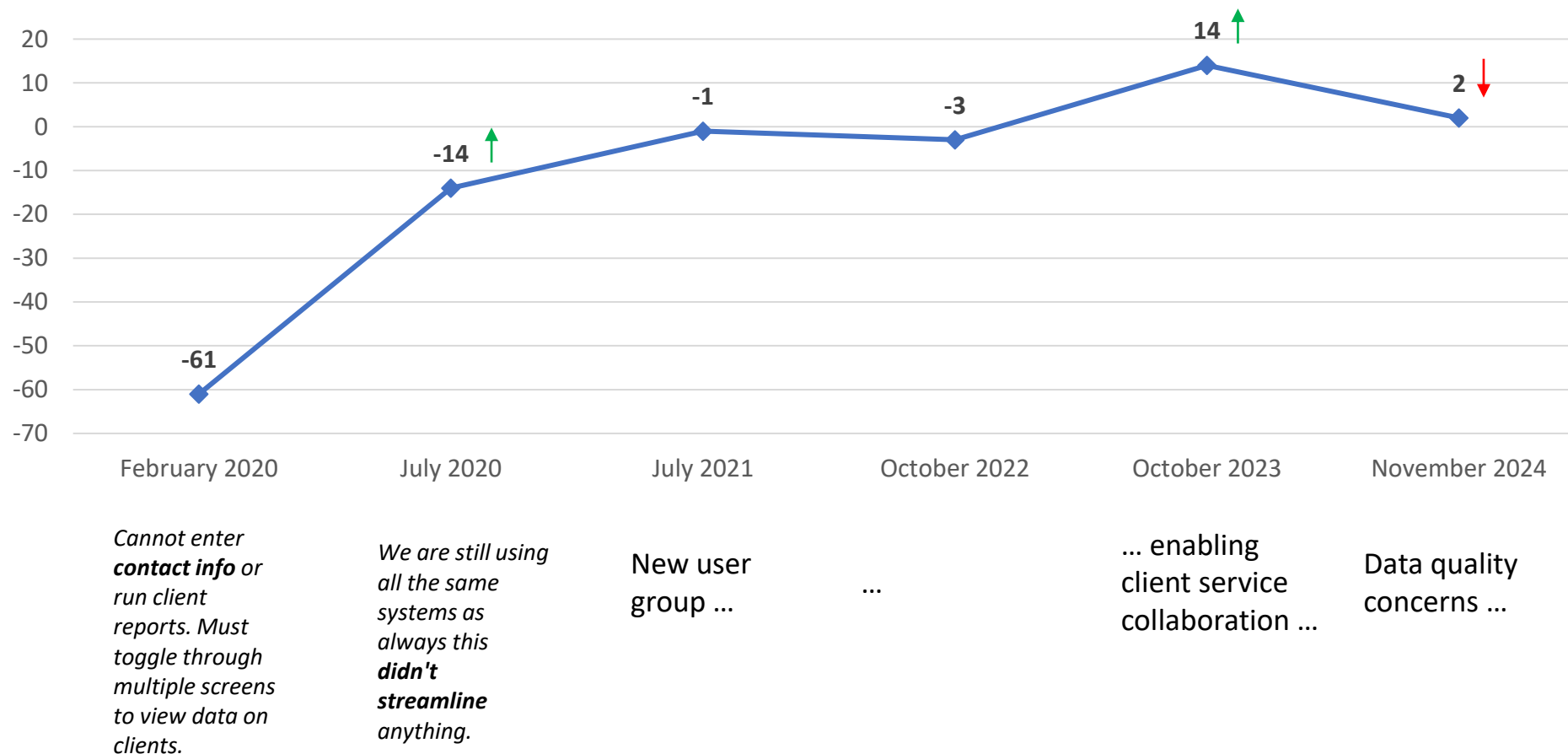
Go Back to Save Continue Without Saving

"You've got three shades of blue on this screen"

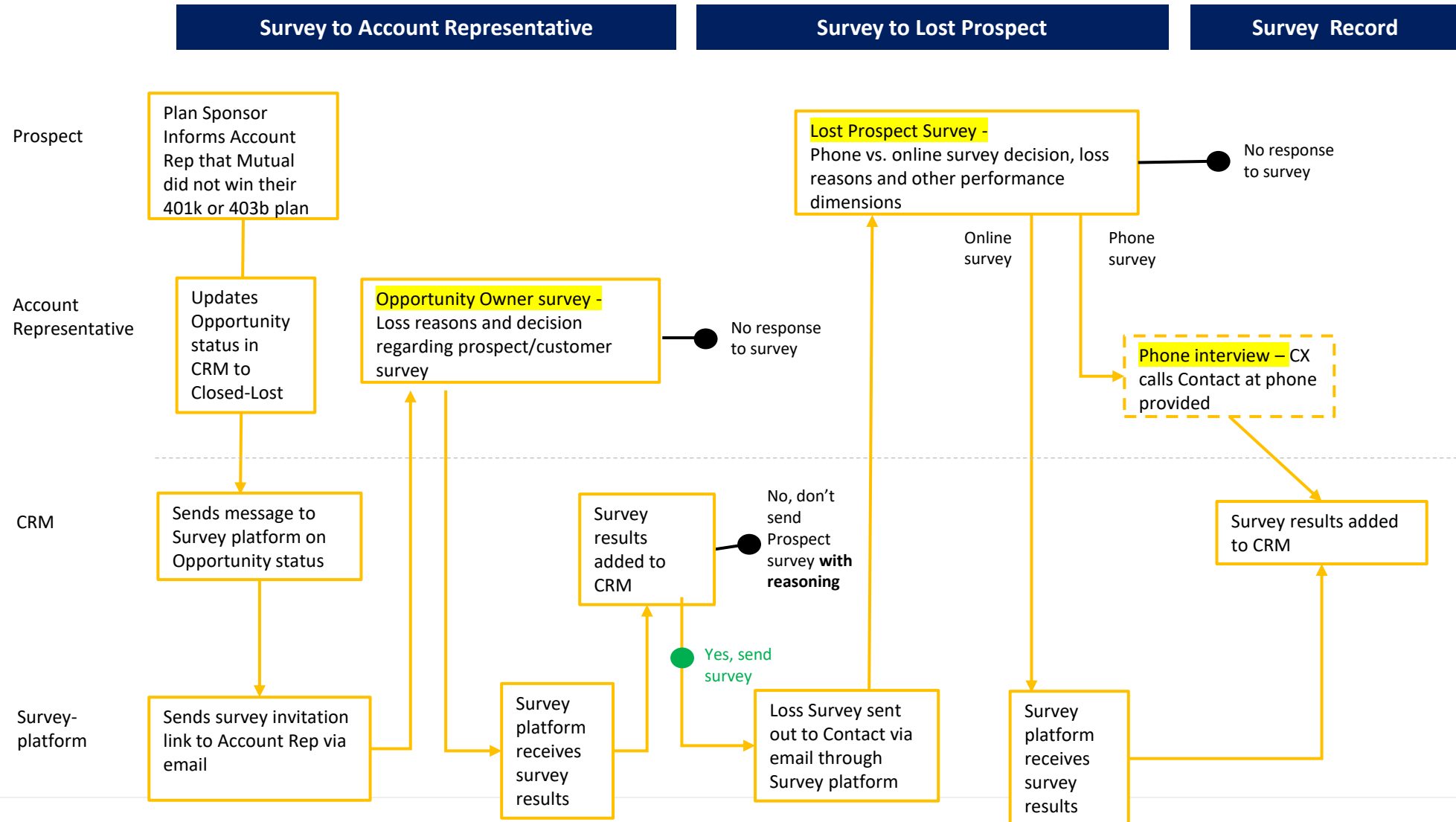
"I think I know which one you want me to pick but I'm gravitating towards the one I can read"

How can we go small before we ‘go big?’

CRM Platform Satisfaction Study



What (else) can we do to minimize risk?



Do we truly believe?

System Migration Satisfaction Study

Likelihood to Recommend Rating	Customers Surveyed	Surveyed Customers Lost	Loss Rate
0/1/2	98	12	12%
3-10	<u>417</u>	<u>9</u>	<u>2%</u>
All	515	21	4%

Wrap-up

- For the changes you drive, answer 4 questions -
 - Why do we want to do this? How does the organization benefit?
 - How can we go small before we ‘go big?’
 - What can we do to minimize risk?
 - Do we truly believe?
- Please rate this session!

Questions

