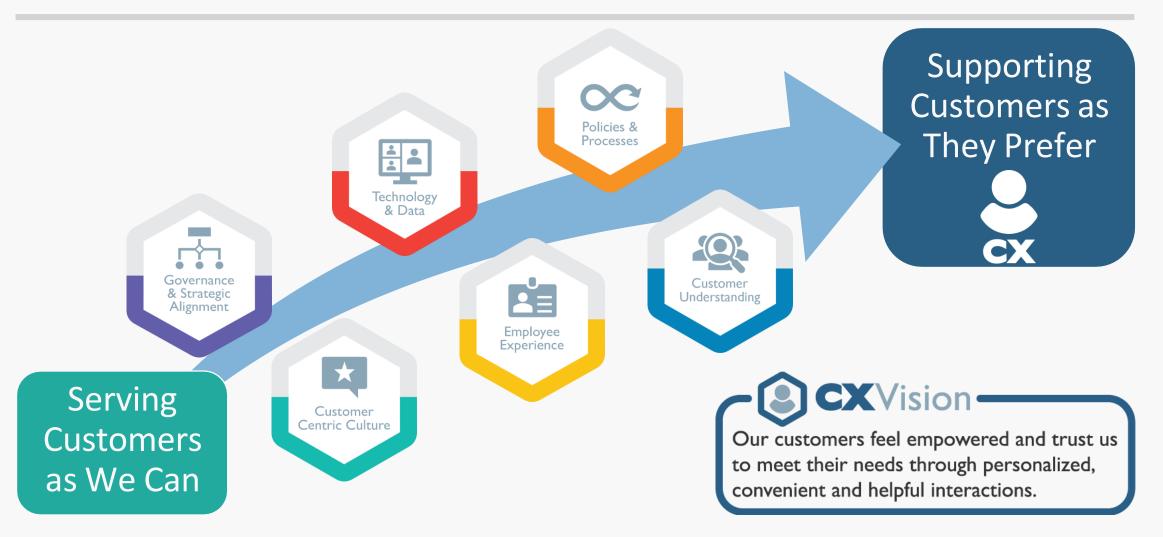# Customer Experience (CX)

Voice of Customer (VoC) Program

Racheal Rolli, Customer Engagement and Education

Customer Experience
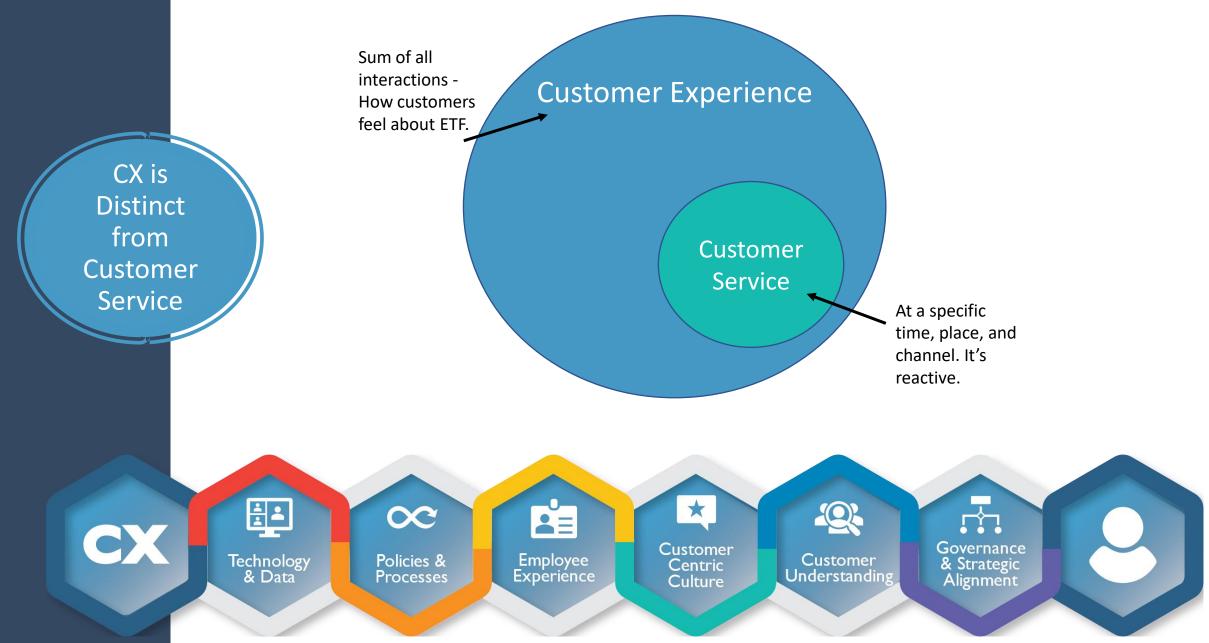
etf

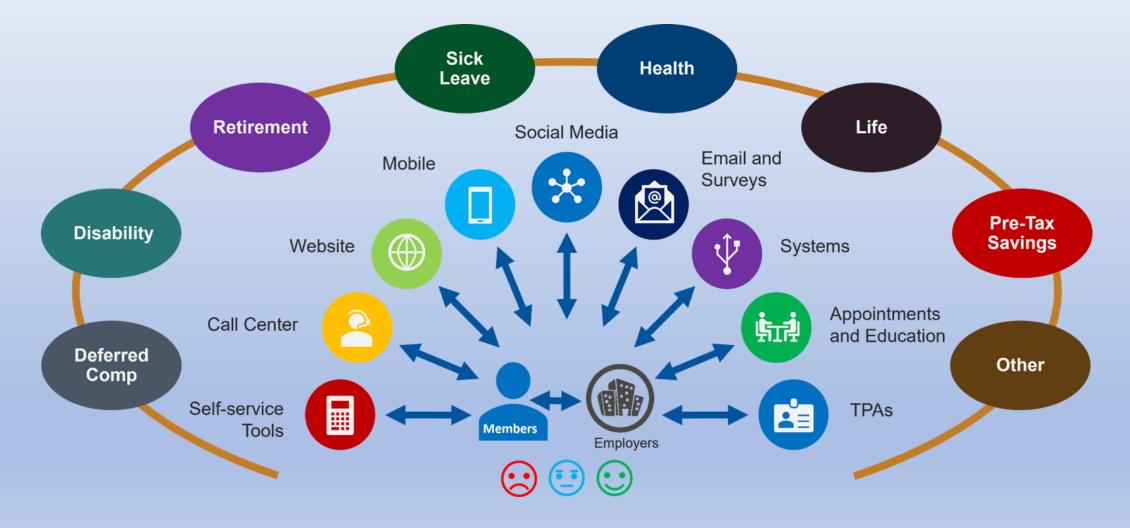# Transforming With the Customer Experience in Mind

Governance & Strategic Alignment

Technology & Data

Policies & Processes

Customer Centric Culture

Employee Experience

Customer Understanding

Serving Customers as We Can

Supporting Customers as They Prefer

CX

CX Vision

Our customers feel empowered and trust us to meet their needs through personalized, convenient and helpful interactions.

etf

Customer Journey

Priority Lump Sum Payments

- Lump sums started with a 60–120-day processing timeframe in case of errors or omissions

- To get an expedited payment, members had to write a letter explaining their "hardship"

- Cross functional team studied and discussed potential impacts

- Updated standard service expectations and allow for variation if needed

The CX Vision is a mindset shift.

FROM inside-out (ETF perspective)

TO outside-in (Customer perspective)

Customer Understanding
Voice Of Customer

VoC Vision:

With VoC we will capture comprehensive customer feedback and analyze it for insights, so that we can act to enhance CX.

What is a Persona?

- Fictional characters that represent a group of our customers

- Typically consists of an image and high-level bullets about the customer and their goals

- Ultimately, personas help identify behaviors, motivations, needs, pain points, and challenges

Retiree Journey Map

	Receives first payment	Annuity adjustments	Open Enrollment and Medicare updates	Tax forms and updates
Rank your experience 1-5? *5 is best and 1 is worst				
What were you **expecting?**				
What were you **thinking?** What **Questions** did you have?				
What were you **feeling?**				
What **touchpoints** did/do you use?				

Questions?