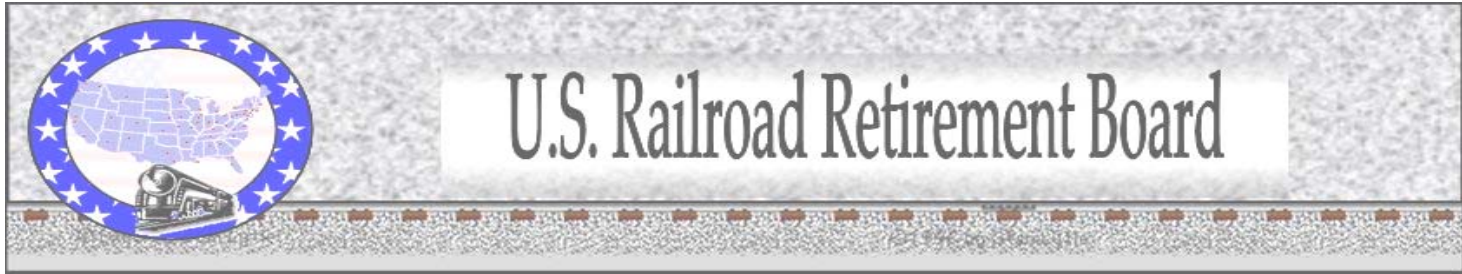


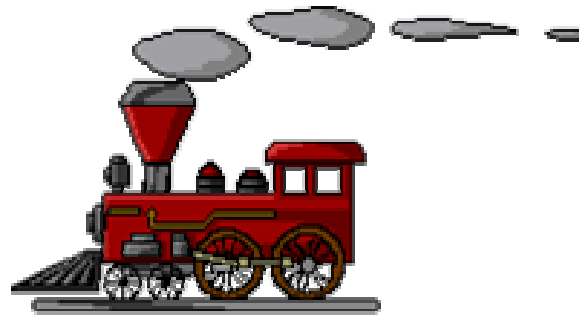
**“Customer Service at the  
Railroad Retirement Board:  
How a small Agency  
Can Make a BIG Difference”**

**Catherine Leyser,**  
Director of Assessment and Training



Or....

**How a small Agency**  
**Can Make a BIG Impact on Our**  
**Customers**



# ACSI Scores

Recent Retirees

82

2001

RRB



Federal Government Average -- 69

# ACSI Scores

Unemployment and Sickness  
Insurance Recipients



75

2002

RRB



Federal Government Average -- 71

# ACSI Scores

Survivors

90

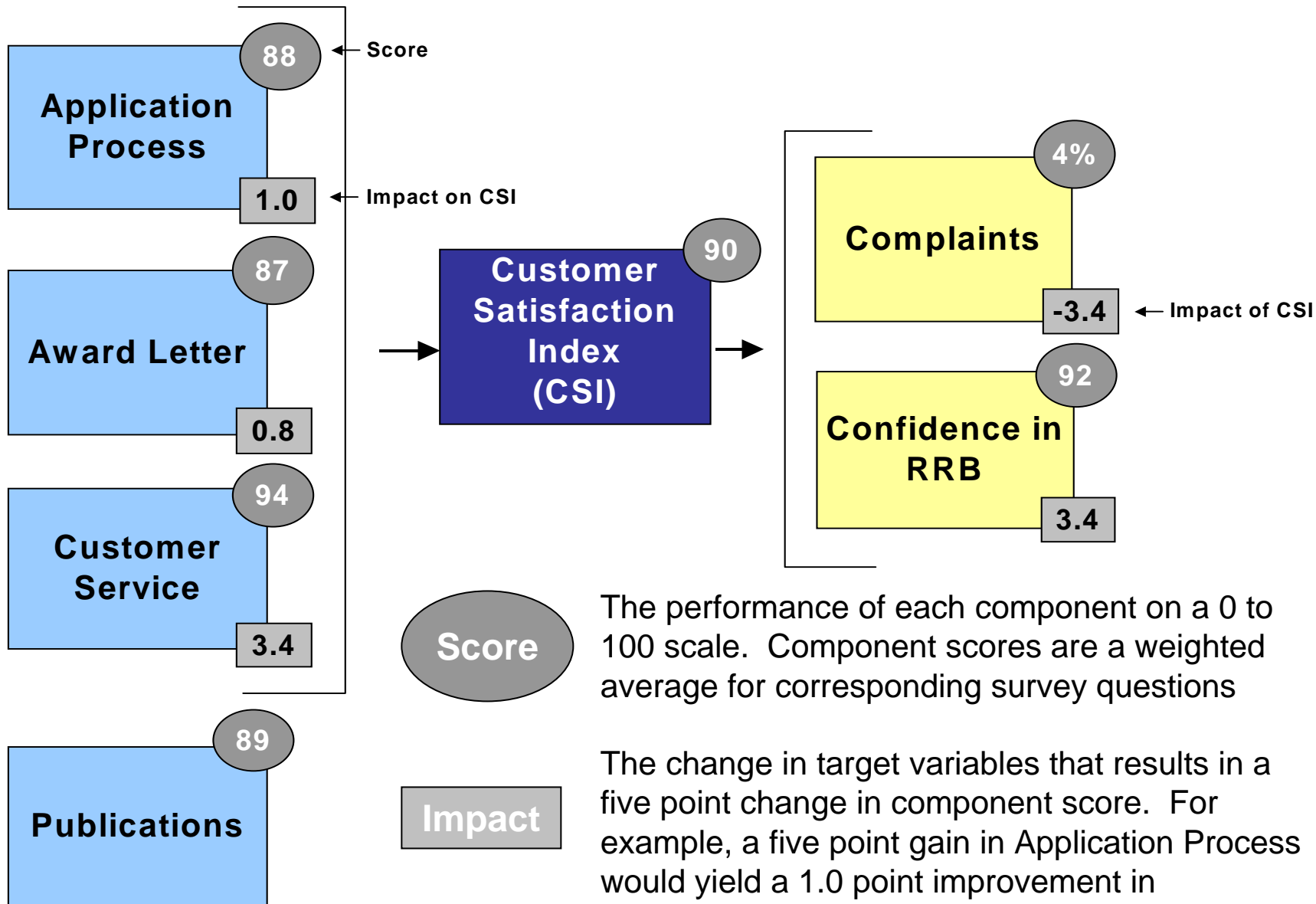
2005

RRB



Federal Government Average -- 72

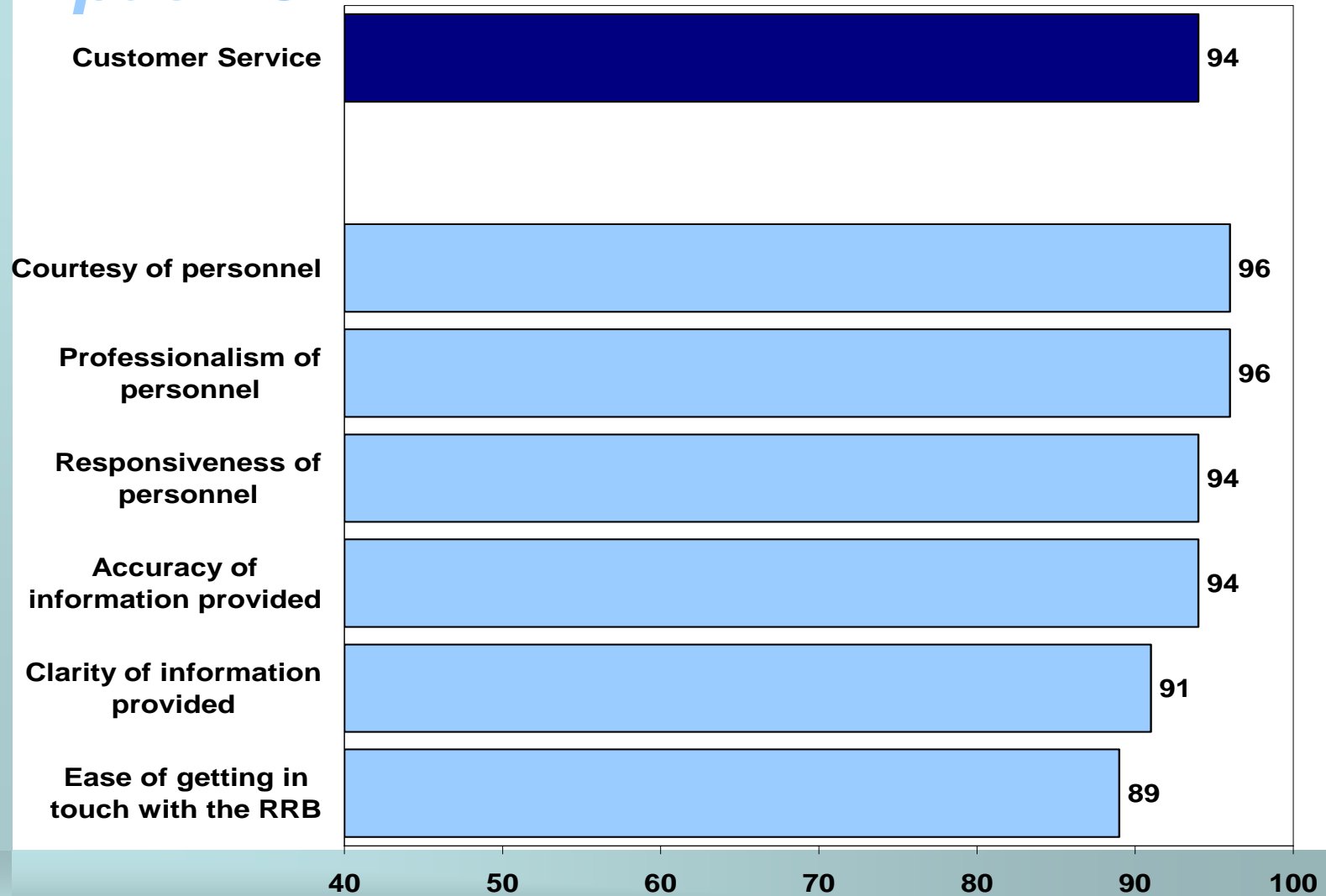
# Survivor Satisfaction Model



# Customer Service

*Impact: 3.4*

These scores reflect recipients' most recent contact with RRB



# Summary of ACSI Findings

- **RRB is among the top performing government agencies**
- **Customer Service is a key strength**
  - Customers appreciate exemplary service (score 94)
  - As is typical, the people are rated higher than the process
  - High impact (3.4) suggest Satisfaction score will slip if customer service ratings decline





# Summary of ACSI Findings



- **Application Process receives strong marks with a score of 88 and has a moderate impact on satisfaction (1.0)**
  - Ease of completing the process and amount of documentation rated similarly
  - However, Initial Widows rated the process significantly worse
- **Award Letter also scores well - 87 - and has moderate impact (0.8)**
  - Time to receive letter and ease of understanding letter similar scoring
  - As with Application Process, Initial Widows rate Award Letters significantly lower
    - ✓ *Time to receive letter is rated 12 points lower*



# Summary of ACSI Findings



- **Telephone is most used and preferred method of contact**

- Any movement to web must be done carefully
- Significant number of customers do not wish to use the web



- **Initial Widows are less Satisfied with the Survivor Benefits than are Spouse to Widows**

- Opportunity for improvement lies with this segment



# ACSI Recommendations

- **Maintain high levels of customer service**
  - Telephone/personal interaction critical for this group
  - Movement to web or email must be done with caution; a slip in perceptions of Customer Service will result in a drop in overall Satisfaction
- **Initial Widows represent greatest opportunity for RRB to improve its Satisfaction score**
  - Make sure representatives clearly communicate application process requirements and set expectations regarding receipt of award letter
  - Make sure publications clearly communicate



# ACSI Recommendations

- **Ease the transition to online technology**

- Use publications or award letter to communicate the type of information which can be found on the website or highlight the ability to email RRB for a quicker response time
- Make sure ‘live’ backup is there every step of the way to help those customers who attempt self-service



# What's Our Secret?



And can you get these kinds of scores too?

# What's Our Secret?

- **Clear Mission**
- **Focus on Customer Service**
- **Customer Choice**
- **Continual Striving to Improve**

# About the RRB – Our Mission

- administer **retirement**, **survivor** and **unemployment** and **sickness** insurance benefit programs
- administer aspects of the **Medicare** program
- administrative responsibilities under the **Social Security Act** and the **Internal Revenue Code**.

# About the RRB

In carrying out our mission, we will:

- pay benefits to the **right people**, in the **right amounts**, in a **timely manner**
- safeguard our **customers' trust fund**
- treat **every person** who comes into contact with the agency with **courtesy** and **concern**



# About the RRB

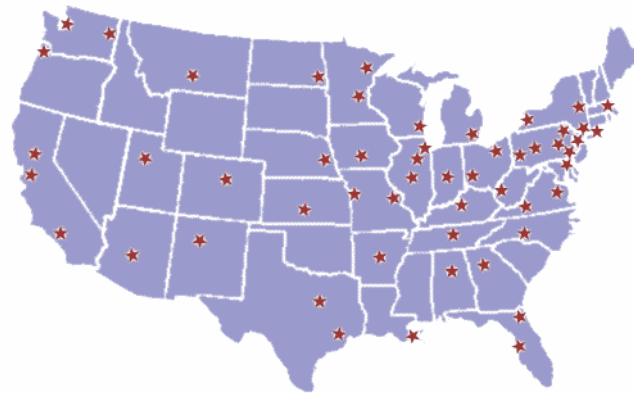
- Independent agency headquartered in **Chicago**
- **Over \$9 billion** to **over 600,000** retirement-survivor beneficiaries
- **\$83 million** to about **32,000** unemployment-sickness claimants

# About the RRB

- Unique Structure -- **3 Board Members** representing the different segments of our stakeholders
- Culture that has **always** emphasized customer service
- Traditionally staff has enjoyed close **personal, lifelong contact** with our customers

# Service Delivery – Local Presence

**53** Field Offices in **3** Regions around the country



# Characteristics of RRB Customer Service

- Highly experienced staff
- Developing and Sustaining Relationships with customers and stakeholder groups
- Judicious use of technology
- Customer Choice

# Lifelong Contact

*“...I retired from the UP railroad in February 2005 and my wife has just retired as a homemaker this October. I want to thank your staff that made the transition from a working locomotive engineer and a homemaker and wife to a retired couple, as painless as possible. Your staff was very professional, and so helpful with this process. I just wanted to let you know how much I appreciated their help.” -- December 2005*

# Strategic Considerations

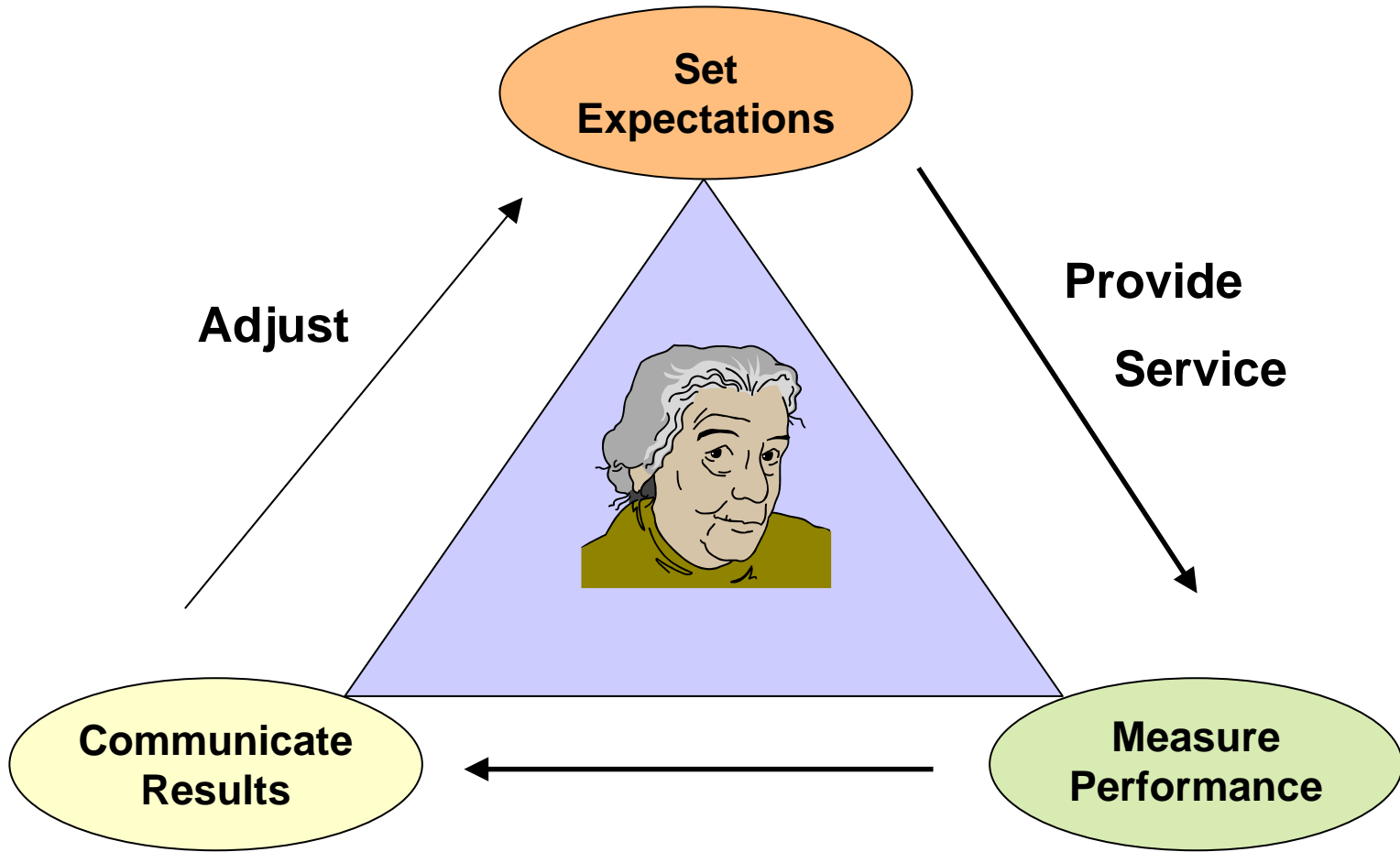


## Objective –

Provide Excellent  
Customer Service

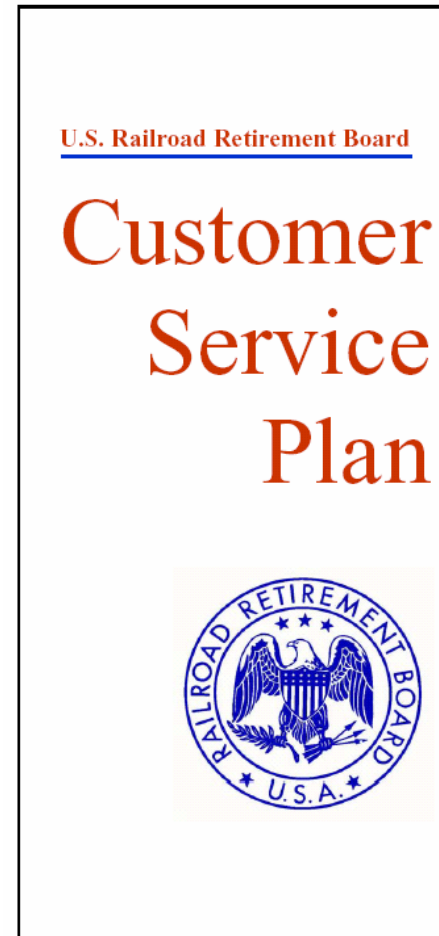
- Challenge -- How do we continue to operate effectively in a downsized environment while still providing exceptional service?

# Customer Service



# Setting Expectations

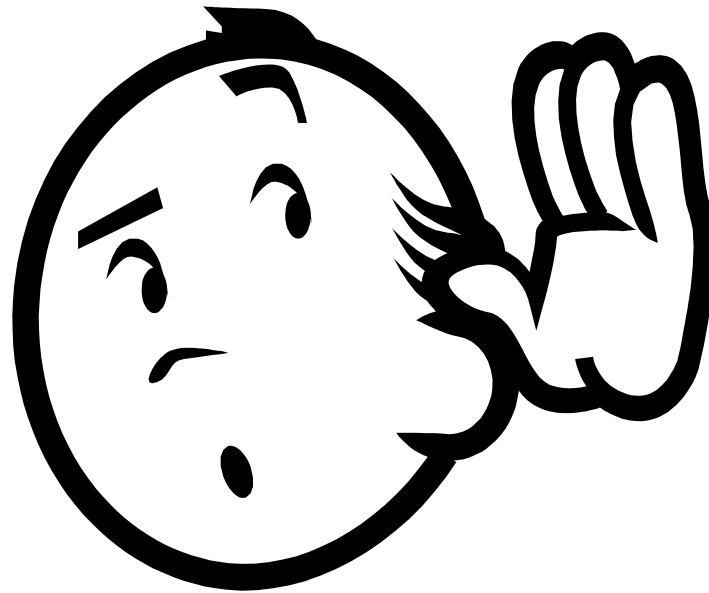
- Customer Service Plan
- Performance Plan





# Measure Performance

Listening to Customer Feedback

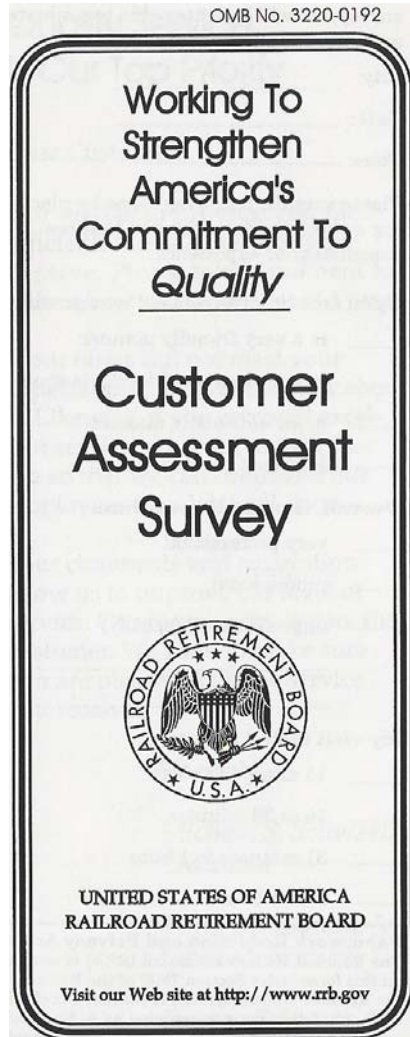


# Measure Performance

We capture customer feedback on service using a variety of means.

- Point of contact surveys
- Meetings with stakeholders
- Web site feedback (Contact Us)
- ACSI surveys

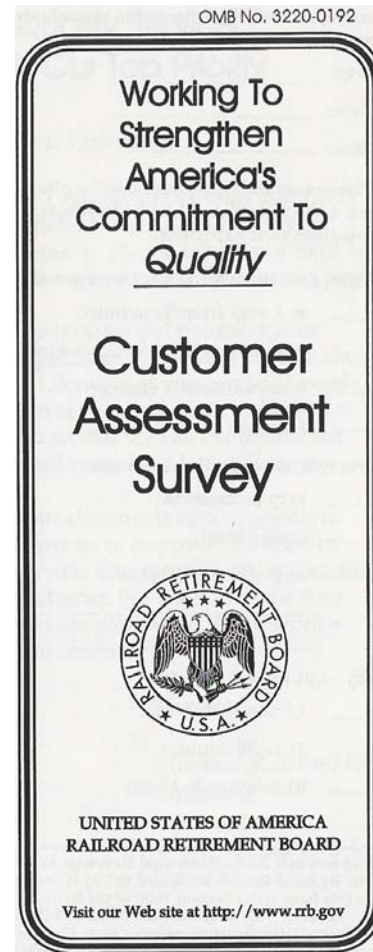
# Point of Contact Surveys



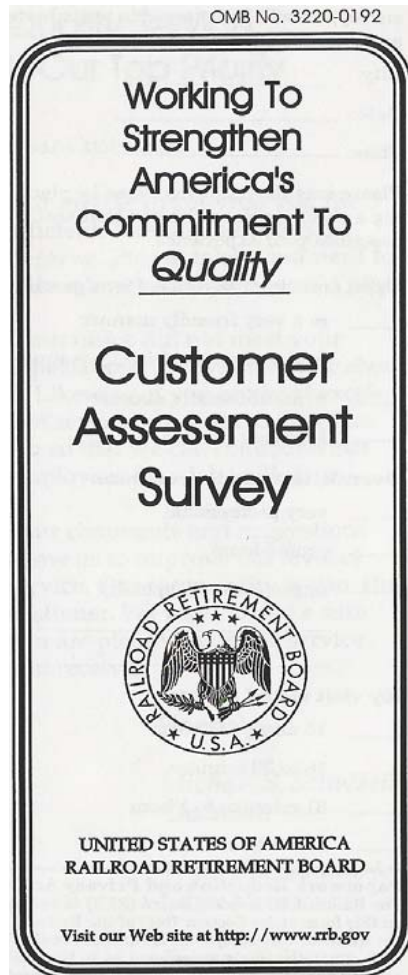
- Measures satisfaction with in-person service
- On-going indicator of satisfaction between ACSI efforts
- Available in all field offices

# Point of Contact Surveys: Some Examples

- "...(they) perform the job the way it should be done, but better- they care."
- "...very friendly... she even answered questions I never even thought to ask. KEEP IT UP!"



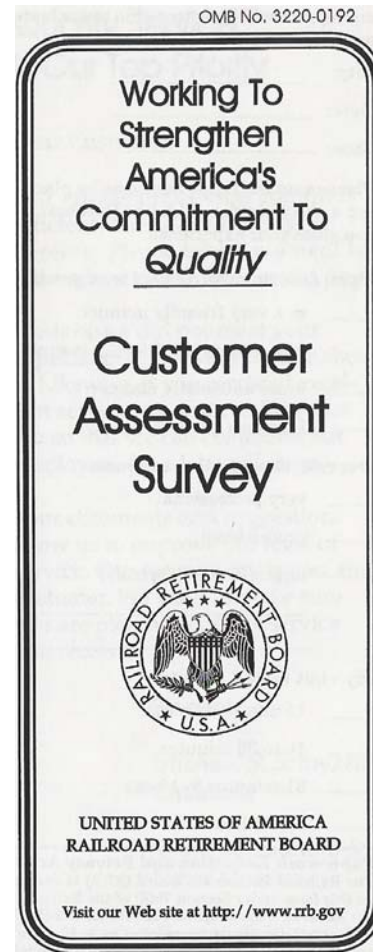
# Point of Contact Surveys: Some Examples



- “...Is there a way that you can improve the language of the Retirement and Survivors Benefits booklet? The explanation of tier 1 and tier 2 concepts in it was confusing.”

# Point of Contact Surveys: Some Examples

- “ ...Jane has helped me since 2001 when I was injured and unable to return to work. After 37 years of employment it was a very traumatic time for myself and my wife. She was there for us and kept us posted as to time lines and helping get all our need paperwork in order.”



# Point of Contact Surveys – What Do We Find

- Overall Quality – over **99%** favorable
- RRB staff – over **98%** felt staff highly professional
- Desired Service Received? – Yes, over **97%**
- Greeting/Treatment – over **94%** treated in friendly/very friendly manner

# Meetings with Customer Groups

- 366 Meetings with customer groups
- Nearly 18,000 attended





# Meetings with Customer Groups

- Meetings with groups from as rail unions and employers.
- Meetings with Retiree Groups
- Events such as breakfast meetings, picnics, etc.



# Contact Us

RRB: Send Feedback About This Web Site - Microsoft Internet Explorer provided by U.S. Railroad Retirement Board

Address <http://www.rrb.gov/feedback.htm>

HOME NEWS ABOUT LINKS CONTACT SEARCH MAINLINE

United States of America  
**RRB**  
Railroad Retirement Board  
STANDARDS - OPENNESS -  
ACCESSIBILITY - ACCOUNTABILITY

Send Feedback About This Web Site

NOTE: Do not use this form for questions about [eligibility or payment](#) of benefits | Read [this](#) before you send e-mail

Enter Your Feedback	Contact Information (Optional)
Type of Comment - Select one: <input type="radio"/> Complaint <input type="radio"/> Problem <input checked="" type="radio"/> Suggestion <input type="radio"/> Praise <input type="radio"/> Accessibility	Name <input type="text"/>
Message: <input type="text"/>	E-mail <input type="text"/>
	Phone <input type="text"/>
	FAX <input type="text"/>

[http://www.rrb.gov/opa/agency\\_overview.asp](http://www.rrb.gov/opa/agency_overview.asp)

Microsoft Internet Explorer

Help

Search Favorites Media

ailink.asp

**Genealogical Information**  
We have a page just for people researching their [family history](#).

**Customer Service Comments**  
Customer service comments may be directed to [cleyser@rrb.gov](mailto:cleyser@rrb.gov).

**Waste, Fraud or Abuse**  
See the Office of [Inspector General Hotline](#) Web Page for instructions on how to report possible fraud or abuse.

**Non-discrimination on the Basis of Disability or Accessibility**  
This is where to direct your questions regarding [compliance with Sections 501, 504 and 508](#) of the Rehabilitation Act of 1973, as amended.

**Procurement**  
Direct questions about doing business at the Railroad Retirement Board to [Karen Bental](#)

**Feedback**  
Complete our [comment form](#) to send feedback to the Web Manager about our website.

Internet

# ACSI

The ACSI is a standardized measure of customer satisfaction

Latest RRB segment – survivor applicants

Next?



# ASCI

## Epilogue Questions

Used to gauge customer preferences for service delivery over time for each segment

- Extent service options are valued
- Most recent mode of contact
- Choice for conducting future business



# Measure Performance

## Objective Measures

**Need  
Improvement**



**Accurate and  
Timely Service**

# Measure Performance

We developed a number of objective measures of our performance.

- Timeliness of Service
- Accuracy of Benefit Payments

# Communicating Results



# Communicating Results

## ➤ Posters

## ➤ Press Releases

## ➤ Web FAQs

### RRB CUSTOMER SERVICE PLAN

#### Fiscal Year 2004 Progress Report



This chart shows the U.S. Railroad Retirement Board's performance in key areas of its Customer Service Plan, and goals for the percentage of customers expected to receive service in the time frames specified in the plan during fiscal year 2004. The goals are revised annually based on such factors as projected workloads and available resources.

In addition to the figures below, it should be noted that the RRB recently developed an index to measure the overall timeliness of its customer service in handling retirement applications; survivor applications; disability applications and payments; and railroad unemployment and sickness benefit applications and claims. During fiscal year 2004, **overall benefit timeliness** was 98.5 percent. This means that the RRB's customers received benefit services within the time frames promised in the plan 98.5 percent of the time.

#### STANDARD

- If you filed an application for unemployment or sickness insurance benefits, you will receive a claim form, or a decision, within 15 days of the date you filed your application.  
*Goal: 98 percent.*
- If you filed a claim for subsequent biweekly unemployment or sickness insurance benefits, you will receive your payment, or a decision, within 15 days of the date we receive your claim form.  
*Goal: 99 percent.*
- If you filed for a railroad retirement employee or spouse annuity in advance, you will receive your first payment, or a decision, within 35 days of the beginning date of your annuity. If you have not filed in advance, you will receive your first payment, or a decision, within 65 days of the date you filed your application.  
*Goals: 93 percent (filing in advance), 95 percent (not filing in advance).*
- If you filed for a railroad retirement survivor annuity or lump-sum benefits, you will receive your first payment, or a decision, within 65 days of the date you filed your application, or became entitled to benefits, if later. If you are already receiving a spouse annuity, you will receive your first payment, or a decision, within 35 days of the date we receive notice of the employee's death.  
*Goals: 80 percent (initial survivor applicants), 93.5 percent (lump-sum applicants), 89 percent (survivor applicants already receiving spouse benefits).*
- If you filed for a railroad retirement disability annuity, you will receive a decision within 105 days of the date you filed your application. If you are entitled to disability benefits, you will receive your first payment within 25 days of the date of our decision, or earliest possible payment date, whichever is later. *Goals: 65 percent (disability decisions), 93.5 percent (disability payments).*
- When you inquire with us by letter, you will receive a reply within 15 days of the date we receive your inquiry. If for any reason we cannot reply within that time frame, we will

#### PERFORMANCE

- During fiscal year 2004, 99.25 percent of unemployment benefit applications sampled for timeliness and 99.4 percent of sickness benefit applications processed met the standard. Average processing times for unemployment and sickness benefit applications were 1.37 and 1.55 days, respectively.
- 99.7 percent of subsequent claims processed for unemployment and sickness benefits met the standard for fiscal year 2004. Payments are issued within 2 business days of processing. The average processing time for claims was 3.86 days.
- Of the cases processed during fiscal year 2004, 92.4 percent of employee and 96.3 percent of spouse applicants who filed in advance received a payment, or a decision, within 35 days of their annuity beginning date. Average processing times for employee and spouse applications were 10.7 and 6.6 days, respectively. Also, of the cases processed, 98.6 percent of employee and 96.2 percent of spouse applicants who had not filed in advance received a payment, or a decision, within 65 days of their filing dates. In these cases, the average processing times for employee and spouse applications were 21.8 and 19.9 days, respectively.
- Of the cases processed during fiscal year 2004, 84.5 percent of the applicants for an initial survivor annuity received a payment or a decision within 65 days. In addition, 95.4 percent of the applicants for a lump-sum benefit received a payment or a decision within 65 days. In cases where the survivor was already receiving a spouse annuity, 94.1 percent of the applicants received a payment or a decision within 35 days of the RRB being notified of the employee's death. Average processing times for all recurring and lump-sum applications were 26 and 12 days, respectively.
- Of the cases processed during fiscal year 2004, 55.9 percent of those filing for a railroad retirement disability annuity received a decision within 105 days of the date they filed an application. The average processing time was 110.2 days. Of those entitled to disability benefits, 94.8 percent received their first payment within the plan time frame. Average processing time was 7.7 days.
- In fiscal year 2004, 99.3 percent of all correspondence the RRB received was responded to, either with an acknowledgment or with a final response, within the



# Composite Timeliness Index

## Overall Timeliness Index

( Actual / Target )  
305,300

Tot. CS Items Handled

Overall Timeliness  
**98.61** / 98.7

## Benefit Level Indices

( Actual / Target )

CS Items at Benefit Level

Retirement Apps  
**94.31** / 92.6

18,324

Survivor Apps  
**94.61** / 98.6

16,543

Disability Apps/Pymts  
**81.51** / 77.8

8,327

RUIA Apps and Claims  
**99.81** / 97.8

261,506

## Individual Customer Service Workload Performance

( Rand Vol. )

CS Items handled at Individual Level Shows under workload

**Advance**  
93.1

13,031

**Not Adv.**  
97.3

5,293

**Initial**  
89.4

2,342

**Conversion**  
s

8,693

**Death Benefits**  
96.3

5,508

**Decisions**  
67.9

4,359

**Payments**  
94.4

4,568

**UI Apps**  
99.8

7,660

**SI Apps**  
99.6

19,354

**UI/SI Claims**  
99.8

234,492

# Communicating Results

- Communicate performance to front line
  - One tool to use in setting expectations for / with customers
  - Team forming to look at more effective ways of doing that
- Actual performance a factor in setting Performance Report targets for each fiscal year

# What are the results of all of this?

Delighted customers  
as reflected by our  
high ACSI scores

&

Continued support  
for our agency



# Questions?

