



**National Council on Teacher Retirement**  
**Customer Service Network Workshop**

Co-hosted by Minnesota Teachers Retirement Association

**June 11–13, 2017**

*Location of Workshop: Minnesota TRA, 60 Empire Drive, Suite 400, St. Paul, MN 55103*

*Hotel: The Saint Paul Hotel, 350 Market Street, St. Paul, MN 55102 (651) 292-9292*

**Meet in Hotel Lobby for workshop and dinner departures**

**AGENDA**

**Sunday, June 11**

6:30 pm Welcome Reception and Dinner at hotel

**Monday, June 12**

8:00 am Breakfast on your own at hotel

9:00 Shuttles depart for Minnesota TRA

**9:15 Welcome from the National Council on Teacher Retirement**

*Meredith Williams, Executive Director, NCTR*

*Robyn Wheeler, Assistant Executive Director, NCTR*

**9:20 Welcome to Minnesota TRA**

*Laurie Hacking, Executive Director, Minnesota TRA*

*Jay Stoffel, Dep. Exec. Dir., Minnesota TRA; NCTR Immediate Past-President*

**9:30 Introductions and General Roundtable Discussion**

10:30–10:45 Break

**10:45 Resume Roundtable Discussion**

**11:30 Tour of Minnesota TRA**

12:30 pm Group Lunch

**1:30 Web Self-Service Tools**

*John Cardillo, Manager of Public Information, NYSTRS*

2:30–2:45 Break

**2:45 Roundtable Discussion: Membership Information**

*Best practices for maintaining and leveraging key member data elements.*

**3:45 Monday Wrap-Up.**

4:00 Shuttle back to hotel.

6:00 Meet in lobby to shuttle to dinner





National Council on Teacher Retirement

## Customer Service Network Workshop

Co-hosted by Minnesota Teachers Retirement Association

**June 11–13, 2017**

*Location of Workshop: Minnesota TRA, 60 Empire Drive, Suite 400, St. Paul, MN 55103*

*Hotel: The Saint Paul Hotel, 350 Market Street, St. Paul, MN 55102 (651) 292-9292*

**Meet in Hotel Lobby for workshop and dinner departures**

### AGENDA

#### AGENDA, PAGE 2

#### Tuesday, June 13

- 8:30 am Breakfast on your own at hotel
- 9:30 Shuttles depart for Minnesota TRA
- 10:00 Performance Indicators to Measure Customer Service**  
*KPIs, SMART Goals, scorecards/dashboards, ASA, and more!*  
*Presentation by ForeSee*
- 11:00 Roundtable Discussion: “Customer Service” Benchmarking**
- Noon Group Lunch
- 1:00 pm Roundtable Discussion: Internal Customer Service**  
*How your work culture supports exceptional customer service (cross-function teams, technology in work processes, internal communication, and education best practices).*
- 2:00 Roundtable Discussion: Employee-of-the-Month and Beyond**  
*A discussion of innovative approaches to recognizing great performing employees and customer service.*
- 3:00–3:15 Break
- 3:15 Financial Education for Your Members**  
*Susan Wood, Director of Communications, PSRS/PEERS of Missouri*
- 4:15 Workshop Wrap-Up**
- 4:30 Shuttle back to hotel
- 6:00 Meet in lobby for short walk to dinner

#### Wednesday, June 14

Departures

