



Benefits and Services Committee

Item number 3 – Open session

Subject: Customer Experience Update

Presenter(s): Kate LeBlanc / Jennifer Hall, Accenture

Item type: Information

Date and time: January 9, 2025 – 30 minutes

Attachment(s): None

PowerPoint presentation(s): CalSTRS CX Update

Item purpose

This item serves to update the Board on CalSTRS' Customer Experience (CX) initiative on the 2022-25 Strategic Plan to support our objective to lead innovation and manage change by enhancing the customer experience to improve engagement and reduce effort.

Executive summary

Teams across CalSTRS have been actively involved in a multi-phase project aimed at enhancing customer experience throughout the organization. This initiative is led by a core group of staff from the Retirement Readiness and Customer Service Divisions. Accomplishments from the first few phases are as follows:

Insight Gathering (March – May 2024):

- Established the CalSTRS CX vision
- Conducted member and employee interviews to understand current strengths and opportunities
- Assessed maturity of CalSTRS' CX channels and capabilities and benchmarked against other organizations

Insight Synthesis (May – November 2024):

- Developed CX profiles capturing valuable insights into customer goals, mindsets, questions, roadblocks, and tactics

- This tool focuses on identifying members' needs and the resources available to understand and complete key tasks at each career stage
- Created comprehensive journey maps for current and future states, focusing on early-career, mid-career, and near/newly retired members
 - These maps were driven by opportunities to enhance experiences for customers
- Held workshops with cross-functional leaders to identify, refine, and prioritize top CX opportunities
- Synthesized initial observations and recommendations

Insight Activation (November 2024 – February 2025):

This final phase outlines plans to activate collective findings and provide actionable recommendations:

- Quick-win opportunities
- Design and communications strategy
- CX Playbook for embedding CX throughout CalSTRS

These three final deliverables build on one another. They will enable CalSTRS to make meaningful improvements to CX in the short and medium term, and to activate against more challenging cultural, operational, and technological CX transformations over the long term.

Background

Since February 2024, CalSTRS staff have engaged with Accenture to elevate CX at CalSTRS to industry-leading practices. Building on the vision and principles set by executives and directors, initial phases involved a cross-functional stakeholder group of CalSTRS experts, members, and their beneficiaries who supported the evaluation and initial findings of CalSTRS' current state.

The final phase of the CX engagement will provide actionable steps to capitalize on opportunities and insights.

Strategic Plan linkage: [Goal 2, Objective C of the CalSTRS 2022-25 Strategic Plan](#): Enhance the customer experience to improve engagement and reduce effort.

Board Policy linkage: [Board Governance Manual](#)