Federal Retirement
Thrift Investment Board

ExPRESS

Expanding, **P**articipant, **R**etirement, **E**ngagement, **S**ervices & **S**olutions

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EXpanding
Participant
Retirement
Engagement
Services &
Solutions

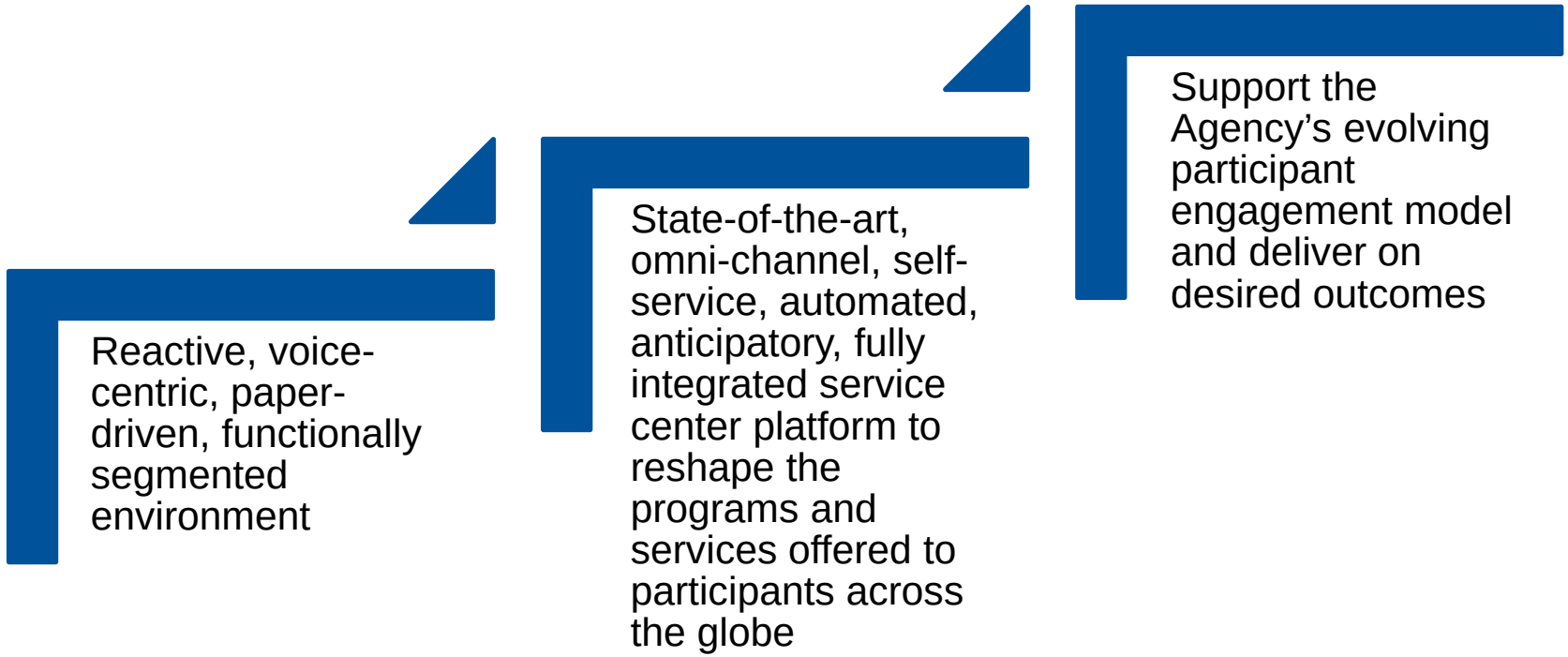
Strategic Objectives

Improve the participant experience by:

- Modernizing technology
- Additional channels of communication
- Providing self-service options
- Raising the TSP service delivery standards to those commensurate with contemporaries in financial services sector

Toward a Consolidated TSP Service Center

The Agency seeks to transform the purpose and capabilities of its current call centers, processing centers, and fragmented case management



ExPRESS Facilitates the Agency's Efforts to Improve Participant Retirement Outcomes by Enabling a Number of Key Initiatives

Participant Security & Trust

Expanded Participant Access

Availability, Uptime and Capacity

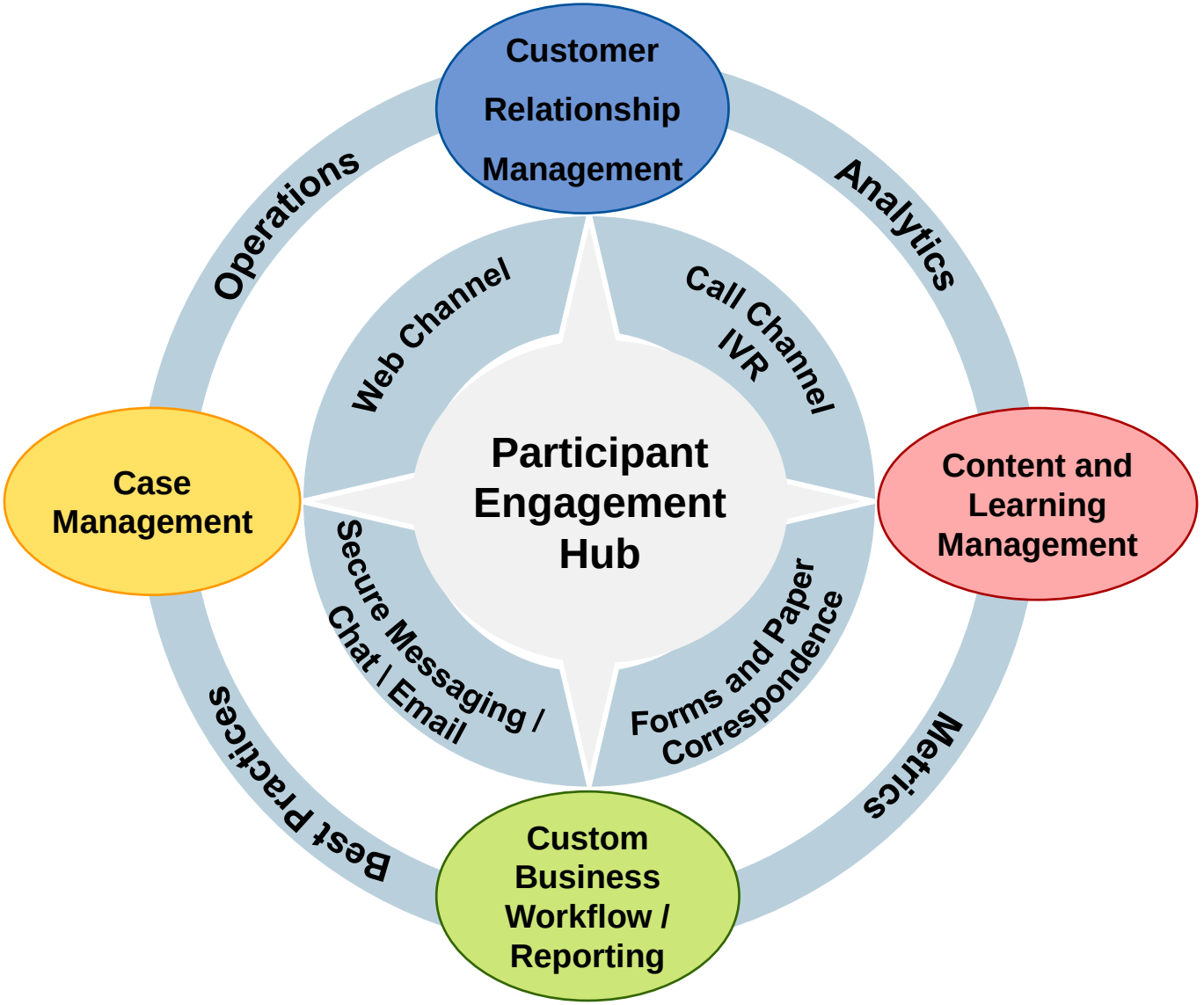
Improved Participant Retirement Outcomes

Process Efficiencies

Personalized Engagement

End-to-End View of Participant Interactions

Participant Engagement Hub (PEH)



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Expanding Participant Retirement Engagement Services and Solutions (**E*x*PRESS**)

The objective for the E*x*PRESS acquisition is to select a capable service provider that can:

Phase-In

- Flawlessly phase-in current TSP service capabilities to their own service center environment and seamlessly access FRTIB's recordkeeping systems
- "Do No Harm" – provide seamless continuity of service center operations

Steady State

- Achieve an initial "go-live" milestone into Steady State (Do no Harm)
- Mature the service center's operational capabilities designed around a Participant Engagement Hub (PEH) concept (platform innovation)

Transform

- Incorporate transformational requirements that expand PEH capabilities
- Deliver more flexibility, features, capabilities and services
- Build out services described in Now & Later

Questions?