

Office of Participant Services

PRESENTED BY
THE FEDERAL RETIREMENT THRIFT
INVESTMENT BOARD



Thrift Savings Plan

FEDERAL RETIREMENT THRIFT INVESTMENT BOARD

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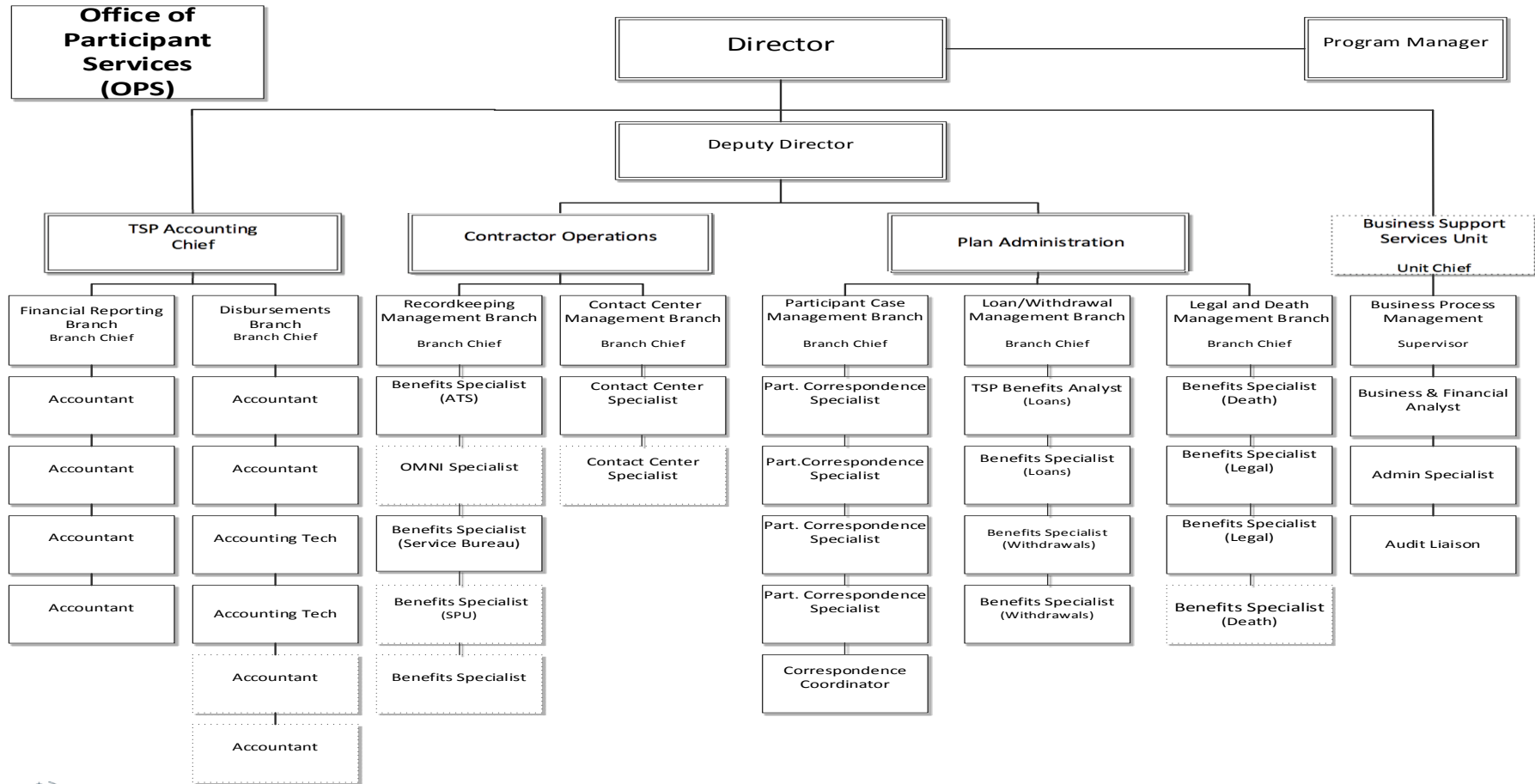


Office of Participant Services (OPS)

Mission Statement

The mission of the Office of Participant Services (OPS) is to provide premier customer service, ensure efficient and effective execution of daily operations and shape the policies, procedures, and processes that provide participants and beneficiaries with the tools and services they need to achieve a secure retirement with the best possible outcomes.

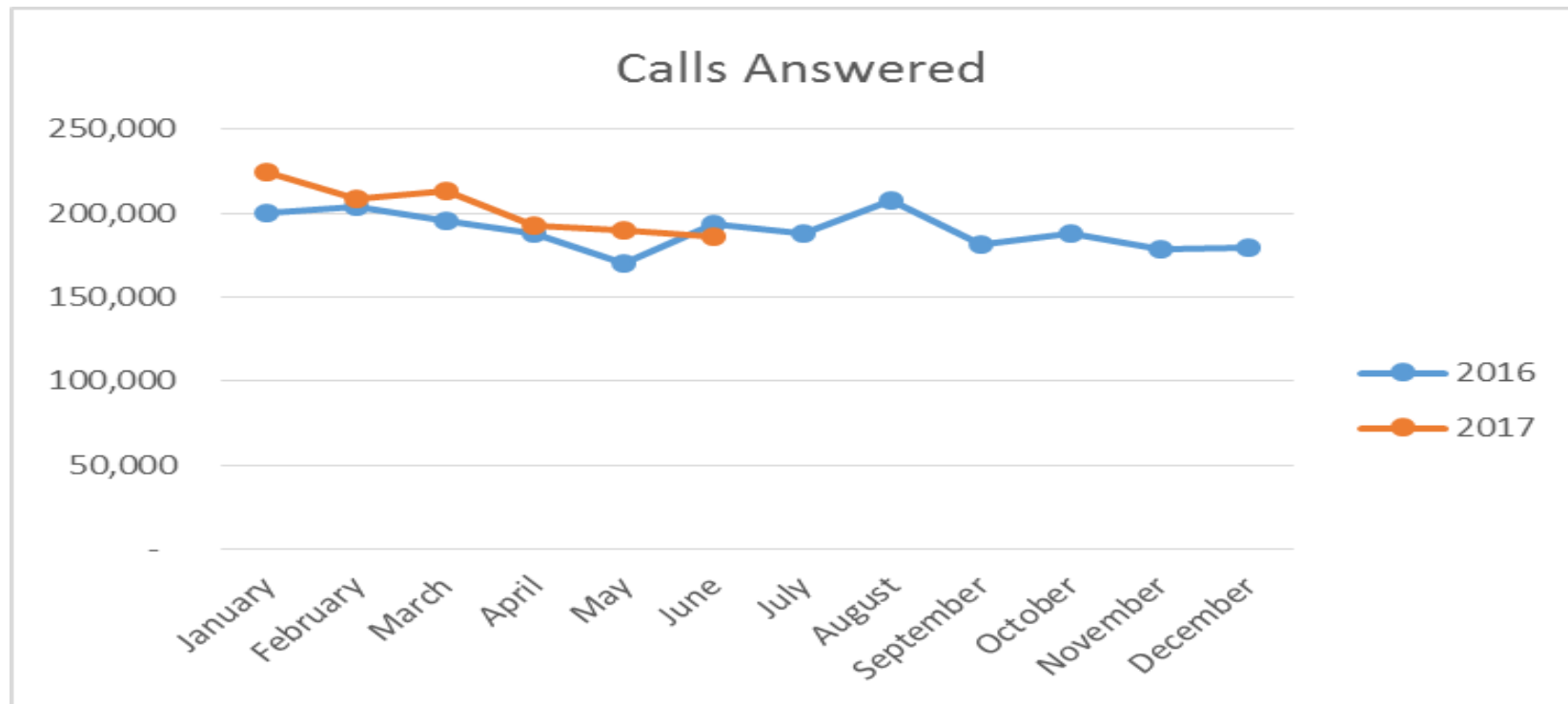
We talk to our participants, efficiently execute their requests, help solve their problems, and continually improve the TSP experience through service innovation.



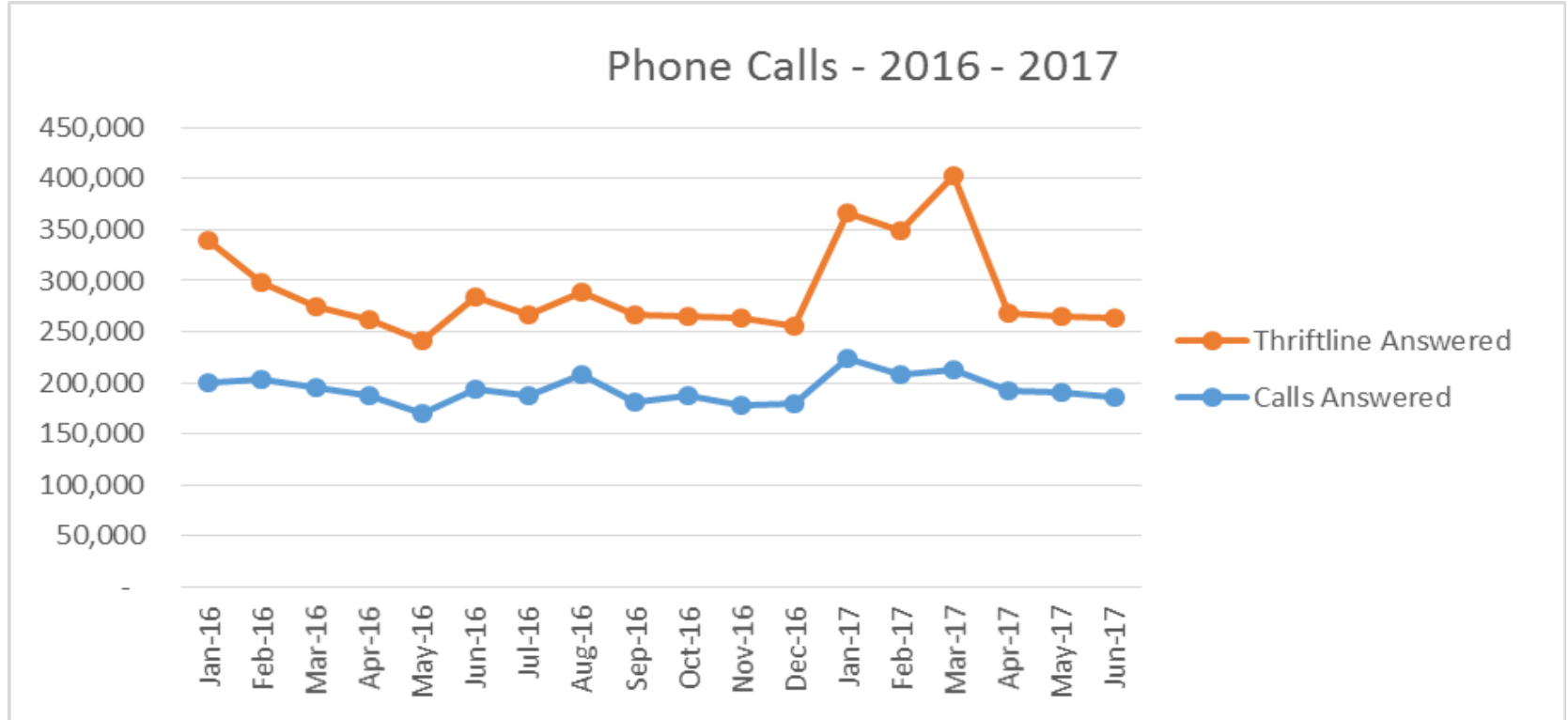
Contact Center

- Responsible for management and oversight of all inbound/outbound participant inquiries.
- 3 Major Services
 - Phone Calls
 - E-messages
 - Written Correspondence
- Volume
 - Phone Calls – 2.3m (2016) 1.3m (6/2017)
 - E-messages – 60k (2016) & 36k (6/2017)
 - Written Correspondence – 88k (2016) & 45k (6/2017)

Contact Center



Contact Center



Contact Center Management

- Quality Assurance
 - Calls / E-messages / Written Correspondence
 - Calibration
- Training
 - New Hire Training
 - Ongoing / Ad Hoc Training
- Reporting
 - Call Center Specific Metrics (AHT, ACW, etc.)
 - Participant Data (Inquiries, Tasks, etc.)

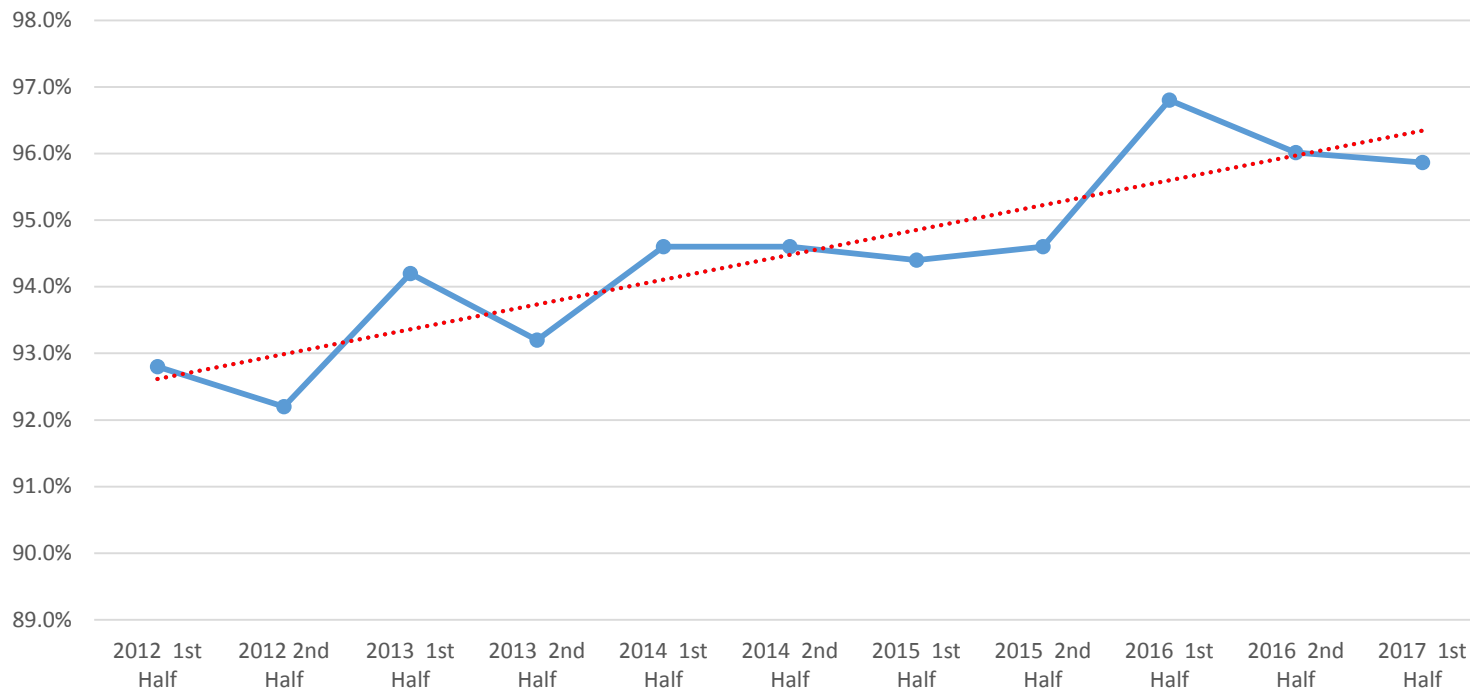
Contact Center Management

- Tiered Assistance
 - Each site has a Tier 2 for assistance
 - Assists achieving First Contact Resolution (FCR)
- Outbound Calls
 - Pilot for TSP-70 Withdrawal Form in 2015
 - TSP-21R Residential Loans in Sept. 2017
- Blended Retirement
 - Increased staffing will handle uptick in new participants
 - Use additional staff for new services during non-peak season

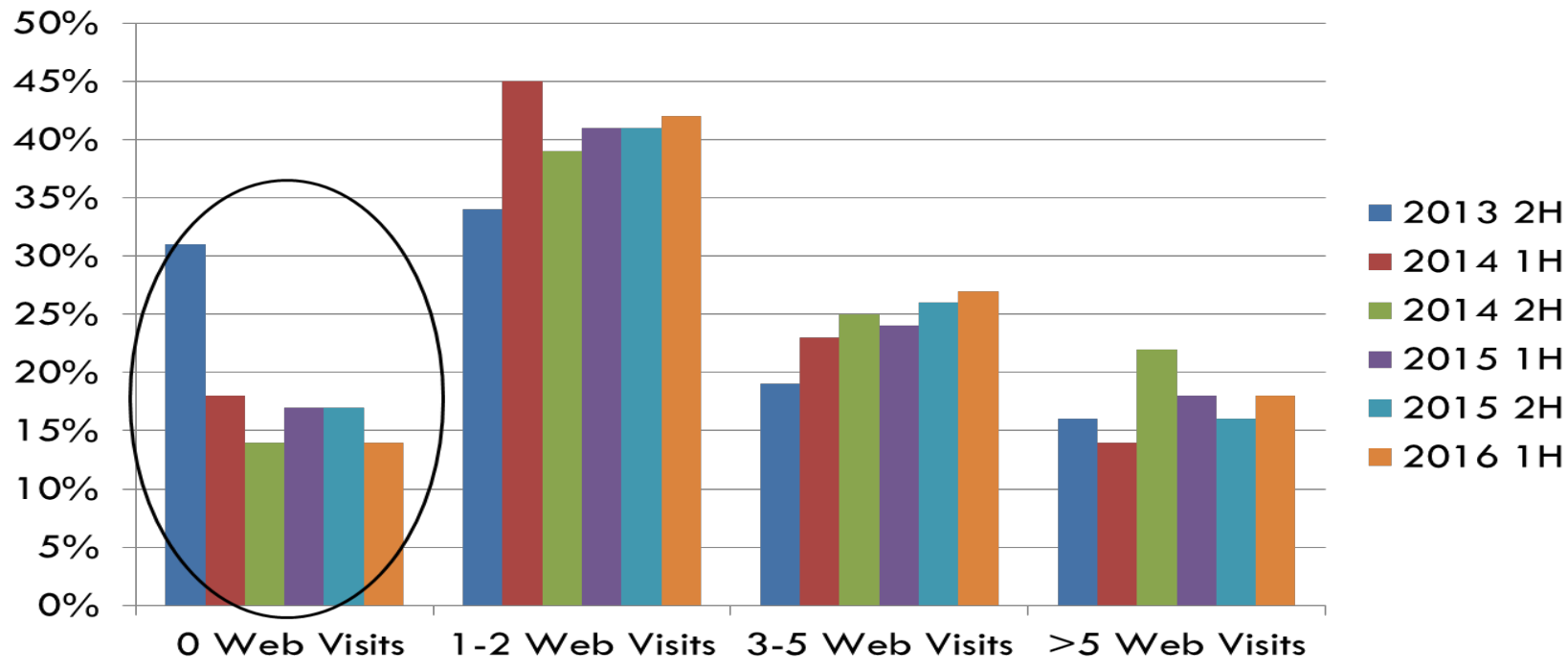
Contact Center Management

- Quality Assurance
 - 97% (2016)
 - 97% (2017)
- Customer Satisfaction Surveys
 - 97% (2016)
 - 97% (2017)

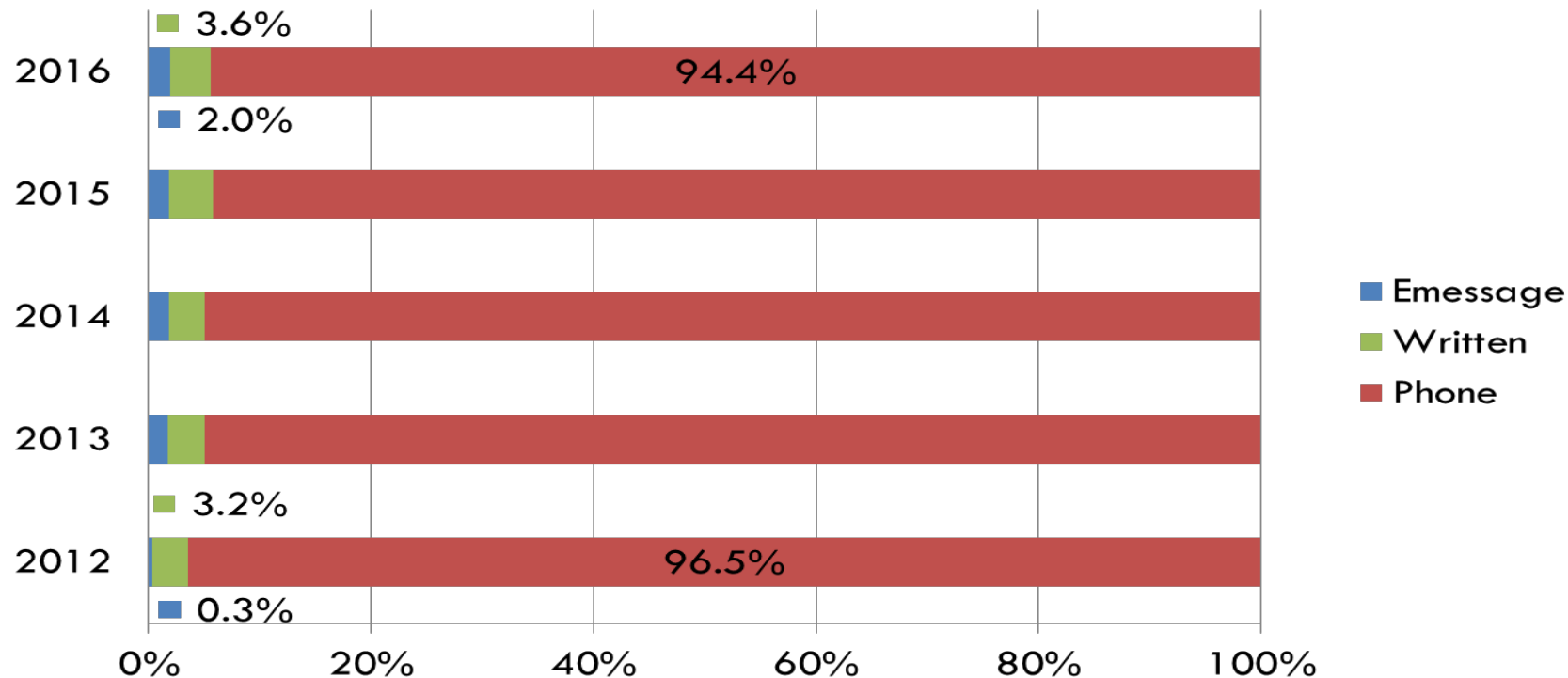
Call Center Satisfaction Survey



Web Visits prior to Call Center Contract



Participant Inquiry Mode



Participant Inquiries

2012 Top 5 Inquiry Reasons			2016 Top 5 Inquiry Reasons	
Post-Separation/MRD	588,187		Post-Separation/MRD	491,080
General Information	351,218		Account Maintenance	349,036
Loan Apps/Eligibility	314,282		General Information	264,757
In-Service Withdrawals	306,518		In-Service Withdrawals	184,012
Loan General Info	214,483		Loan General Info	167,374
2012 Total Inquiries	2,461,424		2016 Total Inquiries	2,376,373

Questions

