

## PBGC CUSTOMER SERVICE PLAN

PBGC guarantees the pension benefits of workers and retirees in covered defined benefit pension plans. The Corporation has built a strong culture of providing services to meet the needs of its customers. PBGC considers the customer in all related activities and decisions.

PBGC's key customers are:

- Workers, retirees and beneficiaries in pension plans
- Pension plan sponsors, administrators, premium filers and practitioners
- Visitors to PBGC's website

### ENGAGING CUSTOMERS

**Participants:** PBGC hosts meetings with representatives of the participant community to educate and solicit feedback. PBGC also actively engages participants using a dynamic corporate communications program that includes website transactions, newsletters, subscriptions and social media.

- **Promote Website Transactions:** PBGC.gov provides multiple resources for finding insured or trustee pension plans, as well as locating lost pensions. MyPBA (My Pension Benefit Account), PBGC's online transactional tool, lets customers handle routine transactions such as address changes, updates to tax withholdings, and direct deposit changes at any time of day or night.
- **Provide Newsletters and Subscriptions:** Retiree newsletters provide options on how to interact with PBGC and include topics such as tax information and identity protection. The newsletter for future retirees includes topics such as applying for benefits and requesting benefit estimates. An online subscription service allows interested parties to receive news releases and blog entries, as well as updated content on selected topics, such as the Health Coverage Tax Credit.
- **Use Social Media:** PBGC has an active presence on social media, sharing both PBGC-specific news and stories of general interest to the retirement security community.

**Practitioners:** PBGC actively engages practitioners in a number of ways including regular communication, an online premium filing tool, a toll-free number and industry event participation.

- **Invite Participation:** Industry experts are invited to comment on PBGC proposals to make compliance simpler and easier.
- **Promote Frequent Communication:** PBGC communicates regularly with practitioners primarily via email and the website. The popular What's New for Practitioners feature alerts practitioners to changes in regulations, filing due dates and technical guidance. Monthly interest rates are posted online. Free email alerts are available for both features.
- **Provide an Online Premium Filing Tool:** My PAA (My Plan Administration Account) is PBGC's online premium filing tool. My PAA provides round-the-clock filing capability and access to plan information. PBGC's website also provides extensive information on premium filings and regulations.

- ***Participate in Industry Events:*** PBGC services to the practitioner community include participation in conferences provided by relevant professional organizations. PBGC regularly provides and solicits information at these events to help practitioners successfully comply with their responsibilities and to address PBGC-related questions. PBGC maintains a speakers bureau of experts willing and available to speak to interested groups.

***Website Visitors:*** PBGC actively engages visitors by providing the most frequently requested information and soliciting feedback.

- ***Provide Requested Resources Online:*** PBGC.gov provides extensive resources of interest to varied audiences including laws and regulations, listings of trustee and insured pension plans, phone numbers and email addresses, and the popular unclaimed pension search tool.
- ***Make Regular Improvements:*** PBGC.gov incorporates customer feedback and web analytics information into improvements to site content, navigation and design. The site is redesigned as needed to keep up with customers' changing needs and expectations.

## TALKING WITH CUSTOMERS

PBGC operates customer contact centers to provide individual attention and experienced assistance. PBGC's problem resolution officers help customers resolve complex problems.

- ***Operate Customer Contact Centers:*** During business hours, PBGC's toll-free customer contact centers handle participant and practitioner inquiries in both English and Spanish. To accommodate high-volume periods, expanded hours are periodically offered.
- ***Dedicate Problem Resolution Officers:*** PBGC has long employed two dedicated problem resolution officers. Each officer is assigned to a customer group of participants or practitioners to resolve individual questions and concerns.

## LISTENING TO CUSTOMERS

PBGC actively listens to its customers, hears their concerns and ideas, and maintains accountability for providing customers with the highest level of service.

- ***Listen to Participants:*** PBGC uses three surveys to invite feedback from monthly payees, users of MyPBA and participants who call its toll-free number. All three surveys provide a "please contact me" option so that PBGC can respond to individual questions and concerns. PBGC further ensures the quality of service provided to its customers by monitoring calls and following up with a sample of customers to ensure their concerns were handled promptly, courteously and correctly.
- ***Listen to Practitioners:*** PBGC listens and seeks to build on its successes with ever-improving service. PBGC hosts forums to air practitioners' varying perspectives on PBGC regulations and policies, and solicits feedback via surveys of premium filers and users of My PAA. The Office of the General Counsel also staffs a general inquiry line to field legal questions from practitioners.
- ***Listen to Website Visitors:*** PBGC works to improve the visitor experience by asking customers to evaluate their experience and provide comments using the Customer Satisfaction and PBGC.gov

surveys. PBGC uses the feedback from these surveys to identify customer needs and improve programs and services.

## BENCHMARKING PERFORMANCE

Customer service is intrinsic to PBGC's mission. PBGC sets targets, measures performance and compares results to the best in the private sector and government, then uses this information to reinforce its commitment.

- **Set Targets:** PBGC maintains [service targets](#) for customer groups and regularly reports on [performance](#) against goals. Customer satisfaction scores reflect the success of PBGC's efforts to serve both the people who count on the Corporation, and the companies and professionals that sponsor and administer ongoing pension plans.
- **Compare PBGC Service to the Best:** PBGC uses the objective third-party American Customer Satisfaction Index and ForeSee Customer Experience Analytics survey methodologies to compare its performance to the services provided by both government and private entities. Feedback from the surveys is used to allocate resources and to make informed decisions and improvements that matter to customers.
- **Reinforce PBGC's Commitment:** Supervisors evaluate all employees against a customer service performance standard. PBGC employees are kept aware of customer needs, wants and perceptions. PBGC routinely performs the following to promote awareness:
  - Post customer survey data daily on the internal website for all employees to view
  - Train customer service representatives and conduct quality reviews of customer calls
  - Review policies and regulations to assure ease of use by customers
  - Use customer and employee suggestions to improve service
  - Highlight customer feedback and satisfaction levels in quarterly and annual performance reports

## PLANNING FOR THE FUTURE

PBGC will continue providing outstanding customer service. Initiatives underway will:

- **Reduce** the time it takes to notify participants of their final benefit
- **Add** frequently requested functions to MyPBA, the online self-service tool for participants and retirees
- **Simplify** navigation and search features of PBGC.gov so customers can quickly get to the information they need
- **Reunite** plan participants with their lost pensions

PBGC will continue to listen to its customers in order to appropriately allocate resources and deliver outstanding customer service.