

How Chicago Teachers' Pension Fund (CTPF) Defined a New Customer Service Vision

Overview

Implementing a new Pension Administration System provides organizations a unique opportunity to redefine their customer journey and how they provide service to their members and employers. This is challenging because organizations must be intently focused on the internal impacts of the new system, while also struggling with the overall service vision for staff, leadership, and other stakeholders. Provaliant's Visioning Process assisted Chicago Teachers' Pension Fund (CTPF) in defining a new customer journey and clearly identifying future service goals through the development of customer-focused vision statements to serve as a guide through all phases of CTPF's Pension Administration System replacement project.

CTPF at a Glance

- Established in 1895 by the Illinois State Legislature
- Administers a multi-employer defined benefit public employee retirement fund
- Serves more than 90,000 members

The Approach

Provaliant's Visioning Process is built on over 20 years of experience assisting clients successfully deliver projects that provide meaningful change to the member and employer experience while improving supporting business processes and technology. As we work with your organization to define a new customer vision, we develop several customer stories that focus on:

Provaliant Visioning

Current Experience

Future Experience

How Do You Get There

Current Customer Experience – What is your customer's experience today? Often these experiences are a representation of existing organizational challenges with people, process and technology and are key drivers for your project and creating a better customer experience.

Future Customer Experience – What is your vision for your customer’s experience in the future? These desired experiences typically are the culmination of improvements with people, process and technology coming together to enhance and streamline your customer’s experience and should reflect your organization’s overall future customer service goals.

How Do You Get There – What areas specifically need to change? Describing the specific actions needed to transition from the current customer experience to the future customer experience is critical as you define project success criteria and monitor progress throughout your project.

As CTPF began the process, they identified several of their biggest challenges to delivering the highest quality of service to their members. Focusing on the impact of those challenges to key customer experiences like applying for retirement benefits and refunds, CTPF began developing their vision for the future customer experience.

Provaliant then helped CTPF create customer experience stories that described the challenges of the present experience for a member, followed by the redefined future experience for the same member. The final step in the process was describing how CTPF would get there by highlighting the necessary areas of change and how the project and new solution would deliver them.

The Benefits



Better Alignment on Future: Developed a unified vision for CTPF’s future customer experience by collaborating with leadership and key stakeholders.

Focus on Overall Project Vision: Helped CTPF staff, leadership, and other stakeholders better understand the overall project vision and benefits to their customers.

Defined Customer Experience: Provided clear customer experience goals and success criteria for CTPF’s project.

Inform All Project Phases: Providing guidance to all phases of CTPF’s project, informing requirements gathering, design, testing and Go Live transition.

Improved Service to Customers: Will provide the highest quality of service to CTPF members, retirees, and employers.

How can we help? Please contact us to discuss.

Jay Masci
jmasci@provaliant.com | 602.705.9607 | <https://provaliant.com>

