



## Case Study: Federal Retirement Thrift Investment Board

# ActiveGovernment Improves Productivity and Service for the Federal Retirement Thrift Investment Board

### Background

The Federal Retirement Thrift Investment Board is the federal government agency that administers the Thrift Savings Plan (TSP), a \$220 billion retirement savings plan — similar to a 401(k) — provided to nearly 4 million Federal employees. Prior to 2004, the FRTIB operated a New Orleans-based call center, staffed by federal employees, with no disaster recovery plan. To maintain continuity in the event of a crisis, the FRTIB decided to establish a parallel call center to handle calls in the event of service outage at the New Orleans center, and to support current operations by taking 50 percent of the call volume.

### Challenge

With no disaster recovery plan in place for its New Orleans call center, the FRTIB sought a call center service provider that could provide parallel operations and be transparent to its customers for all inquiries, procedures and processes. The parallel call center had to maintain the same high levels of customer service and professionalism provided by its in-house center. Additionally, the second call center needed to be located in an area with weather patterns different from its New Orleans site.

### Solution

The FRTIB selected InfoSpherix, now part of Active Network and operating as ActiveGovernment, to provide parallel call center operations. Within 15 weeks, ActiveGovernment had the call center up and running, developing an initial 5 week training program for 40 Participant Service Representatives (PSRs) to take calls from federal employees. ActiveGovernment had an existing call center facility in Cumberland, MD (a geographically preferable site away from the Louisiana Gulf Coast), and a staff already experienced with complex financial information management systems (by operating the U.S. Office of Personnel Management call center).

### Technology

ActiveGovernment built a web-based knowledgebase that PSRs could use to search by keywords or topics. The knowledgebase also includes a bulletin board feature that notifies PSRs of any new or updated critical information in a method similar to instant messaging. This feature allows supervisory staff and management to quickly convey any new information or alerts.

### Customer at a Glance

- ▶ Customer: Federal Retirement Thrift Investment Board (FRTIB)
- ▶ Solution: Managed Services
- ▶ URL: [www.frtib.gov](http://www.frtib.gov)

### Highlights

- ▶ Providing parallel call center operations to FRTIB since 2004
- ▶ Call center set up and running within 15 weeks of contract award
- ▶ 110 Participant Service Representatives
- ▶ Fielding more than 5.5 million calls and 94,000 monthly average
- ▶ In May of 2008, the parallel call center, as part of the FRTIB Call Center Program, earned the first call center site certification ever awarded by the International Customer Management Institute (ICMI).

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### Commendation from Call Center Customer

“Today, your employee, Marie O’Donnell, helped me with numerous questions. She was extremely nice, patient, and went out of her way to estimate figures I requested. Marie cleared up all the information that I found confusing. She did this quickly, and in a kind and understanding way, which eased my any anxiety and stress regarding this important decision. Having Marie help me was truly a wonderful customer service experience.”

— CL, Arlington, Texas

### People and Training

With Active’s experience operating OPM’s Retirement Information Office call center, the company had in place the experienced staff to cross-train for FRTIB’s needs. As a pre-eminent employer in the western Maryland area, Active also had the ability to hire additional staff in a short period of time. This proved key to being able to set up and implement the call center within 15 weeks.

Continuity was critical to provide seamless, transparent service for all inquiries, procedures and processes. The training requirements included a broad and deep knowledge of TSP processes, procedures and information as well as eligibility and contributions, investments, loans, in-service and post-service withdrawals, spousal rights, death benefits, beneficiaries, taxes, court orders, and more.

### Call Center Staffing

A Tier 2 service was initiated by Active to produce even greater efficiency in the call center. Previously when PSRs had questions, they had to wait until a supervisor or floor assistant physically came to them to answer their question. This was the method that was used in the New Orleans center. Active conducted a successful pilot program to include a few of the best PSRs and developed a tier 2 line in which they could call with questions. The “HelpLine” is currently staffed by 10 of the highest performers in the call center. These employees coach PSRs through some of the more complicated questions, take escalated calls, and document all questions and answers to the HelpLine.

### Results

After operating the call center for five years, ActiveGovernment now has more than 110 PSRs and has answered more than 5.5 million calls, with an average monthly call volume of 94,000. Experience is always valuable, and in this project it was instrumental in Active being able to set up the call center, train PSRs, and have everything up and running quickly. This experience has also allowed the team to exceed the FRTIB’s performance metrics, which included:

- ▶ Calls answered within 20 seconds: 90%
- ▶ Abandoned rate: < 2%
- ▶ Average talk time: 210–270 seconds
- ▶ After call work: 60–120 seconds
- ▶ Blocked calls: < 2%

Responsiveness has been cited as an additional benefit to partnering with ActiveGovernment. In 2004, when the New Orleans call center was closed due to Hurricane Ivan, Active immediately took on all calls, and continued to do so until New Orleans operations could be restored two days later. As 2005’s Hurricane Katrina threatened the Louisiana coast, Active’s Cumberland facility began taking 100 percent of the call volume, and continued to do so as the nation realized the devastating effects of Katrina. Active was able to quickly redirect cross-trained agents and hire additional agents to adequately staff the call center for the increase of inbound calls. Active handled 100 percent of call volume until an additional parallel call center began operation. Even when as the secondary parallel call center started, Active continued handling three-fifths of the call volume.