



Conference Forum—March 2022



Wespath

BENEFITS | INVESTMENTS

Survivor Benefits Update

Our goal is to establish
the survivor benefit process
as a core strength of
Customer Service with
our conferences, participants
and surviving spouses



2021 Initiative

- Learn what areas of the Survivor Benefits services are working/not working well
- Obtain viewpoints on areas of frustration
- Understand needs of the conference, participants and survivors



Conference Support

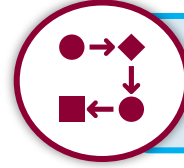
| | |
|------------------------|-------------------------------------------------------------------------------|
| Jana Collins | Benefits and Human Resources Manager, Mountain Sky Conference |
| Kathleen Lasky | Conference Benefits Officer / Director HR, Western Pennsylvania Conference |
| Derek McAleer | Director of Administrative Services, South Georgia Annual Conference |
| Eleanor Dickson | Asst. Director of Administrative Services, South Georgia Annual Conference |



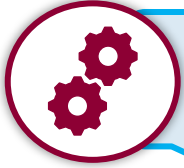
Key Themes We Heard



Accountability



Process improvement



Systems



Employee Training



Survivor support



Conference education



Team relationship

Next Steps

- Developed an action plan of 27 items
- Held ongoing meetings throughout 2021

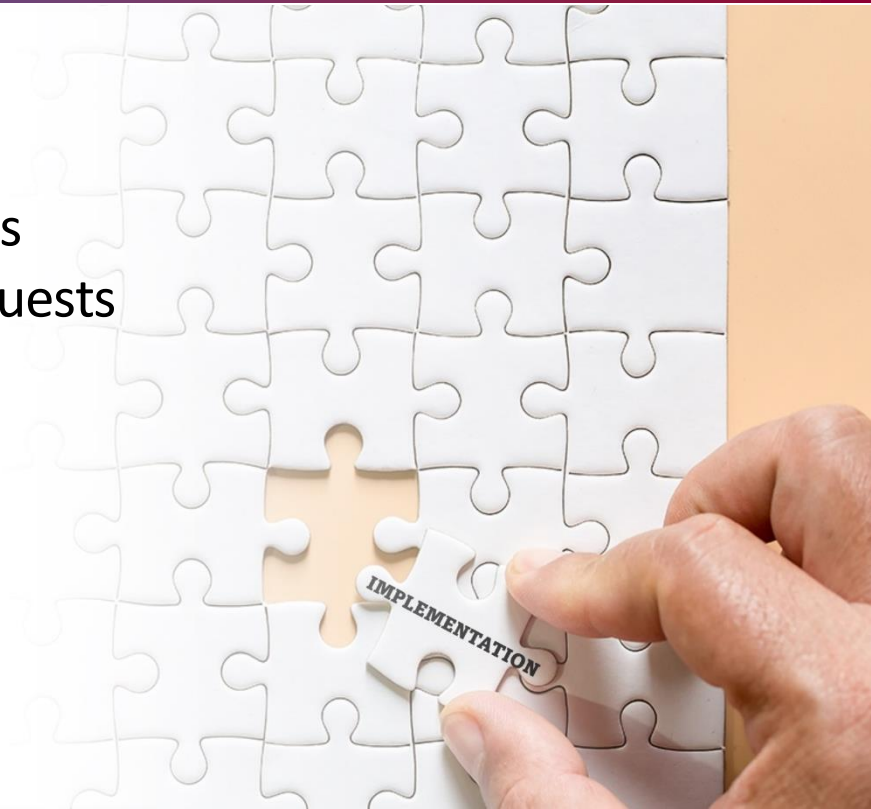
Action Plan

| Theme | Action Plan | Q3-21 | Q4-21 | Q1-22 | Q2-22 | TBD |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------|-------|-------|-----|
| Accountability | Ongoing empathy training, including reinforcement to not blame systems | X | | | | |
| | Reinforce using address provided on death notification form; confirm during quality check | X | | | | |
| | Implement process to immediately review emails with death notifications in order to respond to urgent requests before processing turnaround time | X | | | | |



Highlights of Implemented Items

- Empathy training for team
- Review emails with death notifications daily in order to respond to urgent requests
- Notify conference of delay in paying death benefit and reason in case they can assist
- Proactive call to surviving spouses to review retirement benefits



Upcoming Items

- **Complete of notification of death online** (timing TBD)
- **Telephony system changes**
 - Direct route for Plan Sponsors to Survivor Benefits team on IVR
 - Exploring direct extensions for specialists
- **Develop brochure for survivors**
 - Including information on Wespath benefits and processes
 - Other items to consider
- **New hire training to improve service levels**

Next Steps

- Feedback has helped identify improvements needed
- We remain focused on continuing improvements
- Contact your Client Relationship Manager
 - Additional feedback/ideas
 - Service concerns
- Introduction to the Survivor Benefits team



Questions





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