

Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR's website does not indicate CalHR support for the proposal.

A. GENERAL INFORMATION

1. Date

05/5/2017

2. Department

State Compensation Insurance Fund

3. Organizational Placement (Division/Branch/Office Name)

Public Affairs

4. CEA Position Title

Senior Vice President of Customer Experience

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)

The Senior Vice President of Customer Experience (SVP, CE) is responsible for establishing the customer service strategy to appropriately position State Fund in the market place. This includes creating, managing and optimizing exceptional customer experience for our insurance customers throughout the entire policy life cycle. The SVP, CE will set policy regarding the survey methods utilized for customer solicitation (i.e. phone surveys, internet, IVR, etc.), the frequency of those interactions, and the questions developed for that dialogue. The SVP, CE will map out the end-to-end customer experience, pinpoint deficiencies, and work with business functions to create the best experience in each area. This role will collect, analyze and disseminate information and data to monitor and track all customer interactions, using insights to continuously improve State Fund service and processes. The SVP, CE will drive cultural change and be a key influencer in setting policies that build, support and maintain a customer-centric environment.

6. Reports to: (Class Title/Level)

Executive Vice President, Public Affairs / CEA (C)

7. Relationship with Department Director (Select one)

- Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(Explain): Member of Public Affairs Strategic Leadership Team. Has responsibility to represent and advocate for customer experience and has frequent contact with the Executive Management Team on policy issues.

8. Organizational Level (Select one)

- 1st
- 2nd
- 3rd
- 4th
- 5th (mega departments only - 17,001+ allocated positions)

B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

This role will develop strategies, policies, procedures and a road map to implement and maintain a customer-centric culture at State Fund that delivers exceptional customer experiences throughout the life-cycle of a policy while ensuring State Fund continues to meet all regulatory and legal obligations governing workers' compensation policy and claims administration.

- Maintain a deep understanding of California small business and State Fund's customer segmentation and create and maintain customer loyalty through developing outstanding customer experience.
- Work with the State Fund executive management team to develop customer experience strategies, project scope's and determine priority of initiatives that align with enterprise goals and initiatives.
- Ensure State Fund has a robust Voice of the Customer practice that captures customer feedback through qualitative and quantitative surveys at critical points in the customer experience.
- Lead team members in conducting customer experience feedback analytics to identify opportunities for process simplification and improvement.
- Use Voice of the Customer feedback to identify opportunities and determine unmet needs of our various State Fund customer segments.

Conduct enterprise-wide analysis to identify and understand all customer touch points and communication. This includes detailed market segmentation analysis to understand the varying needs of each specific customer class.

- Work closely with all service teams to ensure their feedback is integrated into the effort to continually improve processes.
- Support other team members across the organization to communicate evolving industry business trends and customer needs.
- Identify and manage projects that improve the customer experience throughout the life-cycle of a policy.
- Monitor and track customer feedback and communicate solutions for improvement to the State Fund executive committee and the senior leadership management team.
- Provide customer insight and expertise needed in the development of our digital strategy, to identify and implement new ways of improving productivity and service
- Manage a high performing team of direct report(s) that contribute to a variety of complex and enterprise wide customer experience initiatives.

B. SUMMARY OF REQUEST (continued)

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- Program is directly related to department's primary mission and is critical to achieving the department's goals.
- Program is indirectly related to department's primary mission.
- Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: State Fund's vision is to become California's workers' compensation carrier of choice, centered on the values of honesty, integrity, accountability, adaptability and collaboration. Additionally, one of State Fund's enterprise strategies is to provide customer friendly, high quality, and efficient services that help California businesses improve workplace safety and reduce their overall cost of risk. This State Fund strategy supports State Fund's vision and will assist with achieving our purpose of providing fairly priced workers' compensation insurance, helping make workplaces safe, and restoring injured workers.

This role is at the center of this strategy by developing and delivering an experience that understands those needs and retains customers through initiatives, governance and effective change management.

B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

The insurance industry as a whole is investing heavily in improving customer experience to protect itself from disruptive market forces and meet its customers' needs in response to how other industries have impacted consumer expectations. Additionally, competition in California workers' compensation market has intensified., In order to maintain a competitive position in the market, State Fund must infuse a disciplined approach to customer experience into our operations - this includes strategy, process and technology improvements as well as overall customer service - in order to keep up with market demands.

C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

This position is responsible for overseeing all of State Fund's customer journeys for policyholders, brokers and injured workers. They will work with functional experts and leaders to design optimal omni-channel (technology; apps, phone; face to face, etc.) touchpoints in areas such as:

- Quoting
- Policy Issuance
- Billing
- Claims process
- Loss Prevention
- Call Center Operations

This role will have full oversight of all administrative and operational policies and procedures relating to how Customer Experience is implemented and managed state-wide.

Develop strategies to optimize State Fund's customer interaction in order to keep up with industry standards, market trends, allowing State Fund to gain more market share.

The position is responsible for determining when and how State Fund will collect Voice of the Customer data from its customers. It will oversee the collection, analysis and reporting of the data and making fact-based recommendations for optimizing State Fund's customer experience across all channels. Additionally, the position will have responsibility for monitoring and collecting insight on market developments related to customer experience.

C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position's scope and nature of decision-making authority?

The role will work collaboratively with colleagues across the organization, but specifically be responsible for designing the customer experience strategy across all the customer journeys. Implement policies around the Customer Experience program, which are highly visible. This will allow State Fund to manage our customers in such a way that they remain with us as their carrier of choice. This role is critical to ensuring that all the policies developed and implemented align with enterprise goals and strategies.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

Yes, this position will be establishing, implementing and maintaining new policies to ensure the success of this program. This position will utilize a variety of internal and external resources and conduct market assessments to recommend and strategize new and adopted policies. State Fund's operations are not completely analogous to other state agencies. Within our organization this role will be responsible for ensuring that our policies are drafted and carried out in a way that supports an optimized customer experience and is designed to support efficient operations. State Fund regularly works with the state legislature as an expert resource on policy issues related to workers' compensation insurance. Insights derived from our Voice of the Customer service research will likely prove valuable in helping inform lawmakers about workers' compensation law.