

Schwab Retirement Technologies® Call Center

With Schwab Retirement Technologies® (Schwab RT) Call Center, customer service representatives (CSR) across multiple call centers quickly and easily access current, comprehensive participant account information from a single entry point.

Call Center allows CSRs to maintain a high level of service by tracking all the details from the instant the call is answered, through the last task performed. Every participant contact is captured through a direct interface with the Recordkeeping database and all other access points, including Schwab RT Web and Voice. The result is a deeper understanding of the participant at any given moment, with every call.

Benefits

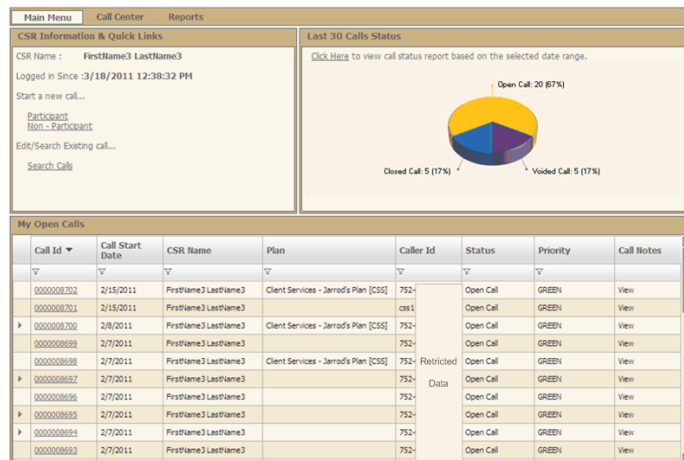
Elevate Quality of Customer Service—Schwab RT Call Center provides CSRs with relevant client information needed to answer questions and perform activities for the participant. From a simple interface, CSRs gain a deeper understanding of the participant at any given moment, with every incoming call.

Enable Consistent Messaging—CSRs have quick access to standardized scripting, ensuring consistent participant messaging.

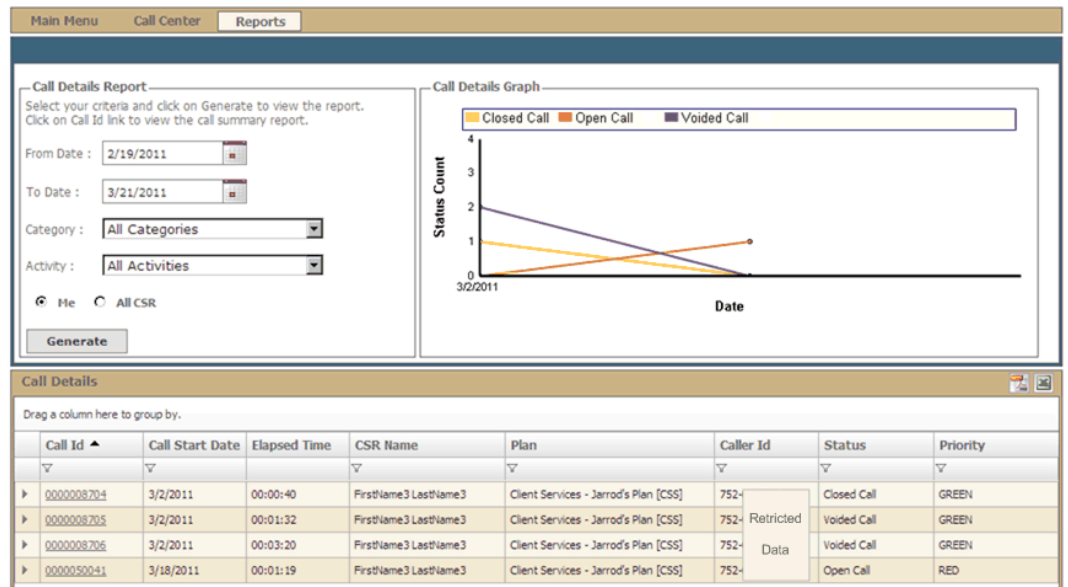
Improve Call Center Operations—Tracking participant activity allows call center supervisors to perform decision analysis, calculate customer satisfaction, and establish measures for continuous improvement.

Features

Intuitive Interface—Plan features that participants request most often are placed on an intuitive interface so that CSRs can effectively answer questions and perform activities for the participant. Those features include eligibility rules and vesting schedules, loan and distribution options, and transfer and election windows. CSRs can also obtain balance information, deferral rates, loan details, and transactional history, and common activity requests such as PIN changes, deferral and election changes and account re-balancing.



Detailed Activity Records—With access to the caller’s history, each CSR brings a deeper understanding of the customer to subsequent calls, and every CSR can offer help and status on pending requests. Supervisors may find data retrieval useful in analyzing trends and measuring the effectiveness of their customer support services.



Flexible Architecture—Multiple CSRs in different locations can access the Recordkeeping database. The Call Center desktop application installs and upgrades the system quickly, keeping CSRs in touch with customers anytime, anywhere.

Supervisory Control and Reports—A wealth of administrative options are available to help clients streamline operations. For example, multi-leveled user administration allows administrators to implement security settings for individual users, groups and supervisory users which means customer data is safe.

Contact Us

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