



CalSavers Retirement Savings Board Meeting

## Update on Outreach, Education & Customer Service

November 13, 2023

Jonathan Herrera,  
Director of Strategic Stakeholder Engagement and Customer Experience

CalSavers Retirement Savings Board



# Outreach and Customer Service Team Focus



## Virtual Education

- Continue best-in-class live webinar series
- Produce on-demand recorded webinars on different topics related to CalSavers

## Stakeholder Organizations

- Rebuild momentum with chambers, industry associations, non-profits who shifted focus
- Leverage existing communication networks and trusted messengers

## Customer Support

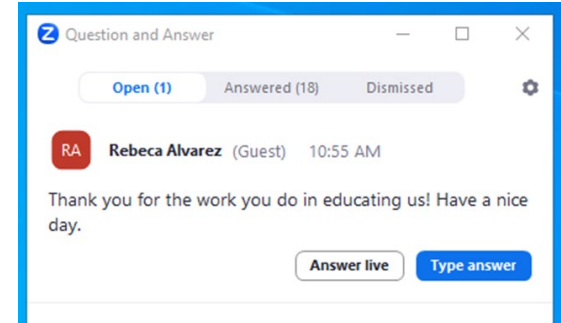
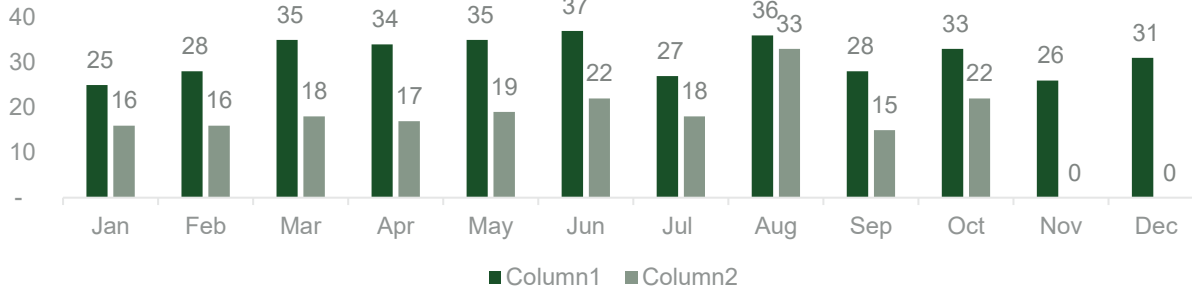
- Offer employers additional support and flexibility
- Ensure timely and accurate responses to all inquiries
- Handle escalations from Program Administrator



# Employer Education and Stakeholder Engagement



Webinars and Stakeholder Presentations



## 2022

- 318 public webinar sessions
  - 45 Spanish
  - 23 Mandarin
  - 21 Cantonese
- 14,661 registered participants
- 57 additional stakeholder events

## 2023 (YTD)

- 162 public webinar sessions
  - 47 Spanish
  - 20 Mandarin
  - 21 Cantonese
- 1,498 registered participants
- 41 additional stakeholder events



# Saver Education and Engagement



- Continue saver webinar series; market on website and materials
- Deploy field team and board staff for employer visits
- Continue organizing Spanish language stakeholders
- Partner with engaged community organizations and leverage their networks
- Identify labor and other stakeholder and community partners to amplify message to savers
- Explore ways to boost brand awareness through stakeholder messaging, on webinars, and in other marketing
  - Incorporate additional behavioral economics principals
  - Increase financial literacy
  - Combat biases



# Stakeholder Outreach



## Chambers

Actively communicating with 496 chambers throughout the state including local and identity chambers

## Industry Associations

Actively communicating with 150+ Industry and business associations

## Legislators

Actively communicating with legislative district offices to explore outreach partnerships

## Stakeholder Organizations

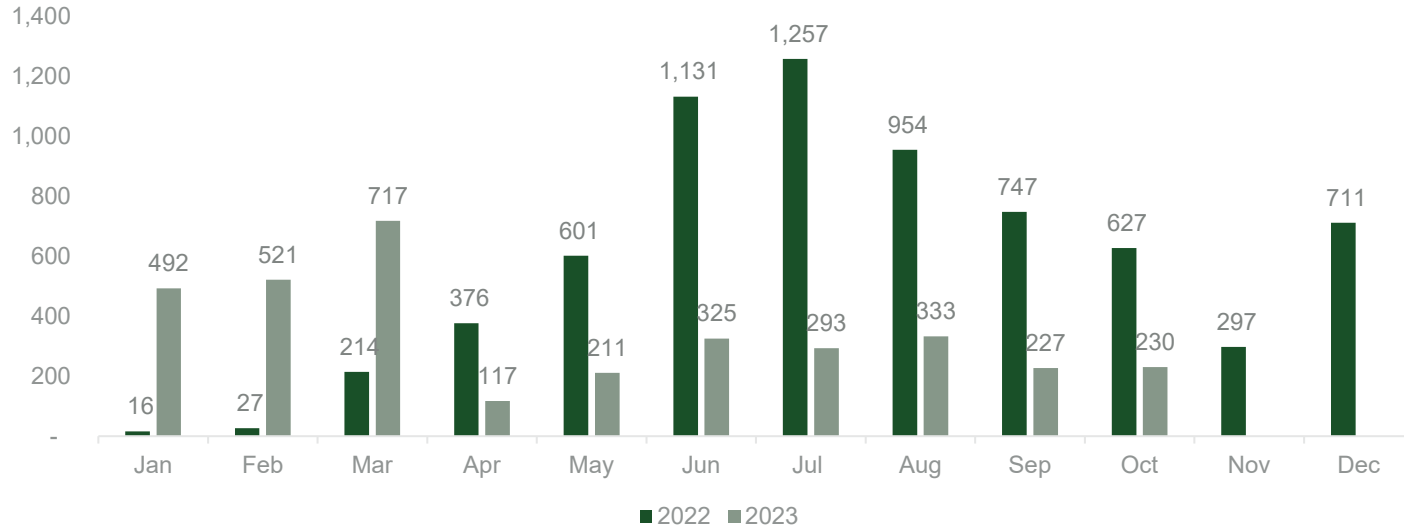
Leverage existing relationships and create new ones to identify local organizations and leaders to serve as trusted messengers



# Customer Service Inquiries



### Eligibility and Compliance Inquiries





# Recruiting Spokespeople and Generating Content

