

## ENSURE OPEN COMMUNICATIONS WITH A FLEXIBLE CALL CENTER

### SPECIALTY CALL CENTER TERMINATED VESTED SEARCH SERVICES FOR dbCONNECT

#### Client benefits

- Activate a temporary call center quickly and without overhead or permanent changes to infrastructure and management.
- Ensure data security and participant confidentiality.
- Leverage existing team, tools and processes to ensure consistency and accuracy.
- Achieve quality delivery and customer service.
- Meet compliance goals by using tools such as case-handling and call-recording processes.
- Mitigate short-term compliance risks by handling this population effectively and efficiently.

ExcellerateHRO's just-in-time Specialty Call Center provides assistance in locating and contacting terminated participants who may have become vested in your pension benefits (terminated vesteds). Our solution offers a participant research capability, as well as a staff of trained customer service representatives who can facilitate the resulting communication with the participant while delivering quality service simply, effectively and cost-efficiently.

#### Unexpected challenges require call center capability

As noted in ExcellerateHRO's May 5, 2009 client alert regarding the Seventh Circuit decision, unexpected challenges related to this decision may require additional support for your organization. With HR departments short on resources and/or supporting an already heavy work burden, ExcellerateHRO can help you proactively address the work required for terminated vested populations.

To do so, we leverage your existing ExcellerateHRO dbConnect database to identify terminated vested participants and establish a secure call center to ensure accurate, informative customer service after these participants have been located. The call center can be set up and brought down within a limited amount of time and with predictable costs. Our call center staff, specifically trained for this purpose, can manage a range of issues - from locating terminated vesteds who must be contacted to researching a beneficiary for cases in which the participant is deceased.

# ExcellerateHRO

The HRO business of HP

## WHY EXCELLERATEHRO

- ExcellerateHRO is the HR outsourcing business of EDS, an HP company.
- We are a full-service HR outsourcing company offering a flexible portfolio of services to mid-size and large organizations around the world.
- We bring decades of proven benefits administration, technology and business process outsourcing expertise to address your business needs.
- We have developed leading solutions that enable our clients to achieve their HR and business goals.
- More than 350 companies on five continents trust their HR services to ExcellerateHRO.

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## Tailored solutions meet your organization's needs

Our Specialty Call Center provides clients with what they need, when they need it: a staff of knowledgeable customer service representatives, trained to respond quickly and effectively to specific business needs. The flexibility of our tools enables our call center to handle these details:

- Research a participant's latest address
- Contact the participant and provide the information related to his/her vested benefit
- Research the current beneficiary if the participant is deceased
- Provide accurate, timely and streamlined reporting on all contacts with the participant

Our Specialty Call Center Terminated Search Services are provided in three tiers, enabling you to choose the level of service that best fits your business needs:

- Search
  - Research the most recent contact information for the terminated vested participant
  - Provide appropriate reporting
- Search and contact
  - Research contact information and contact the terminated vested participant
  - Inform participant regarding vested benefit and where to call to start the process of receiving his/her benefit
  - Provide appropriate reporting
- Search, contact and update
  - Research contact information and contact the terminated vested participant
  - Inform participant regarding vested benefit and where to call to start the process of receiving his/her benefit
  - Leverage your existing ExcellerateHRO dbConnect system and team to address this initiative seamlessly, with limited time commitment on the part of your staff
  - Update the benefit information within your dbConnect system
  - Provide appropriate reporting