



Frequently asked questions (FAQ)

May 2024

Service improvements: Client Care Centre telephone system

1. What is Amazon Connect?

Amazon Connect is a secure cloud-based telephone system provided by Amazon Web Services (AWS). This platform includes multi-channel communication abilities and built-in security protocols. We're using it to help direct plan member calls to the right team the first time.

2. Why are we moving to this new telephone platform?

The new platform makes it easier for plan members to get the help they need. It helps us direct their calls to the right team more quickly and efficiently.

In addition, Amazon Connect helps provide a higher level of security through leading encryption and data security features.

3. What is the effective date of this change?

To help ensure a smooth transition for all Sun Life plan members and Clients, we're taking a phased approach for the launch of the new telephone platform. The Group Benefits Client Care Centre (CCC) will start rolling out new features in the third quarter of 2024.

4. What changes are happening?

New capabilities will help to make it easier, quicker, and more efficient for plan members to get the help they need:

- A simplified experience:
 - We've added new, plain language menu options to help plan members tell us why they're contacting us.
 - We then route the call to the CCC representative with the required skills to support the plan member. This will help reduce multiple transfers and plan member frustration.
 - Plan members will hear a new voice on the system.
- More convenience:
 - If plan members need to wait on hold, we've added a message to let them know how long the wait is.
 - A new call-back feature lets the plan member ask us to call them back, so they don't have to wait on hold.

As part of the future rollout, we'll also be adding a Voice ID component. This will further enhance the plan member experience by providing them with another way to verify their identity.

5. How does the call-back feature work?

After 3 minutes on hold, we'll give plan members a choice which allows us to call them back.



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6. What happens if plan members don't answer when called back?

If plan members have Caller ID on their phone, it will show it's Sun Life calling them. If they don't answer the first time, we'll try again 2 more times. If we don't reach them after 3 attempts, we'll leave a voicemail.

7. Will these changes lower wait times?

With these changes, we do expect plan members to get to the right place more quickly and easily.

In the future, we'll also add self-serve options for simpler questions. This means our CCC representatives will be available to answer complex questions more quickly.

8. Will plan members still be directed to the same teams at the CCC as they are today?

The CCC team supporting your plan members isn't changing. The menu options simply help direct plan members' calls to the CCC representative who can best answer their questions.

9. Are there any changes to gold queues?

Gold queues will continue to be protected and given priority in queue. The new phone platform will help improve the service.

10. Can plan members or plan sponsors opt out of Amazon Connect?

No. Plan members and plan sponsors must use the new platform to connect with our CCC.

Vendor specific questions

11. Is Amazon Web Services (AWS) a new vendor?

No. AWS is Sun Life's preferred cloud provider. Amazon Connect is a service provided by AWS that Sun Life uses to deliver some of our CCC services to plan members.

12. What due diligence has Sun Life done on Amazon Connect?

Sun Life is accountable for any services and functions outsourced to a third party and remains accountable for the associated risk despite the services being outsourced. Sun Life maintains management frameworks supported by internal expertise to oversee and manage the outsourced activity and the relationship with the third party. We align to the Office of the Superintendent of Financial Institutions (OSFI) B10 guidance related to Outsourcing of Business Activities, Functions and Processes.

Contracts and service level agreements (SLAs) are in place to govern outsourced services. Security risk assessments are conducted by our Information Security team to ensure that the security controls the third party has in place are sufficient to protect Sun Life's information. Critical vendors/suppliers are assessed annually. In addition to conducting risk assessments, the Information Security team consults with Procurement and Legal teams. The engagement ensures third party contracts include appropriate security requirements, terms, and conditions.



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13. Where will the data reside and how is it protected?

Client and member data specific to this implementation will be stored on Sun Life's Private Cloud Environment utilizing strong encryption algorithms (AES 256-bit encryption) and logical segregation where applicable.

14. What access to Sun Life member data does Amazon Web Services (AWS) have?

AWS doesn't have access to any Client or member data.

15. What is Sun Life's Information Management Risk policy?

Sun Life's Information Management Risk policy sets out requirements for mitigating risks related to the management of Sun Life information. Business record retention guidelines consider legal, regulatory, business, and contractual requirements for retention of business records. Business records, including Client information, may be retained beyond termination of contract to meet legal, regulatory, or other requirements.

Questions?

Contact your Sun Life Group Benefits representative.