

ADMIN BACKLOG

DATA QUALITY AND ADMINISTRATION SUPPORT



The focus on pensions data has never been so great.
The quality of your data directly impacts:

- Valuation processes
- Annual benefit statements
- Data quality scores
- Member experience
- Process efficiency
- Retention of administration team



GOOD QUALITY DATA

At the heart of every pension fund is data – without good data day-to-day operations can't happen smoothly.
We can help you improve your data quality by:

Analysing your data

We use our unique technology to extract, analyse and report on your data.



Cleansing your data

We help reorganise and cleanse your data.



Managing your data

We'll work with you to help keep your data in the best possible shape for the long term.



ADMINISTRATION SUPPORT

If you need some support to run one-off admin projects or clear a backlog – we can help.

Step 1. Backlog analysis

What?

We'll analyse your data to accurately determine the size of your backlog, and understand the type and complexity of cases. This analysis is performed at fund, employer and member level – so you'll have a great understanding of your data quality too.

Why?

- Enables accurate scoping of resources and timescales of the project.
- Allows for prioritisation of casework – for example members approaching retirement.
- Develops understanding of data quality.
- Ensures best outcomes from third party provider procurement to deliver best value for money, whilst avoiding delays and scope creep.

Step 2. Data collection and casework processing

What?

We'll collect your data and agree a set of tolerances and rules, we'll then start processing. Usually we start where all the data is available as this helps us get to know and use the schemes system, processes and documents to ensure quality.

Why?

- A dedicated project team focussed on clearing your backlog means your BAU will not be impacted.
- Our tried and tested approach is efficient at collecting data in such a way that it minimises the impact on the scheme, employers and payroll providers. It also increases the success rate.
- Defining rules and tolerances allows us to increase the number of cases that can be processed even where data cannot be obtained.
- We're able to tackle complex, "messy" cases – we won't leave these ones to you!

Step 3. Process improvement

- Once we've cleared the backlog we provide feedback on existing processes. This helps set out a plan to implement changes, improve efficiency and reduce the likelihood of backlogs recurring.