



# Strategic Plan

2025

Service Delivery

# Strategic Plan – 2025 Highlights



## Vision

Providing our customers with a better tomorrow

## Mission

Responsibly delivering a first-class customer experience every step of the way

## Customer Focus

Relentless focus on delivering value to the customer

### Compliance

Ensuring best practice while delivering our statutory obligations

Pension Reform outcomes

TPR code of practice

Regulatory changes– McCloud, GMP, PDP

### Ready for Today

Laser focused on continuously improving efficiency and effectiveness

Customer Insight

Asset allocation alignment

Review and improve key policies and strategies

Enhance financial controls

Data Management

Continuous improvement

### Better for Tomorrow

A confident organisation with the resilience and agility to meet challenges

Digital Innovation

Implications ex Local Govt reorganisation

Growth and Future Proofing (Disruption/New Bus Models)

Customer engagement

Border to Coast oversight & partner fund relationships

Investment beliefs/RI

People

Capability Build

Systems & Process

Project Oversight

Communication

Customer focus

Culture & Values

Culture evolution

# Strategic Plan - Service Delivery

## Compliance

Ensuring best practice while delivering our statutory obligations

### **Regulatory Change:**

Deliver regulatory projects & implement the necessary changes into day-to-day operations

### **TPR Code of Practice:**

Review the administration strategy and implement changes that best support delivery in line with scheme governance

## Ready for Today

Laser focused on continuously improving efficiency and effectiveness

### **Continuous Improvement**

Maximise existing system capabilities to improve user and customer experience

### **Customer Insight:**

Better understand our customer requirements by increasing levels of feedback to deliver a high-quality service

### **Data management:**

Review data quality standards to enhance its accuracy for our members

## Better for Tomorrow

A confident organisation with the resilience and agility to meet challenges

### **Digital Innovation:**

Implement a digital strategy that will enhance customer experience and operational efficiency

### **Customer engagement:**

Increase levels of engagement to ensure we meet customer needs and deliver meaningful change

### **Future Proof & Growth**

Optimise the operational model to best position the service against any potential challenges

### **Strategic Partnerships:**

Continue building collaborative & strategic partnerships with key suppliers to improve service provision

People

Systems & Processes

Communication

Culture & Values

# 2025 Business Plan Summary - SD

Strategic Plan Link	Ref	Description	Timing	Owner
Compliance	1	Deliver statutory projects & implement regulatory changes into BAU <ul style="list-style-type: none"><li>GMP: Complete rectification</li><li>McCloud: Complete rectification</li><li>Pension Dashboard: ISP connection go live</li><li>Valuation Data Cleanse</li><li>Backlog 2.0</li></ul>		SD – Ops Teams SD – Benefits Team SD – Ops Teams SD – Ops Teams SD – Legacy Team
	2	Review, implement & actively manage the administration strategy		SD – Benefits
Ready for Today	3	Review performance metrics to further maximise productivity and improve customer satisfaction		SD - Benefits
	4	Maximise existing system capabilities to improve user and customer experience <ul style="list-style-type: none"><li>Complete digital monthly return roll out for remaining employers</li><li>Process automation for refunds</li><li>Automation of new starter process</li><li>Enhance online services for pensioners</li></ul>		SD – Ops & Benefits Systems Benefit Membership & Data Pension Payroll
	5	Optimise customer service provisions through iterative improvements, that deliver high quality experience to our customers		SD – Customer Relationship
	6	Implement enhanced data standards across the service to increase focus on data quality		SD – Membership & Data
Better for Tomorrow	7	Implement system, process and digital enhancements to deliver improved customer experience <ul style="list-style-type: none"><li>Implement improved employer portal services (self service employer estimates ASAP)</li><li>Implement improved member portal services</li></ul>		SD – All  SD – Ops & Benefits SD – Ops & Benefits
	8	Increase customer engagement through multiple channels to fully understand customer requirements and deliver meaningful change <ul style="list-style-type: none"><li>Implement employer feedback mechanism</li><li>Implement member feedback mechanism – 1 or 2 key processes</li></ul>		SD – Customer Relationship
	9	Optimise the Ops model to future proof against any potential internal or external change		SD – Head of Service
	10	Continue building collaborative & strategic partnerships with key suppliers to improve service provision		SD – Head of Service