

# NI Services to Pensions Industry Customer Conference

“Working Together to Improve Communications and  
Administration”

Customer Evaluation Report

Held on 11 October 2006

## BACKGROUND

Following customer feedback from visits and via the NISPI Newsletter, a Pensions Conference was held on 11 October 2006 at Benton Park View. The conference was organised and facilitated by the NISPI Customer Support Team.

Out of an expected 54 pension providers and scheme administrators 50 attended on the day with 34 completing evaluation questionnaires.

The following customers attended:

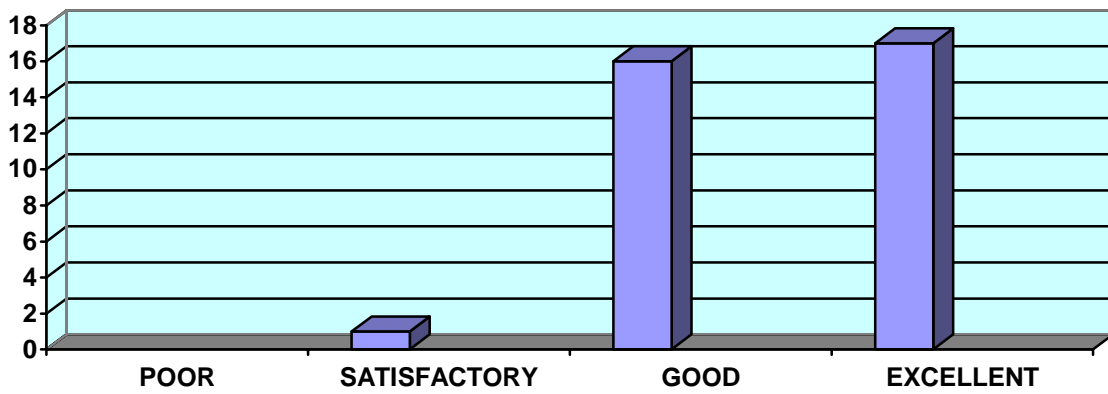
<b>Name of Organisation(s)</b>	<b>Name of Representative(s)</b>
AXA Sunlife	Colin Kirchell Mike McCabe
Barclays	Michael Johnson Tim Connett Melissa De Rosa Hayley Wyatt
British Rail	Jason Scott Anthony Corbett
Friends Provident	Ian Kynaston Samantha Little Dorrie Shears
HBOS	Diana Illinworth Joanne Hall Cathy Biggs
HSBC	Keith Marks Ian Day Melanie Spriggs Claire Wright
L & G	Colin Burgess Jackie Latter
Mercer	Ken McCue Austin Conway Lesley Stirling
NHS	Paul Wilson
NU	Matthew Burrell Neil Baker Carolyn McDonald Amanda Hunt Keiran Oconnor Stephanie Evans
Pensions Regulator	Guy Murphy
Prudential	Paul Marshall Bev Morris Joanna Cerretani Charlene Carnegie Susan Smith
Scottish Equitable	Malcolm Cuthbertson
Scottish Life *	Simon Cockburn Paul Spellman Heather Roberts Helen Mellor
Standard Life	Kirsteen Mackett Alison Pentland Alan Watson

Teachers	Andy Myers Enid Wallinger
Tesco	David Hughes
Zurich	Kate Young Glenys Barrett
JLT	John Reeve

## EVALUATION QUESTIONS

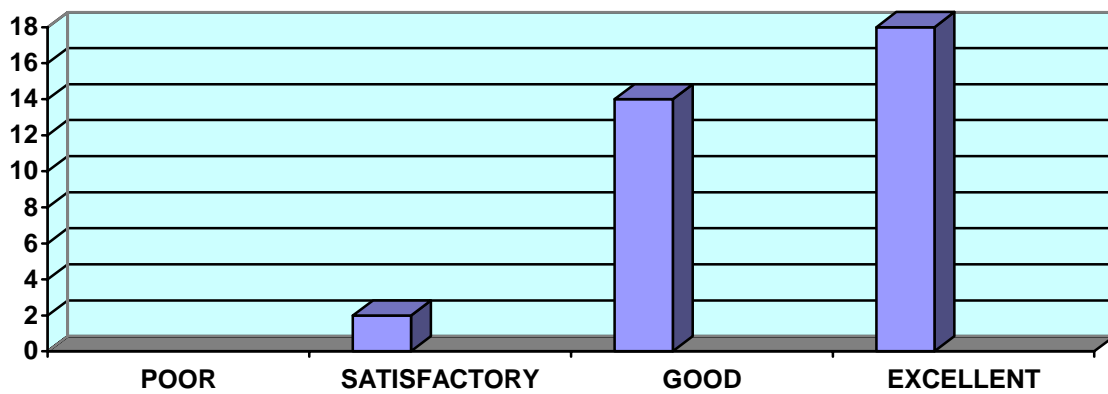
Representatives answered the following questions:

- How did you find the pre conference arrangements?

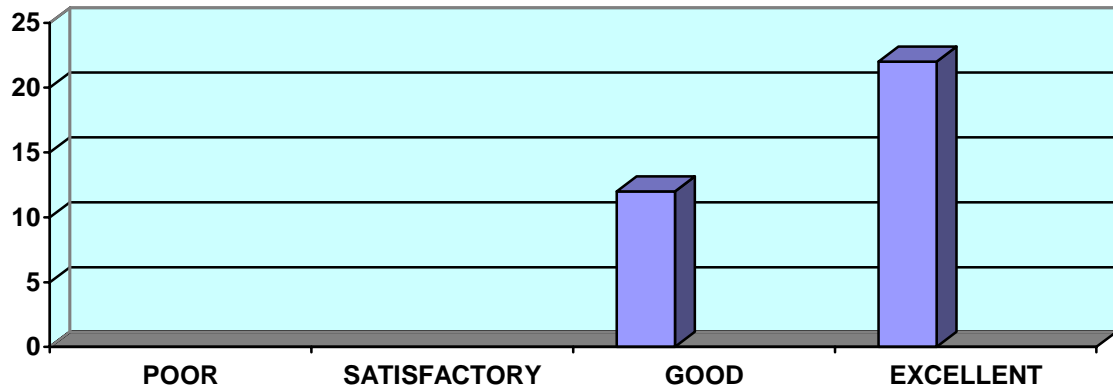


- How did you find the:

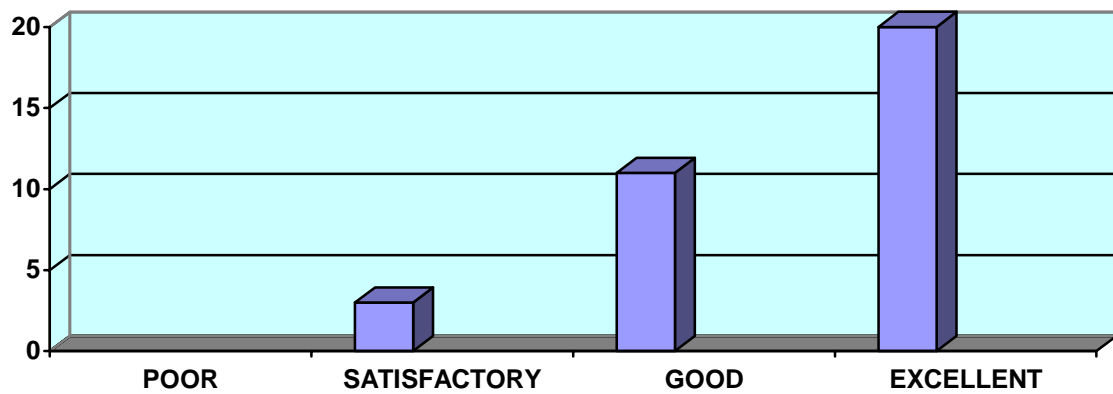
DOMESTIC ARRANGEMENTS



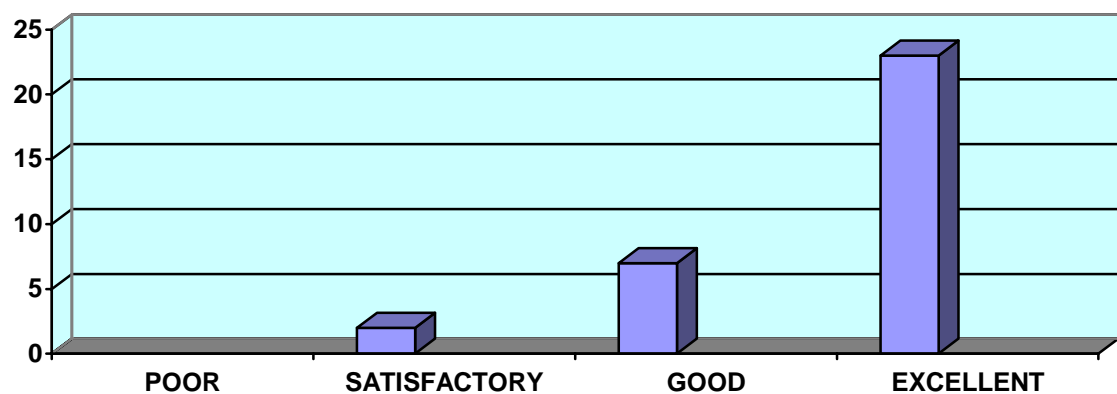
## GENERAL ORGANISATION



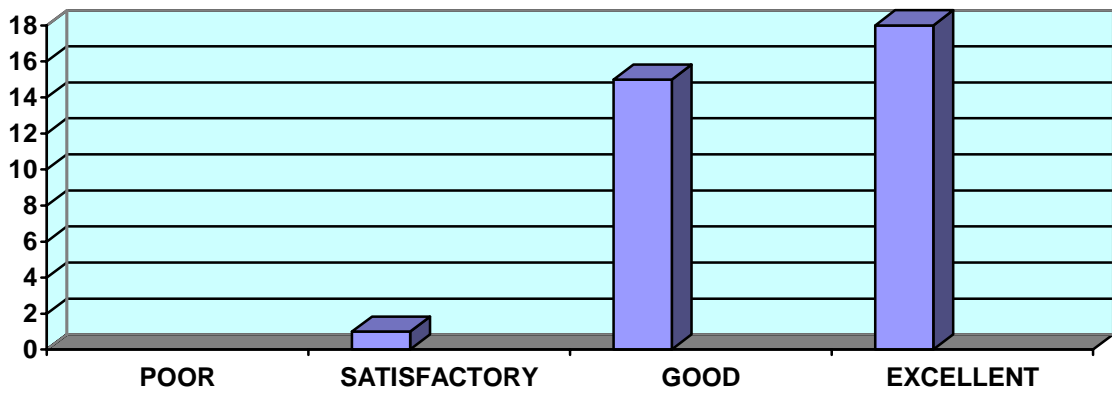
## USEFULNESS OF DELEGATE PACK



## REFRESHMENTS BUFFET

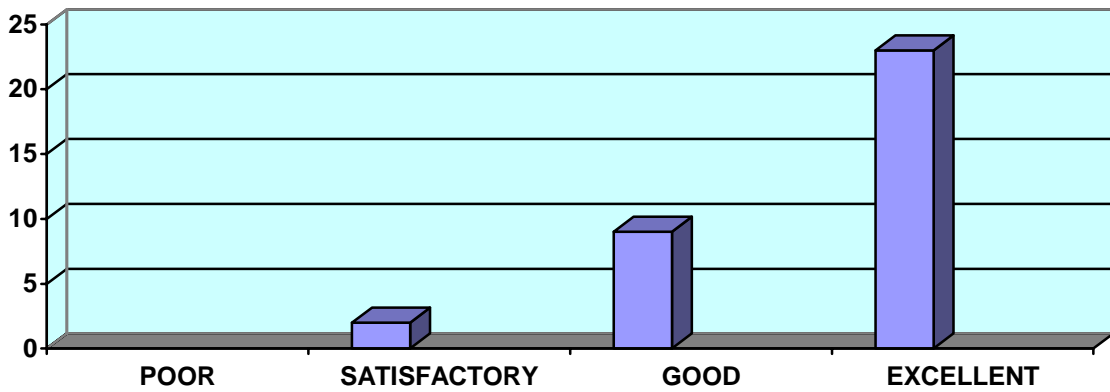


## VENUE

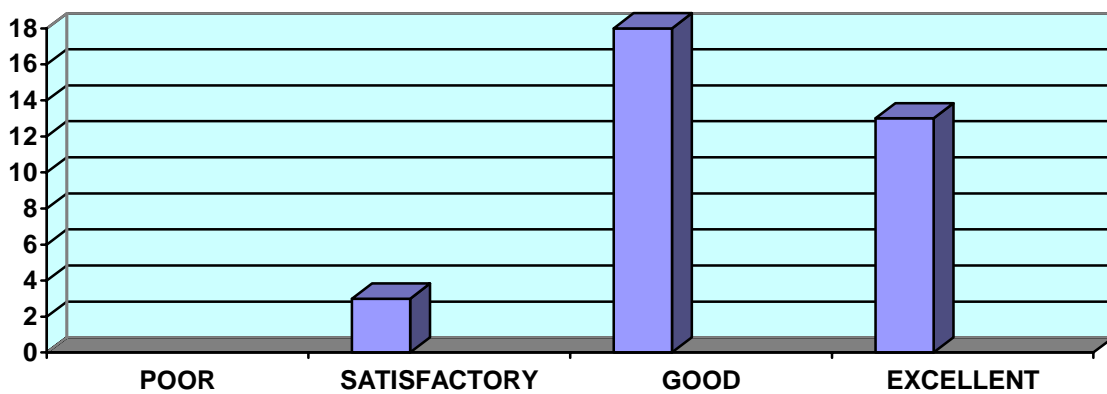


3. What did you think of the presentations?

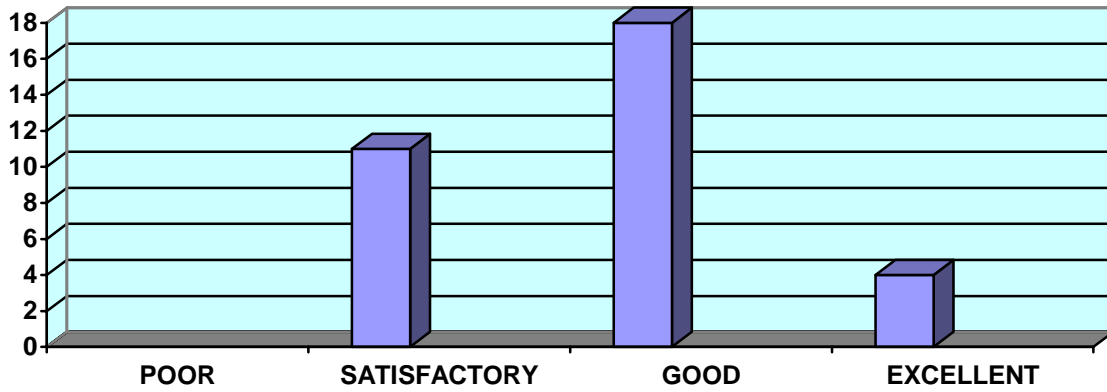
## SHARED WORKSPACE



## COMBINED PENSION FORECAST

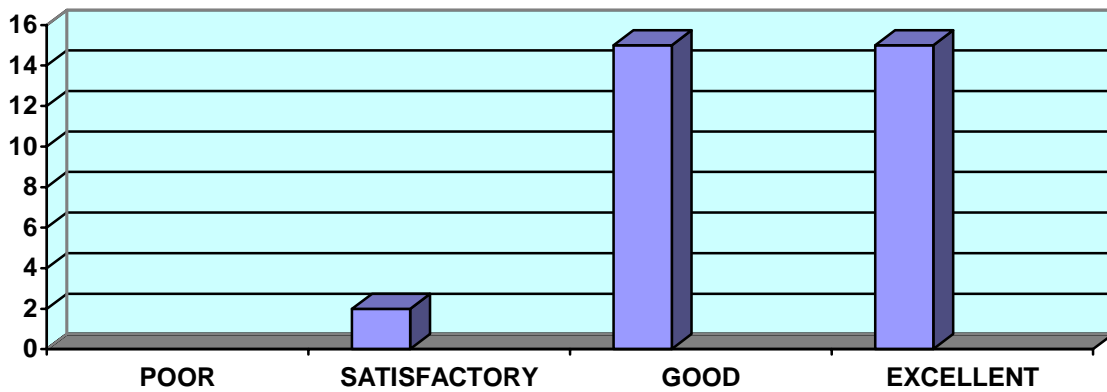


## ENQUIRY SERVICES



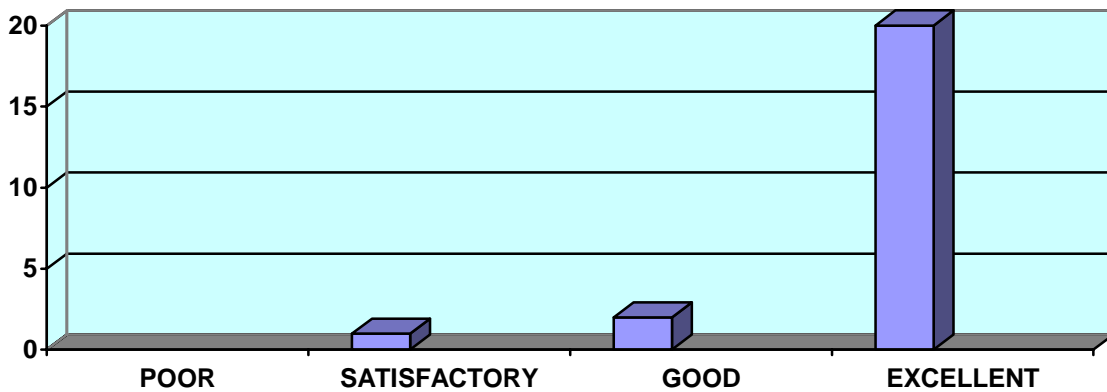
(1 Declined to comment)

## RAISING STANDARDS for PENSION ADMINISTRATORS



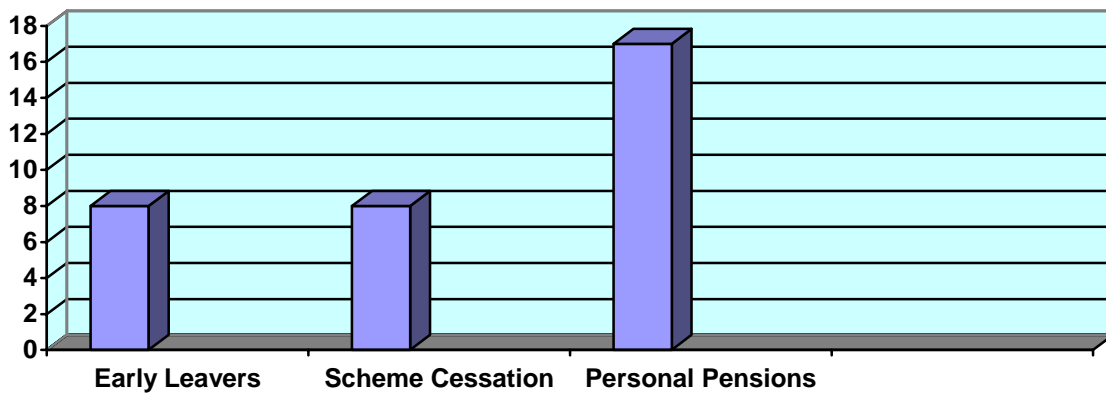
(2 Declined to comment)

## Government White Paper



(10 Declined to comment, 1 Unsure, Irrelevant to Occupational Scheme, good speaker though)

4) Which breakout session did you attend?



(1 Declined to comment)

5) What did you think of the content of the breakout session that you attended?

EARLY LEAVERS



SCHEME CESSATION



## PERSONAL PENSIONS



(1 Declined to comment)

6) Which parts of the breakout session did you find most useful?

- I find the “help us to help you” attitude to be fantastic change.
- It had little relevance for me:-
  - 1) we don't have any COMBs/COMPS
  - 2) It was too low level for my position/relationship with NISPI
- The Breakout session & CPF presentation
- Meeting the people
- Being able to discuss general queries with members of the PP & RPWB teams
- Breakout session was good able to ask several questions about AUTs face to face. Keynote speaker Margaret Snowden was particularly inspirational.
- Good overview of form process. Good to speak to people regarding our priorities.
- Explanation of how area works. Importance of need to provide correct information/completion of forms.
- Understanding why forms are updated.
- Talking to Gina Ridley about the CA1544 rejections.
- Good choice of relevant subjects to choose from. Chance to meet other administrators and chance to meet COEL team & Customer Support Team.
- Good mix of subject. Chance to interact.

- AUTs understanding implications of not producing termination notices.
- AUTs
- Understanding of the process
- The mini breakout session where we could talk to members of HMRC about forms.
- Content about form completion and opportunity to talk to others.
- Speaking to the NICO contacts about real issues
- Details regarding rejected CA forms. I have requested forms to be sent to me.
- With regard to forms, help available & more importantly the staffs help and info. I would have liked more of this session
- Opportunity for individual chats. Shared workspace demo.
- All were of interest.
- The question and answer session at the end.
- Forms and issues. Talking to colleagues
- Handouts, contacts, and enthusiasm.
- Re statement to client manager working and “Shared Workspace”
- Errored input & CAM approach process and participation.
- Impact of forms not completed on time. An overview of how my company works with you.

(5 Declined to comment)

7) Is there any other subject that you would have liked to have been covered on the day?

- Ways to encourage members to complete forms.
- No, good coverage
- No, it was good broad scope.
- No, it was very good
- On line GMP notifications
- More on white paper reforms especially regarding GMP

- More definition about schemes & IPP (PP)
- Deemed Buy Back
- Wind ups – probably for another conference

8) Overall do you think that the conference was a success?



(1 Declined to comment)

9) What do you think made it a success?

- Open & collaborative and informative.
- Open & honest attitude is refreshing.
- Good overall agenda. Good organisation and above average levels of attention to the needs/comfort of delegates. Usual (and much appreciated) friendliness of NISPI staff. Opportunity for input in Paul's (final) session.
- Good structure of the day. Chance to ask questions. The breakout session.
- Very well organised, very informative & very professional.
- Subjects covered, friendliness of staff.
- Good balanced agenda.
- The chance to meet face to face these people that we previously we only spoke to on the telephone.

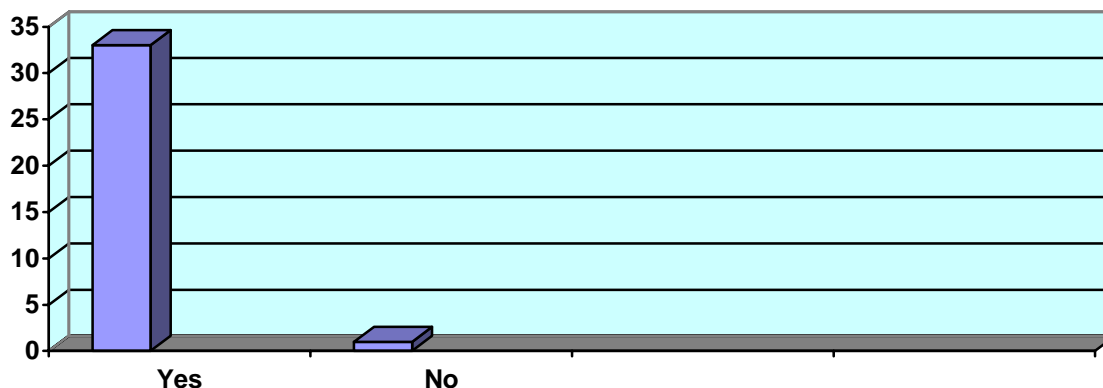
- Varied topics, focus on the basic issues, excellent keynote speaker, everyone from NISPI/NICO being so friendly.
- Great to put names to faces. Chat to people, great to talk openly about 2012.
- Short sessions, good speakers. Different ways of presentations/breakout sessions.
- Friendly and welcoming.
- The way the different subjects were covered. A lot of information without going into too much technical jargon. Personal Pension session particularly good.
- Relevant subjects chosen during presentations. Nice to see team members given the chance to present during sessions.
- Good mix, good speakers, chance to speak to NISPI staff (& DWP). Agenda fluid enough to cope with overrun of speakers.
- Clear, straightforward informative session executed with ideal length of time to avoid mind wandering. Totally focused.
- Clear and concise information. Ideal timing of sessions.
- A variety of topics at different levels being covered, which were at relevance to those working in the industry.
- Right pace & variety
- The organisation was top class, well run and interesting topics.
- Excellent content and well organised.
- The human approach of the Customer Service Team. The desire to improve things for the member. Catering.
- The day was planned very well. Each topic wasn't too long, ensuring it held our interest. The Customer Support Team were fantastic, very friendly & helpful. I found the white paper section very interesting.
- Open & collaborative information.
- The support team, organisation & the flow of the day. The hospitality shown to us.
- Varied presentation, just right length. Chance to discuss views on abolition of Contracting-out.
- Very informative.
- The scope of the topics covered the comprehensiveness of the presentations and the excellent organisation.

- Meeting contacts/networking. Looking at industry issues/concerns to help effectiveness moving forwards. Shared workspace was excellent get it rolled out.
- Organisation, presentation, preparation and content.
- Being able to see the staff we regularly talk to & being able to understand the bigger picture.
- Open and honest views, feedback which is responded to and answered in plain language and achievable aims that will benefit all parties.
- Well organised & good presentations
- Organisation, length of each talk.

#### 10) What would have improved it?

- More time with the team who process our work for feedback, & questions.
- More specific areas covered i.e. maybe a Personal Pensions conference?
- If it had been tailored to Personal Pensions only.
- Issue of a delegate list before hand is useful to assess who/what areas of speciality are being represented.
- More time set aside with teams.
- Notice that the final session was going to be purely DC. This was a change to the agenda & wasn't made clear until the session started. Not relevant to DB only administrators.
- More time to discuss our concerns.
- More time in breakout session to chat about particular issues.
- More of a balance between scheme's DB/DC & individual Personal Pensions.
- Individual packs to hand out at end of conference from each of the speakers, which would cover contacts, basic responsibility details etc etc.
- Breakout sessions make more audience participation occur perhaps pre-submitted questions/issues.

11) If we held a similar event in the future would you be interested in attending?



(The delegate who ticked no wrote but would suggest it to colleagues)

12) Please write below any other comments you would like to make about the conference?

- Very worthwhile, maybe next time split over 2 days as a lot was discussed in a small timescale.
- It would have been nice to have a delegate list.
- Well done! Very enjoyable event.
- Excellent marks.
- Better information to find venue.
- More water would have been good & available throughout.
- I thought it was very well organized and the presentations very good.
- Yes may need to advertise and market to a wider audience.
- A great success/well done. Very worthwhile on a personal level.
- Excellent organisation, relaxed environment credit to Customer Support Team 10 out of 10.
- Relaxed. Excellent organisation.
- The written instructions to get to you are incorrect and make it impossible to get to you by car. Please update how to get there directions for car travellers for future visitors.
- Wonderful – thanks.

- The NISPI team made us feel very welcome and I felt they valued our attendance and input. I have found today very informative and would very much like to visit again.
- Very useful day, I gained a lot of information. I was kept interested all day.
- With the introduction of on-line services I feel that co-operation and timeliness can only improve.
- The customer relationship between NICO and providers is fantastic. Well done. Excellent day – staff were superb. Toilets - Sinks soaking wet – got wet when washing hands and lent on worktop.
- Excellent all round day, well done to all.
- Well done – good first conference.
- Carole Henderson pre conference contact was excellent.