

Evaluation Report

NI Services to Pensions Industry Customer Conference

“Working Together in a Changing Environment”

Held 7th November 2007

At Benton Park View

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BACKGROUND

1. NI Services to Pensions Industry held their first Customer Conference in October 2006. Following on from the success of this, NISPI Management decided that a further Conference should be held. The original concept of holding a conference for NISPI customers came from suggestion by a customer at a visit by the Customer Support Team.
2. On 8th August 2007, expressions of interest were received after customers were canvassed, using the Newsletter distribution list, to establish whether the take up would warrant a further conference. Initially around 70 customers expressed interest and interactive invitations were issued via e-mail. On the day, 58 delegates/ customers attended from a wide range of organisations shown in Appendix 1.

PREPARATION AND ORGANISATION

3. Once the decision to go ahead was made an action plan was put in place by the Customer Support Team to cover every aspect of taking forward the conference. Building on the experience of the 2006 Conference, lessons learned were taken into consideration and every detail captured.
4. The Customer Support Team held weekly checkpoint meetings to ensure all areas were covered and, wherever possible, nothing was missed.

CONTENT AND AGENDA

5. The Agenda was formed using feedback from the previous year's conference, topical issues at the time and NISPI Management input, eg Breakout Sessions. The Customer Support Team also incorporated suggestions such as "The Customer Experience" and Employer Programme issues. Feedback on the conference arrangements, content and agenda items is shown in Appendix 2.
6. Interactive breakout sessions were facilitated by NISPI Higher Officers and Senior Officers, supported by note takers at Officer level. A number of questions were put to customers in groups of 10. Appendix 3 shows the questions which were asked at the breakout sessions.
7. The breakout sessions proved to be very successful and some excellent feedback was received. The Customer Support Team collated the feedback and discussed at the NISPI Management Team Meeting where it was decided that Key Themes would be identified. Appendix 4 shows the positive Key Themes and areas NISPI areas for improvement.
8. Other more detailed issues specific to particular areas within NISPI were also identified and passed to the appropriate Senior Officers.
9. NISPI will be taking forward all of these comments/issues via an action plan which the Customer Support Team will monitor. Problem solving events will be used to address areas for improvement, whilst balancing the expectations of customers.

STAFF

10. NISPI's staff were involved in the conference to meet and greet and helping with refreshments. They also set up stands to talk about the areas of work they deal with at the networking lunch. Verbal feedback from the staff about their participation has been excellent and they were all sent letters of thanks.

CUSTOMER FEEDBACK

11. Evaluation sheets were developed by the Customer Support Team and given out on the day.
12. Some delegates that attended the conference took time to give us additional feedback after the event. There were some very positive messages about the organisation and the structure. These are shown in Appendix 2.
13. Approximately 35 customers stayed on after the conference ended to visit teams within NISPI and meet staff face-to-face in their working environment. Some customers took the opportunity to return the next day to have further meetings and discuss issues. This worked well the year before at the first conference and it is a good way of identifying issues to take forward in joint action plans.

BENEFITS OF THE CONFERENCE

14. Feedback confirms that the conference was a unanimous success by strengthening relationships with customers and by benefiting new and existing partnerships. NISPI cannot provide any statistical information that proves that conferences of this sort are beneficial. However, there are some excellent examples of working together with customers that have developed from the 2006 and 2007 conferences, which have highlighted the benefits of holding such conferences.

WAY FORWARD

15. NISPI will be holding another conference in 2008. We will research and develop the content using the comments from customers and by bringing in topical issues that emerge, for example "2012".

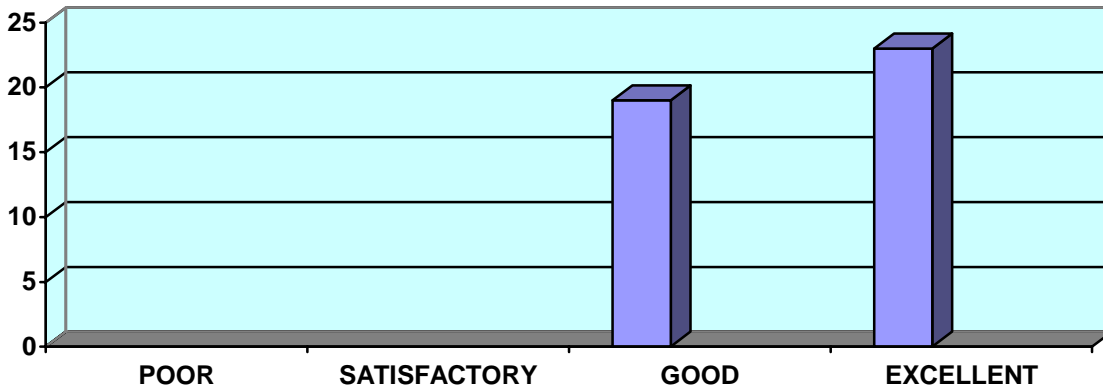
Appendix 1 - LIST OF ORGANISATIONS ATTENDING

Aegon
AON
AXA
Bevis/Buck
CAPITA
Civil Service NI
Electricity Pensions
Hazel Carr
Hewitt
Higham
HSBC
The Institute of Payroll Professionals Its limited
Kerr and Co
KPMG
Lancs CC
Lane, Clark and Peacock
Legal and General
Mercer
PFPG
The Pension Protection Fund
The Prudential
Punter Southall
Royal London
Royal Mail
Rpmi
Scottish Life
Scottish Public Pensions
Scottish Widows
South Yorkshire Police
Standard Life
Sun life of Canada
Western Power
West Midlands Pensions
Wise Speke

Appendix 2 – CUSTOMER FEEDBACK FROM EVALUATION

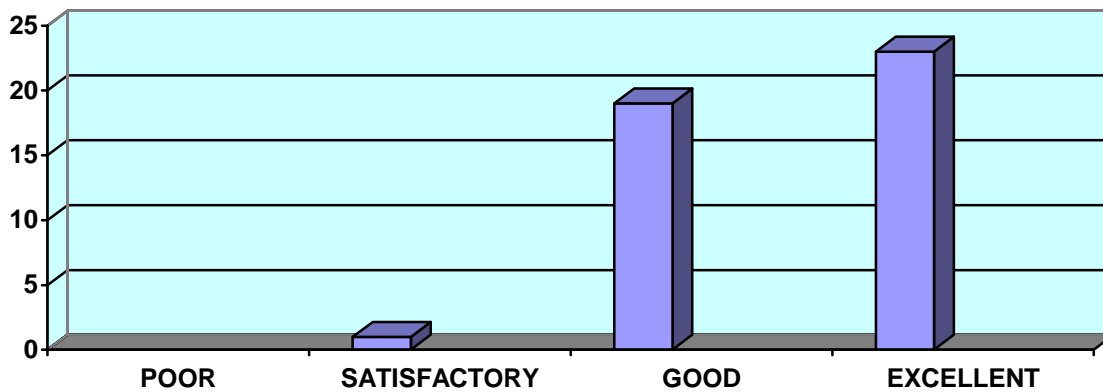
42 delegates completed a feedback sheet and answered the following questions:

Question 1. How did you find the pre conference arrangements?

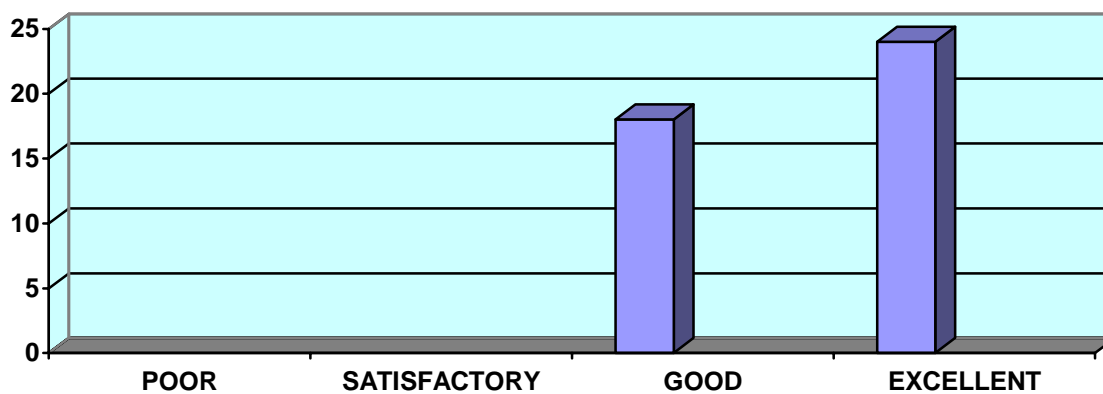


Question 2. How did you find the following:

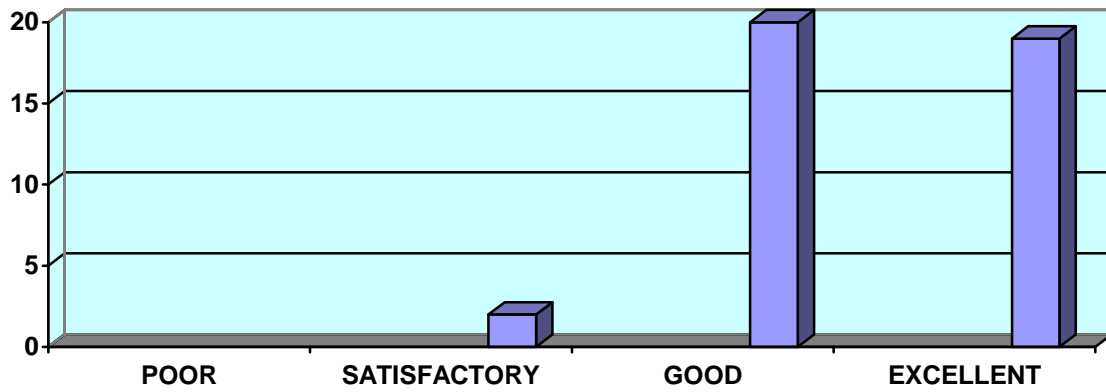
DOMESTIC ARRANGEMENTS



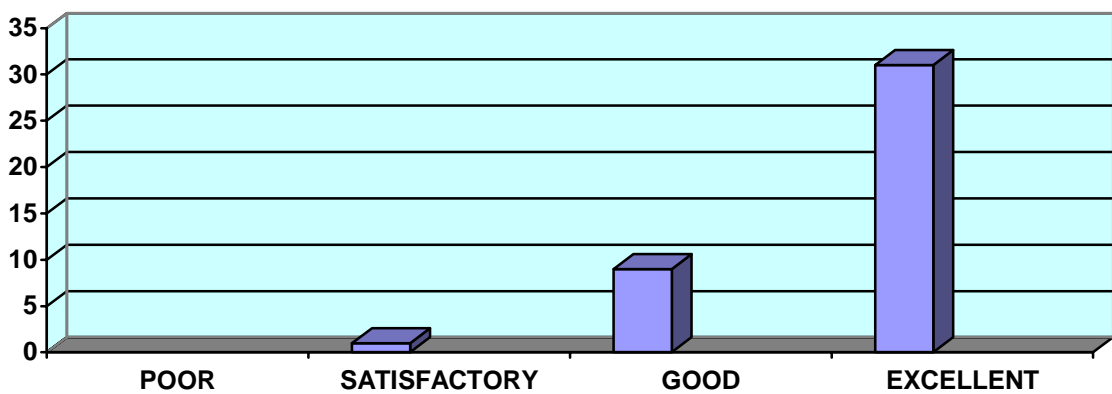
GENERAL ORGANISATION



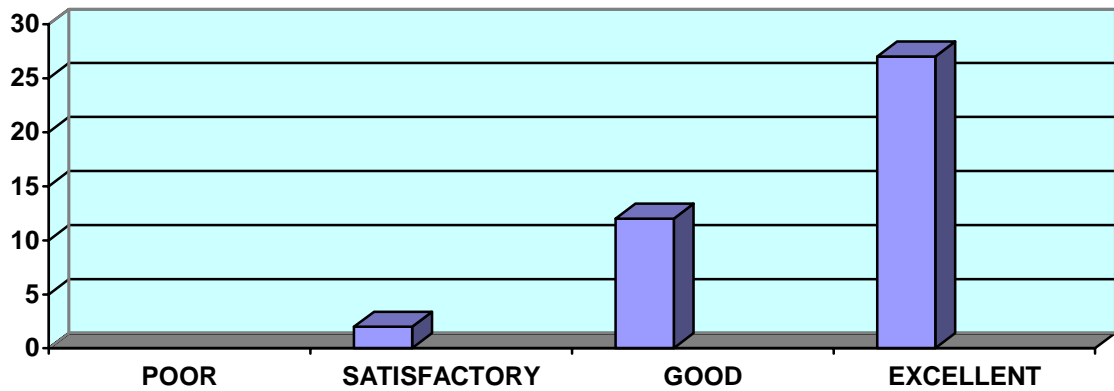
USEFULNESS OF DELEGATE PACK



REFRESHMENTS BUFFET

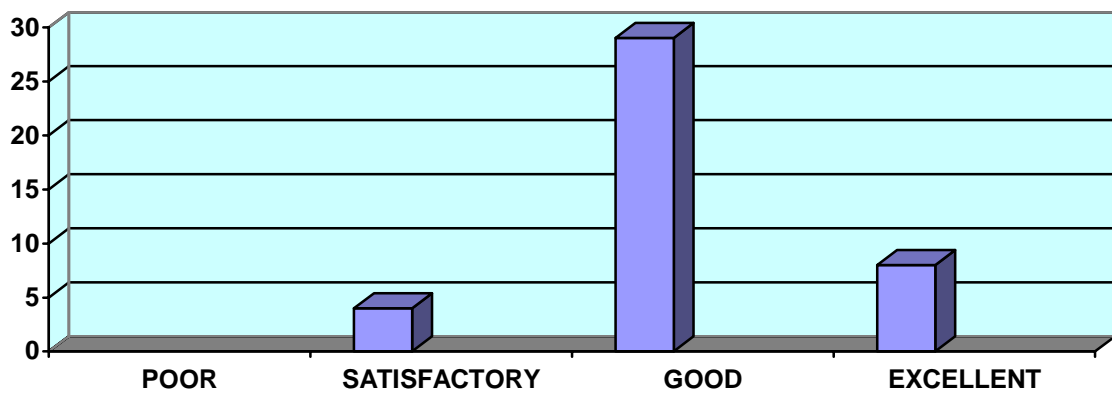


VENUE

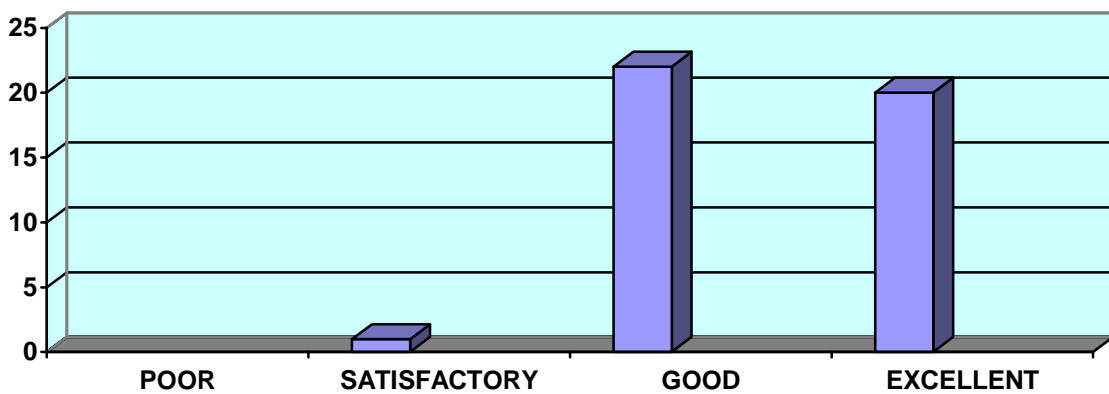


Question 3. What did you think of the presentations?

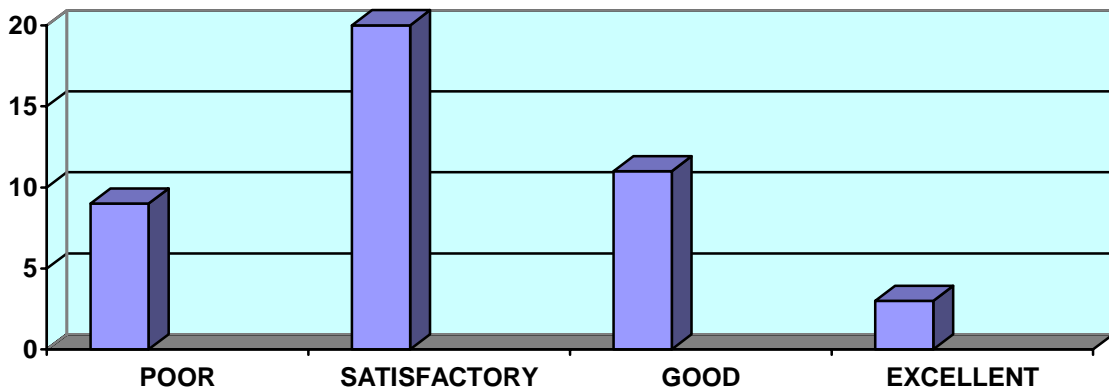
STRATEGIC OVERVIEW



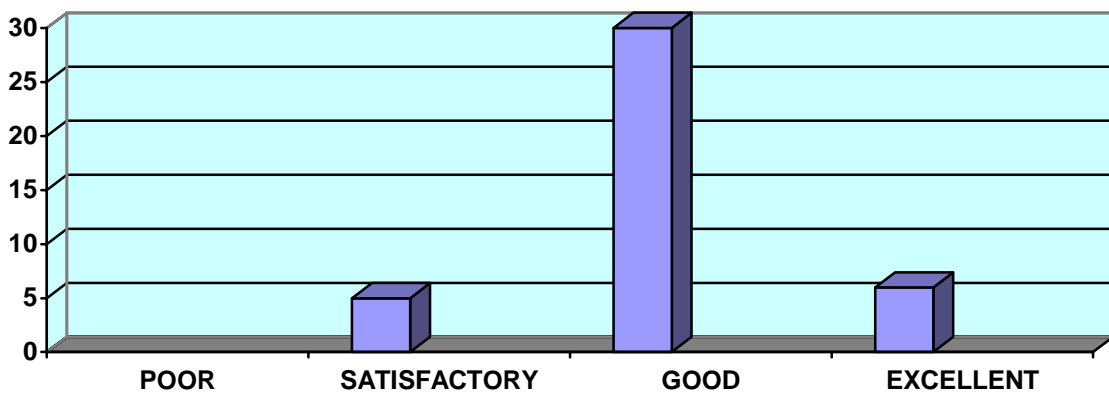
IMPROVING OUR PROCESSES



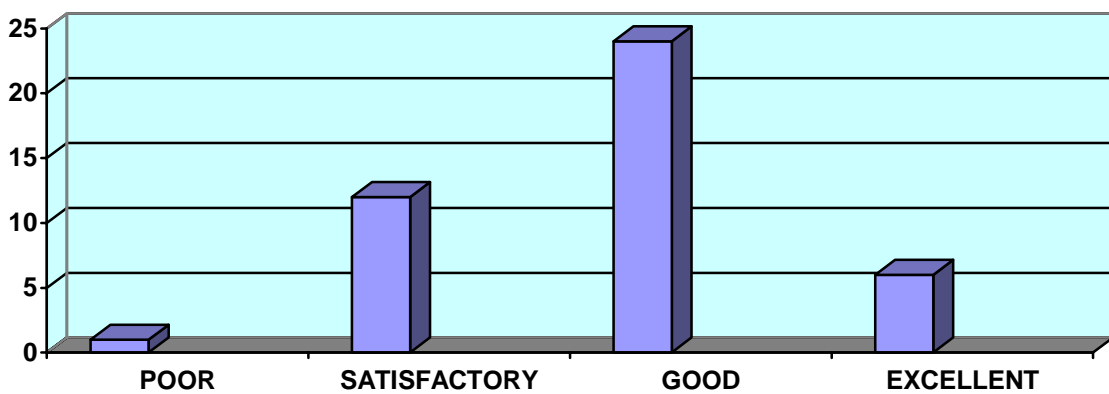
PENSION REFORMS



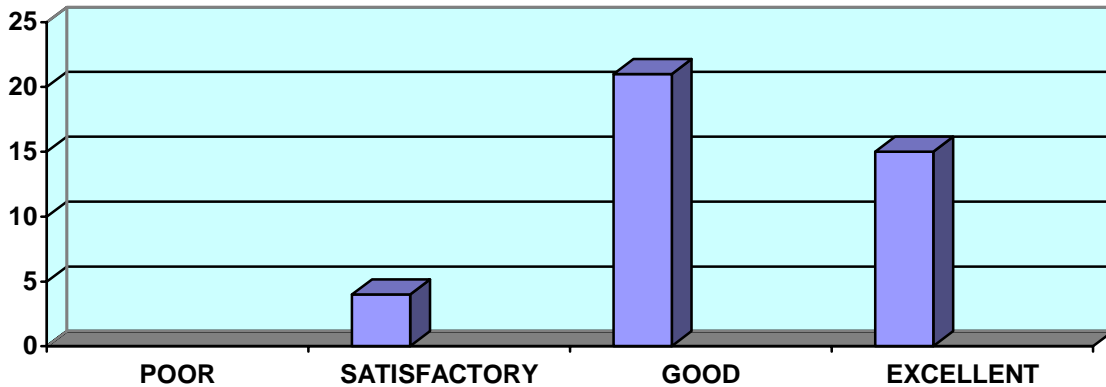
WINDING UP SCHEMES



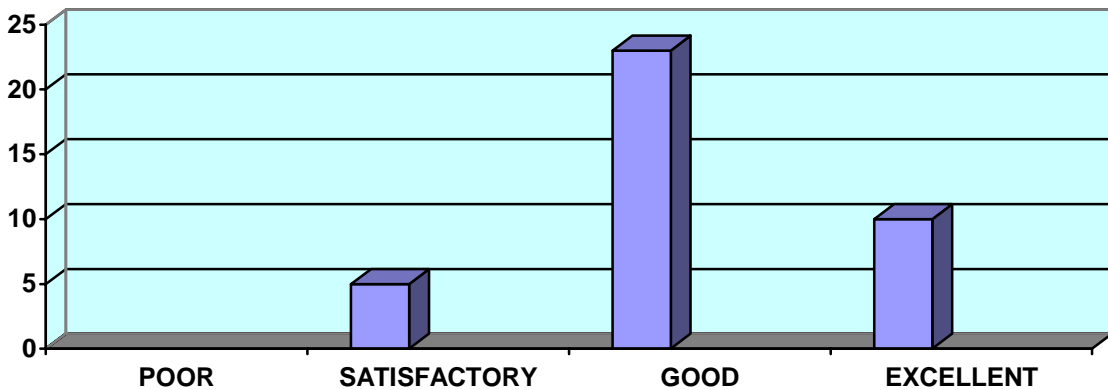
FORGING STRONGER LINKS



A CUSTOMER VIEW



Question 4. What did you think of the content of the breakout session that you attended?



Question 5. Which parts of the breakout session did you find most useful?

The delegates said that the breakout sessions gave an opportunity to discuss areas which were going well. They were able to give feedback and also identify areas for improvement. Customers could compare with each other on what they thought was working well with NISPI and where problems were encountered. Positive comments on way the managers facilitated the sessions were fed back.

They appreciated having the opportunity to put across some of the issues their organisations have in obtaining information required by NISPI.

Feedback focussed strongly on the sharing of ideas/views and interacting with other pensions' people, giving opinions honestly and sharing experiences. There was a sense of realisation that generally providers had similar issues.

Delegates appreciated the chance to discuss topical issues openly and gaining a different perspective. Others had confirmation of how good our relationship is with NICO teams.

They thought the questions at the breakout sessions were good and very open.

Question 6. Is there any other subject that you would have liked to have been covered either in the presentations or in the breakout sessions?

Many suggested that the breakout sessions could have lasted longer, perhaps with some pre-event pointers for areas of discussion (ie what areas did NICO want feedback on).

Some thought more clarity in Defined Benefit/Defined Contribution split – (feeling was a lot of the content weighted towards Defined Benefit). Although the questions were designed to be quite general, focussing on communications for example.

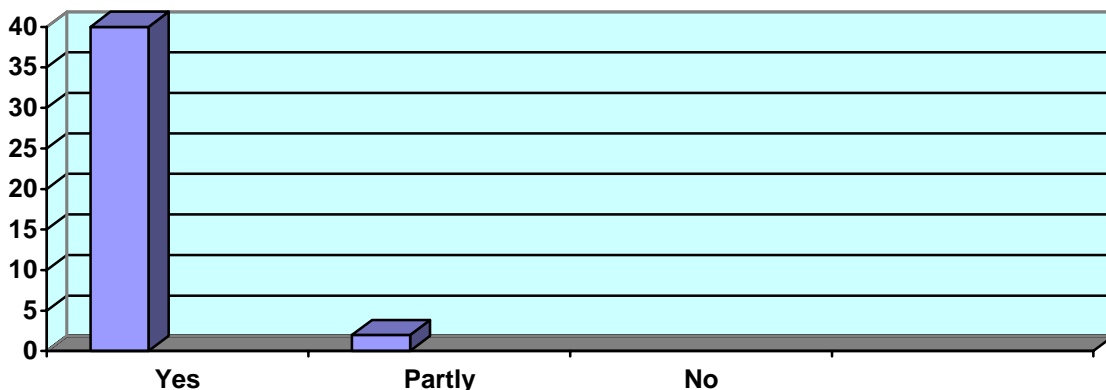
As the Shared Workspace was extremely topical, customers wanted more focus on the functionality and practical experiences of using it. The Shared Workspace was recognised as a good way of working together, in a secure environment with more specific discussions in breakouts about Shared Workspace.

One customer thought that General COEL presentations would have been useful, but that was what we did in the first conference and we wanted to take things along a different route this time around.

A more detailed session on how DWP, HMRC (NISPI) will work together on principle based regulation.

More information on Retirement Pension Widows Benefit processes would have been interesting and Guaranteed Minimum Pension liabilities.

Question 7. Overall do you think that the conference was a success?



Question 8. What do you think made it a success?

Many customers commented about the willingness and open, friendly helpfulness of the NISPI staff in an informal and relaxed atmosphere. They appreciated the opportunity to interact and ask questions and meet other representatives from across the industry. Customers felt that their views were being listened to, everyone was approachable and that staff were professional and that the people made the conference.

Commenting on the presentations customers said they were informative, current and relevant. They covered a few different areas including a good mixture of specialist areas and general topics.

Customers enjoyed hearing speakers from different backgrounds – NISPI, DWP and Prudential

The Master of Ceremonies was very good and made a good impression.

It was interesting to hear the same topics from different backgrounds, and a good idea to get a “customer’s experience” (Paul Marshall from Prudential) to emphasise building “partnerships”.

Customers thought that the content was well pitched [not too detailed/too high level] with the presenters themselves receiving excellent feedback with comments about their positive and enthusiastic attitude. There was impressive “stepping in” by Russell and Karen to cover for speakers at the last moment. The speakers were well-informed, generally tried to avoid “21st Century” business speak and gave information on hard facts.

Many commented on how well the event was organised saying “very well organised, good choice of subjects, pleasant environment and good refreshments”.

The opportunity to network with NISPI and other pension providers/administrators was thought to have worked well throughout the day.

Customers were interested in hearing about the improvements that NISPI and HMRC as a whole have recently been implementing through the LEAN process. This included a willingness to give an update on where NISPI is on various issues and processes. They thought it was excellent to be given updates from HMRC and how it is changing.

The opportunity to meet with teams in NISPI after the conference was appreciated. Staff were friendly and had the chance to meet face-to-face and talk about issues.

They enjoyed the fast moving agenda and good subject matter with good NISPI representation and there was a strong vibe of NICO’s commitment to be flexible and work with the pensions industry.

Question 9. What would have improved the conference?

Many of the attendees thought that more breakout focussed sessions, with more audience participation would be useful and wanted more on 2012 plans.

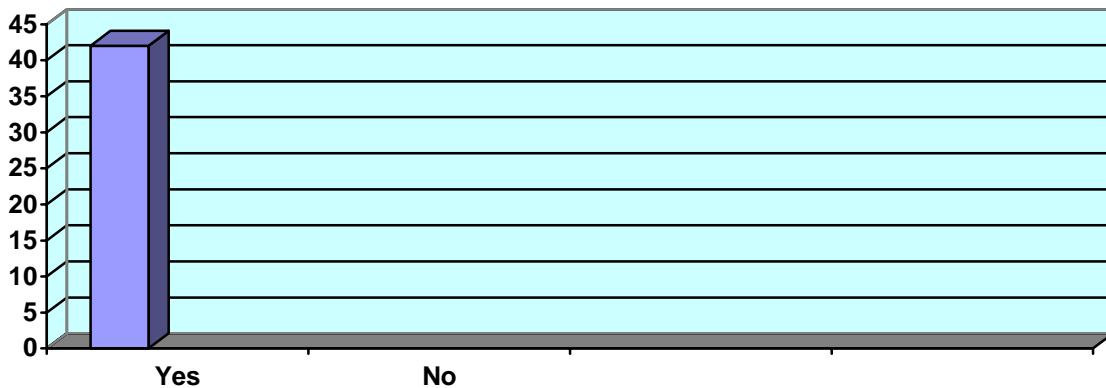
A greater explanation on pension reforms was mentioned.

Two of the breakout sessions had been held in the larger conference room which had been a bit distracting which made it difficult to hear properly. This is being addressed in the lessons learned.

Some thought that breakout sessions may have been better with like-minded administrators in the same group, for example COEL discussions rather than a mixture of personal pensions, final salary, defined benefit. Others thought that more time at lunch to visit stands and to network as getting providers around a table and talking about successes and failures works so well.

More air in the conference room and a little more space was commented upon.

Question 10. If we held another conference next year, would you be interested in attending?



Question 11. Additional comments about the conference. See below:

- “A day well spent.”
- “Useful to ascertain direction NISPI is going and why.”
- “Very interested in the details given about Shared Workspace and will discuss this further with management at my employer to see if we can take advantage of it.”
- “A more detailed note of what was going to be covered would help, to ensure it was an appropriate conference to attend.”
- “Excellent organisation, speakers and food!”
- “As pretty much everyone is going back to either Airport or Taxi – could mini buses be organised? Easier at end of long day! And numbers could be organised ahead with pre-conference arrangements.”
- “Main thrust of breakout session was Scheme Cessation, coming from SPPA which administers an unfunded public sector scheme this was irrelevant to me.”
- “Interesting and informative.”
- “Sorry had to leave early, would have loved to do more, maybe need to do breakouts before lunch next time.”
- “During the breakout session – discussion relating to Data Protection and multiple requests/replies were mentioned. I may be able to point to an organisations policy on how this is dealt with.”
- “Standard Life are interested in taking part in discussions about 2012.”
- “During “Pensions Reform” it was mentioned help was required from “practitioners” Mercer would like to be involved.”
- “I would like to be involved with the stakeholder group on pensions reform mentioned by Eileen. (IIP).”
- “Practicalities of NISPI working with The Pensions Regulator and Pension Protection Fund would be useful next time.”
- “Last year’s conference was good – this year’s even better. Keep content topical.”

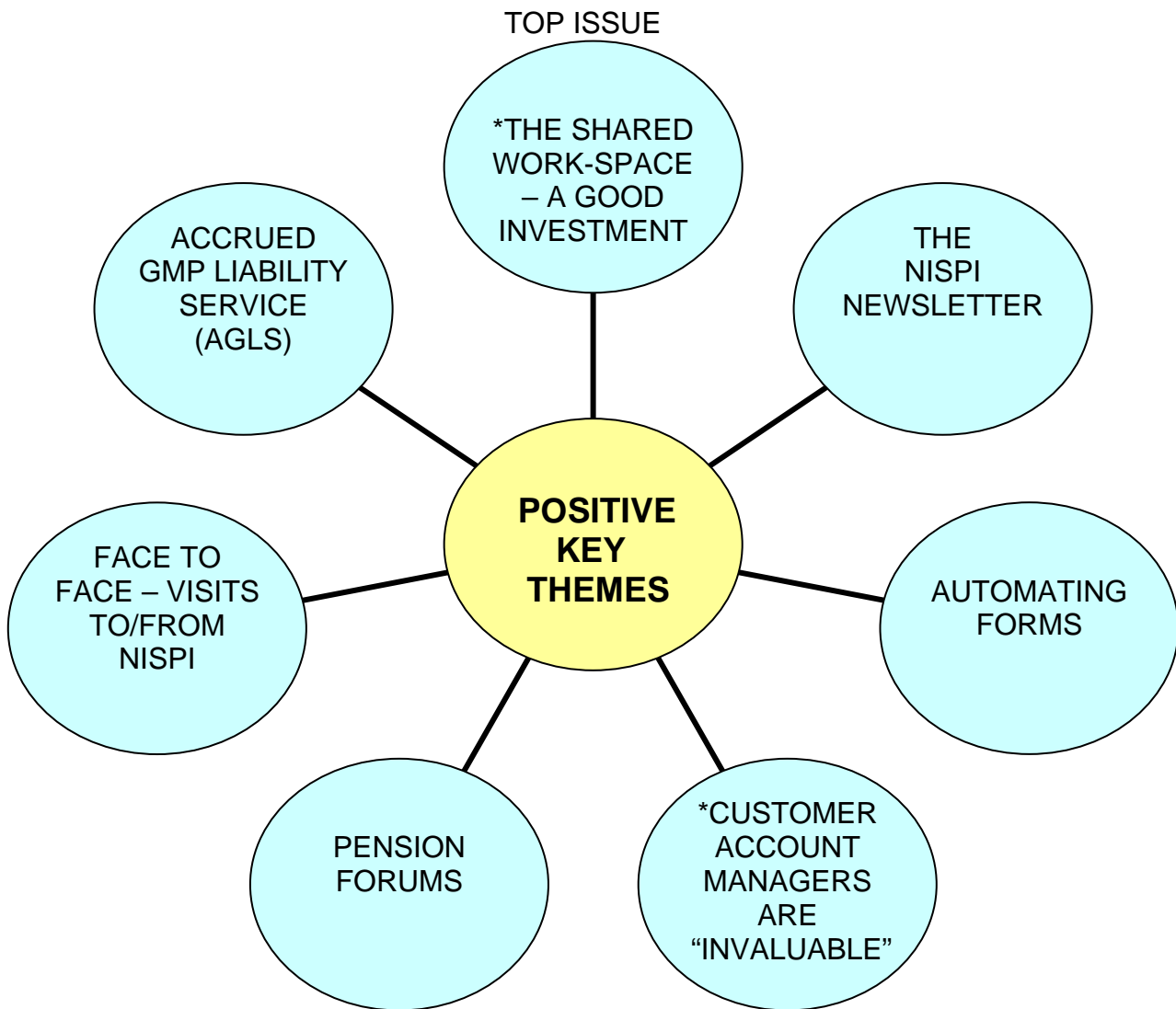
Appendix 3 – BREAKOUT SESSION QUESTIONS

Breakout Groups	Questions
Groups 1, 3 & 5	<ol style="list-style-type: none"> 1. How easy do you find it to contact the right person/area within our organisation? Do you ever get in touch with our contact centre? 2. What is it you like least when having to contact us, and why? 3. When we write to you is it clear what information we are looking for? Are there any problems with our communications? 4. What practices are in place in your organisation that we could learn from? 5. Do you have any examples where you consider our service was either above or below your expectations?
Groups 2, 4 & 6	<ol style="list-style-type: none"> 6. If you have a CAM – what is it you like about the arrangements? Could these arrangements be made better in any way? 7. What do you think we do well? 8. If you were able to change one thing about the way we work together, what would it be? 9. We use the NISPI Newsletter to convey information to you. Is the format “user friendly”, are there any additional topics you would like us to cover, or are there any other ways in which we could communicate that you would find more helpful? 10.* Information about NISPI can be found on the appropriate web pages. Is this a medium that you find useful and is the site easy to navigate?

***Please note – Question 10**

We cannot change the way into our NISPI site. The best we could achieve is 4 clicks. It used to be 10.

Appendix 4 – BREAKOUT SESSIONS - FEEDBACK



* Customers appreciate the shared workspace as it has speeded up processes and reduced paper. Also popular is Customer Account Management, more of this way of working is required and a consistent approach across NISPI on what constitutes a Customer Account Manager, as it is more than just having a contact name.

