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ATKIN

TRUSTEES, ACTUARIES, CONSULTANTS & ADMINISTRATORS

BEST PRACTICE
Experienced Pensions Administrator

We provide pension administration services to a wide range of final salary pension schemes. A Senior Pensions Administrator is required to provide assistance to the client managers and, where appropriate, act as client manager. There will also opportunities to support our Independent Trustee team and perform a Trustee secretarial role. As a small company there will be other opportunities to get involved in all aspects of pensions and the business as a whole.

Ideally candidates will have a minimum of 5 years pensions administration experience in a client facing environment and be progressing with professional pensions examinations. Candidates should be able to carry out basic benefit calculations and be comfortable with day to day pensions administration.

Maintain and build client relationships

- First point of contact for clients for all major queries
- Responsible for client delivery pre-empting what is needed for future tasks and being proactive rather than reactive
- Ensure that all issues and queries are dealt with promptly (including any with the team)
- Regular communication with the client to ensure that we are aware of any issues and any improvements that they may want
- Attend client meetings, ensure packs prepared ahead of time and action points dealt with
- Proactively seek/create opportunities to participate in client interactions to ensure highest levels of customer satisfaction are achieved
- Ensure project deliverables meet and/or exceed client expectations
- Implement communication strategies with client to effectively promote accomplishments and keep up to date with project progress
- Develop in depth understand of client business needs and improve services in light of
- Manage all billing and budgets, investigate and manage write offs. Pro-actively communicate and changes of delivery status to the client
- Carry out an annual scheme health check to assess client satisfaction

Manage clients so work is carried out promptly and within/below budget

- Monthly meetings with the client team to review scheme summary sheets, ensure that workflow is being scheduled and progressing. Identify and discuss any issues.
- Weekly meeting with the operations manager to ensure that client tasks are being managed and identify any issues
- Prior to any project being carried out agree budget, timescales and process with the team. Ensure that allocated team fully understand the work they have been asked to do and provide training and support where necessary
- After each project carry out a post project review with the team identifying what went well and where improvements could be made. Communicate to the department manager any changes that need to be made to processes
- Check to ensure that all files and directories are kept orderly with only useful copies saved
- Support other members of the team, offering them support when they look in difficulty/busy

Ensure client work is accurate and maintain high standard of service to our clients

- Peer review all significant pieces of work and spot check regularly other items (particularly templates). Ensure that Do-Check-Review procedures have been followed. Provide feedback to the team where there are issues and to the departmental manager where templates/processes can be improved.
- Review monthly checklists and quarterly administration reports
- Sign off data changes at least once a quarter

- Promote use of standard models and reports and feed back on improvements
- Review/Check work from viewpoint of the scheme, ensuring that peculiarities are picked up
- Answer phone promptly and politely. If not client proper phone notes passed on

Assist in managing and developing the administration team

- Provide on-the-job training where required. Provide feedback on all errors and provide support to ensure understanding and address knowledge gaps.
- Provide regular feedback to junior members of the team throughout the year, including requesting that files are updated and review procedures are followed
- Support juniors in managing their workload and communicating to other team members
- Provide formal training sessions where appropriate

Contribute to growing company reputation and to winning new business

- Provide support to the senior management team with marketing initiatives, generating new business opportunities and building client networks and relationships
- Where proposed as administration manager for a prospect, help to draft the tender documents and take part in any pitches

Develop and manage templates/checking procedures

- Manage templates ensuring that these are available for all standard calculations and kept up to date. Work with the client managers and department heads to make sure these are as good as they can be.
- Check bespoke calculators for each Scheme, ensure that they have been signed off by the client manager and are reviewed once a year (should be tied in with usage)
- Manage standard documentation/templates ensuring they are up to date and reflect client managers feedback comments/changes
- Ensure that Breaches and Errors are recorded and reported appropriately.
- Work with the rest of the administration team to develop and maintain standard calculators/documents/checklists for main administration tasks, including Scheme Renewal/Pension Increases/Monthly Checklist/Administration Reports
- Provide support with the set-up of standard scheme take on documentation and benefit/data audit sheets/report

Ensure that work is fully checked and follows correct procedures

- Work with department heads/client managers to manage workflow. Be aware of SLAs, disclosure requirements, legislative requirements and deadlines and make sure work is managed to the agreed internal and external deadlines
- Ensure that correct do-check-review procedure is carried out for each task and appropriate stamp/sign off before it is passed on for review
- Ensure that calculations are clearly laid out with all figures in reports and emails supportable and evidenced on file
- Minimise time spent on review by ensuring that work passed on is easy to follow. Checks that have been performed must be clearly set out. Any issues and assumptions that require judgement must be addressed and summarised before the final review stage where possible
- Check work and ask questions/highlight to reviewer where do not feel confident to fully sign-off the work
- Ensure use of standard models and templates where available
- Draft emails, letters and reports with a professional tone, with the target audience in mind and with reference to previous communications if appropriate
- Acknowledge queries by email and pass on or answer promptly
- Ensure files and directories are kept orderly and up-to-date. File should be named sensibly with version control where required
- All work as part of the administration team to be completed in accordance with Intellipen processes
- Ensure that Intellipen is updated in accordance with the user guide.