



Customer Engagement Strategy 2015

February 2015

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Background

The West Midlands Pension Fund is one of the largest pension funds in the United Kingdom with over 275,000 members, in excess of 430 individual employers and £11bn invested. To maintain a high level of customer service success, it is vital for the Fund to understand the needs of our customers as well as their views on the services and products that we provide. This will assist in maintaining the high level of industry reputation that the Fund holds. The Fund can achieve this understanding by ensuring regular dialogue with our stakeholders is established and maintained as part of the day-to-day business of the Fund.

This document has been created to formalise our customer engagement strategy.

Objectives

The aims of this document are to detail:

- who are our customers?
- what is customer engagement to the Fund?
- when should customer engagement be considered?
- what types of engagement activities do we undertake?
- how do we use the outputs from customer engagement activities?
- how do we feed back to our customers results and actions from their engagement with us?

This document provides some principles for customer engagement for the Fund. We aim to tailor our strategy to individual customers and, therefore, this document should be viewed as a guide and not an exhaustive list of engagement activities.

Scope

The information contained in this document is relevant to all Fund staff, as well as those working on behalf of the Fund and representatives of the Fund, including trustees and employers.

Who Are Our Customers?

Whilst not an exhaustive list, the Fund considers the following stakeholders as customers within this customer engagement strategy:

- Contributing members
- Deferred members
- Members in receipt of a pension

- District employers
- Academy employers
- Other admitted employers
- Employer Peer Group
- Trustees of Pensions Committee
- Trustees of Investment Advisory Sub-Committee
- Members of the Pensions Board
- Fund staff through Staff Forum representatives

What is Customer Engagement to the West Midlands Pension Fund?

The Fund recognises that engagement is all about being involved with people and their ideas in order to understand them better. Engaging with our customers helps to build a connection between customers and the Fund.

By taking the time to participate in the engagement activities that are available, our customers have the opportunity to shape future customer journeys by being involved in process improvements and identification of innovative solutions that will exceed the expectations of our customers.

We believe that participants will feel empowered by the difference that they have made through the actions taken by the Fund from the feedback received.

The Fund seeks the input of our customers on aspects of our customer service with the ultimate aim of taking appropriate actions based on their feedback. We recognise that as well as regular feedback surveys, our customers provide their thoughts on our services through multiple routes and existing internal processes. These include, but are not exclusive to:

- telephone calls;
- letters;
- emails;
- web portal 'ask-a-question' processes;
- visits to reception/attendance at Fund events or presentations;
- complaints;
- compliments; and
- customer journey mapping sessions.

When Should Customer Engagement Be Considered?

It is essential that all Fund staff are able to recognise feedback when it is given. Our expectation is that every opportunity is maximised for the collection of feedback data.

From time to time, there will be instances where engagement is crucial. A recent example of this was the formation of the Governance Reforms Working Party where engagement was sought from key stakeholders to assist in shaping how the Fund was to respond to this important legislative change. Work is required to engage with Fund staff to build an understanding of the strategy, the benefits of engagement for both the business and our customers and the processes followed by the Fund to ensure the full potential of each opportunity is seized.

The journey to embed the strategy in to the culture of the Fund will take place over a period of time and will include various techniques, including:

- staff briefing sessions;
- one-to-one training;
- workshops;
- involvement in project groups; and
- shadowing opportunities.

Staff will also be trained how to identify the most appropriate feedback channels, allowing for individual circumstances, including reasons of equality and sensitivity.

What Types of Engagement Activities Do We Undertake?

The range of customer engagement activities which the Fund uses are diverse and include:

- surveys (available online at wmpfonline.com, via customer service advisors and in reception) which record feedback on many aspects of customer service including the quality of written material, online communication, in-person customer service, as well as gathering data on whether our customers believe they are treated fairly by the Fund;
- a robust complaints process which is monitored by the compliance and risk function of the Fund;
- a self-service officer compliment system where data is captured regarding customer compliments;
- a customer journey mapping programme which ensures stakeholders any changes to our internal processes benefit our customers; and

- during face-to-face contact, for example, at a Fund event like the annual general meeting (for trustees and employers) and our summer roadshow programme or visitors to our reception (for all members).

How Do We Use the Data From Our Customer Engagement Activities?

It is essential that customer engagement is not used as a 'tick-box' exercise. The output from any engagement activity should be seen to be used by the business in order to improve the customer service that we provide. By doing this, it is likely that we will receive continuous feedback from our customers and broaden the range of responses we receive which will ensure that, over time, feedback is more representative of our broad customer base.

Analysis for the previous quarter feedback data for members and employers will be compiled by Communications on 1 April, 1 July, 1 October 2015 and 4 January 2016 in advance of that period's Senior Management Team (SMT) meeting.

A report providing analysis of trustee feedback will be prepared in advance of the Pensions Board and Pensions Committee quarterly schedule, in accordance with the agreed reporting timetable.

Following the SMT review of the feedback, the following actions will take place:

- All feedback will be shared with Fund staff through publication on SharePoint and in *Staff Briefing Note*.
- All feedback and actions decided by SMT, to be reported to trustees.
- Employer data will be fed back to the Employer Services Team and they will liaise with the Communications Team to contact particular positive/negative feedback they wish to investigate further through informal discussion or CJM session.
- Employer feedback shared with employers through *Employer Briefing Note*.
- Overview of all feedback to be added to a 'How did we do?' page on wmpfonline.com.
- Events Co-Ordinator to identify any areas for CJM/further actions from feedback analysis.

Similarly, it is important to note that Fund decisions can not only be made solely on customer feedback. An approach considering both business needs and customer feedback should be taken regarding any decision which would affect our customers.

An important element of any customer engagement activity is managing how customer feedback will be used. It is therefore important that we give our stakeholders explanations on why data is gathered and how it will be used. It is important to acknowledge that for reasons of commercial and political sensitivity, it will not always be appropriate to give this information in high levels of detail.

Key performance indicators (KPIs) will be used to monitor the success of improvements that have been implemented. We will also use feedback results from previous years as a benchmark to monitor continued satisfaction and ensure that areas that we excel continue to grow.

How Do We Communicate the Results and Actions?

The Fund will provide feedback on how customer engagement data has been used in the most practical means, including:

- Our website, wmpfonline.com through a 'How did we do?' page
- In the Fund's annual report and accounts
- In annual electronic mailings/e-newsletters
- In letters inviting customers to attend customer journey mapping (CJM) sessions where we will provide examples of how we have used data in the past.

Officer Responsibilities

All Fund staff members are responsible for providing excellent service to the Fund's stakeholders. Front line members of staff will have additional customer service training in early 2015.



Pensions Administration Team Leaders with responsibility for Customer Services will ensure that, where appropriate, Pensions Administrators and Pensions Assistants on telephones or reception are requesting that members are assisted with completing the online surveys to ensure any process improvements are based on a proportional level of Fund membership.



Employer Support Officers will be responsible for ensuring that quarterly surveys are sent to all participating employers at the beginning of each reporting quarter.



The Communications Officer will ensure that employers are reminded to complete these surveys through quarterly articles in the *Employers' Briefing Note*.



The Trustee Management Officer will be responsible for the collection of feedback from Fund trustees.



The Communications Officer/Event Co-Ordinator will be responsible for the analysis of data, and the Head of Governance will present this to SMT at quarterly meetings.



SMT will be responsible for discussing the data and engaging with their teams to implement service improvements.



The Event Co-Ordinator will be responsible for identify potential CJM sessions / further qualitative information from actions discussed at SMT.



The Communications Officer will be responsible for presenting this information to all stakeholders through the appropriate channel as documented in the section above.

A Consistent Approach

The Fund has identified that employer and trustee feedback should be collected, analysed and acted upon, along with member data.

Quarterly feedback will be gathered through an online survey promoted through the Employer Support Officers and the *Employer Briefing Note* e-newsletter. Feedback will be gathered from trustees following each trustee training event, and will be continuously reviewed by the Trustee Management Officer, with the results will be presented at the next Committee meeting. Member feedback will continue to be analysed quarterly from the online and paper customer feedback surveys already in place.

Ownership of the Customer Engagement Strategy

This strategy is owned by the Head of Governance who manages the Communications, Marketing and Business Development functions of the Fund. The day-to-day management of this process has been delegated to the Communications Officer with support and advice from the Fund's Events Co-Ordinator, alongside stakeholders from across the business.

Strategy owner: Head of Governance

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West Midlands Pension Fund

PO Box 3948
Wolverhampton
WV1 1 XP
United Kingdom