

DEFINE YOUR SERVICES

In order to build a clear corporate pension proposition, you need to think about the services you may be looking for from a provider. To get you started, we've created a list of example services we believe are essential to design, implement and run an auto enrolment scheme. We've also given you some space to add any additional services you think would value.

When you come to use our services calculator, please tick the relevant boxes (provided / pot provided) and send it to us and we will provide a bespoke quote for you to work with, including the estimated time it will take to complete each task. If you wish to put your own time in for certain tasks then please feel free

DESIGN SERVICES

SERVICE

ACTIVITY

Planning	<input type="checkbox"/> Identify staging date <input type="checkbox"/> Set up project team <input type="checkbox"/> Create a plan <input type="checkbox"/> Educate project team about employer duties
Assess workforce	<input type="checkbox"/> Identify workers
Review current schemes	<input type="checkbox"/> Review existing scheme suitability
Model different options	<input type="checkbox"/> Decide if staging date should be brought forward/aligned <input type="checkbox"/> Decide if postponement is being used <input type="checkbox"/> Identify the pay reference period(s) <input type="checkbox"/> Decide if contractual enrolment will be used <input type="checkbox"/> Decide if salary exchange will be used <input type="checkbox"/> Decide if different contributions will be used for different employees <input type="checkbox"/> Decide on contribution design
Auto enrolment solution	<input type="checkbox"/> Investigate potential auto enrolment system solutions <input type="checkbox"/> Decide on auto enrolment system <input type="checkbox"/> Investigate potential pension scheme solutions
Default investment solution	<input type="checkbox"/> Investigate suitable default investment solutions <input type="checkbox"/> Design appropriate investment default <input type="checkbox"/> Provide scheme risk profile
Scheme governance solution	<input type="checkbox"/> Investigate potential governance solutions
Other services	<input type="checkbox"/> <input type="checkbox"/>

IMPLEMENTATION SERVICES

Transfer services	<input type="checkbox"/> Provide support on transfers into auto enrolment scheme
Create implementation plan	<input type="checkbox"/> Set up an implementation team <input type="checkbox"/> Create an implementation plan <input type="checkbox"/> Educate implementation team about employer duties
Communication design	<input type="checkbox"/> Define communication strategy <input type="checkbox"/> Produce communication for consultation <input type="checkbox"/> Produce awareness communications <input type="checkbox"/> Produce communications for fixed or enhanced protection <input type="checkbox"/> Produce pension scheme communications <input type="checkbox"/> Produce updated contracts

Engage workforce	<input type="checkbox"/> Deliver consultation communications <input type="checkbox"/> Carry out consultation <input type="checkbox"/> Deliver updated contracts <input type="checkbox"/> Deliver awareness communications <input type="checkbox"/> Deliver communications for fixed or enhanced protection <input type="checkbox"/> Deliver pension scheme communications
Process design	<input type="checkbox"/> Define staging process <input type="checkbox"/> Define joiner process <input type="checkbox"/> Define ongoing assessment process <input type="checkbox"/> Define postponement process <input type="checkbox"/> Define opt out process <input type="checkbox"/> Define opt in process <input type="checkbox"/> Define certification process <input type="checkbox"/> Define registration process <input type="checkbox"/> Define contribution process <input type="checkbox"/> Define change process
Implement auto enrolment changes	<input type="checkbox"/> Facilitate process session <input type="checkbox"/> Audit and cleanse data <input type="checkbox"/> Update payroll <input type="checkbox"/> Set up auto enrolment system <input type="checkbox"/> Update processes <input type="checkbox"/> Validate data files <input type="checkbox"/> Validate new processes <input type="checkbox"/> Set up Scottish Life scheme <input type="checkbox"/> Set up NEST scheme
Certification and registration	<input type="checkbox"/> Complete certification process <input type="checkbox"/> Complete registration process
Implement investment default	<input type="checkbox"/> Support provider in setting up scheme default
Implement scheme governance	<input type="checkbox"/> Support the implementation of the agreed governance process
Support of auto enrolment implementation	<input type="checkbox"/> Train scheme administrator on auto enrolment system <input type="checkbox"/> Support scheme administrator queries
Other services	<input type="checkbox"/> <input type="checkbox"/>
RUN SERVICES	
New entrant process	<input type="checkbox"/> Complete joiner process
Auto enrolment process	<input type="checkbox"/> All other activities for pension provider
Guided process	<input type="checkbox"/> Support scheme governance process <input type="checkbox"/> Review salary exchange
Keeping records	<input type="checkbox"/> Decide when to complete re-enrolment <input type="checkbox"/> Support re-enrolment <input type="checkbox"/> Support employer in their record keeping duties
NEST scheme	<input type="checkbox"/> All other activities for NEST scheme
Investment review	<input type="checkbox"/> Review fund performance on an annual basis <input type="checkbox"/> Review design of default <input type="checkbox"/> Review risk profile of scheme <input type="checkbox"/> Review suitability of default for scheme
Other services	<input type="checkbox"/> <input type="checkbox"/>