

PENSIONS ADMINISTRATION

Deliver important pension documents members can always find

A practical guide to choosing the right approach for pension communications throughout the member journey, from everyday messages and live benefit information to important documents members and pensioners may need to keep for years.

A COMPLETE APPROACH TO MEMBER DOCUMENTS

Different documents do different jobs

Pension administration systems, email and messaging, member portals and Documentd each serve a different purpose. The right choice depends on the job: administering benefits and member data, communicating, providing access and interaction, or permanently delivering an important document to the member. Using each in the right way creates a better member experience and reduces avoidable administration and support queries.



No single channel is right for every pension communication. Email works well for transient messages, member portals for live information and self-service, and Documentd for important documents that ought to become permanent, member-owned records.

PENSIONS ADMINISTRATION IN PRACTICE

Choose the right approach for each communication

Member portals are the right place for current pension information, projections, transactions and self-service. Email and messaging handle reminders and transient updates. Documentd is designed for important point-in-time documents members, deferred members and pensioners may need to retain throughout retirement and beyond. Using each appropriately gives members a clearer experience and helps reduce avoidable administration queries.

Email & messaging

COMMUNICATE

Best for reminders, updates and communications whose value is mainly immediate.

- Annual statement notifications
- Retirement reminders
- Requests for information
- Portal notifications
- Scheme and service updates

Member portal

ACCESS & INTERACT

The right place for current information, modelling, requests and self-service.

- Current benefit values
- Contribution history
- Retirement projections
- Personal detail changes
- Beneficiary nominations
- Retirement modelling

Documentd

DELIVER & RETAIN

For important point-in-time pension documents members should keep.

- Benefit statements
- Retirement option packs
- Transfer quotations
- Retirement confirmation documents
- Pension increase notices
- P60s and payment records



Important pension documents should stay with the member. Documentd delivers permanent, member-owned copies into each member's own private document home, where they remain easy to access and find again throughout retirement and beyond.

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SECURITY & TRUST

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