

# CASE STUDY:

## PENSION ADMINISTRATION



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Chartered Developments is recognised as a market leader in the Pension industry.



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The highly successful team, headed up by Rohan Hardeman, can call on years of experience of industry calling.



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For more information on how Chartered Developments could help you please call to speak to Rohan on 01392 247200

## CLIENT PROFILE

An award winning third party administrator which has been providing outsourced solutions for over 40 years to companies operating pension schemes of all kinds. The company looks after the pension requirements of over 200 clients and cares for over 600,000 members throughout their pension lifecycle.

## THE SERVICE

Co-sourcing and hosting, Data cleansing, Pensioner payroll, Scheme accounting, Scheme administration.

## THE BRIEF

The primary objectives were to gain deeper intelligence regarding prospects' buying and performance review processes and to arrange fully qualified introductory appointments with prospects that were no further than 12 months from the end of their existing third party administrator arrangements.

## THE TARGET

The client isolated a total of 300 initial target companies, each with a minimum of 3,500 members, irrespective of scheme type in operation. The client consulted with Chartered Developments regarding the condition of the target database stored within their Salesforce CRM system.

We segmented the data into three categories:

- Primary Decision Makers, consisting of: Chairman of Trustees; Pensions Director
- Technical Influencers, consisting of: Pensions Manager (only where the administration had already been outsourced); Human Resources Director; Chairman of Trustees
- Financial Influencers which may include all of the above, in addition to the Finance Director (or equivalent)

Prior to the commencement of the below campaign, Chartered Developments enriched the data within the client's CRM system with key information found to be in the public domain or sourced as a result of an initial research call to the company in question as appropriate

## THE CAMPAIGN

The agreed objectives of the calling campaign were to:

- a. Initiate dialogue with the identified decision maker (or influencer) to:
  - evaluate any existing awareness of the company and its services
  - discuss issues surrounding the relationship with their present third party scheme administrator
  - establish their review process and renewal date
  - identify any potential appetite to outsource any presently retained in-house administration function (appropriate decision maker only)
- b. Secure fully qualified meetings for the client with decision makers and influencers where appropriate. The prospect must be no further than 12 months from the end of any existing outsourced arrangement to ensure the initial meeting has real value.

## THE RESULTS

- 31 fully qualified appointments have been attended to date, almost doubling the client's expectation of 16 appointments within the agreed budget.
- The client's Salesforce CRM data has been substantially enriched as per the campaign objectives. (see a. above)

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