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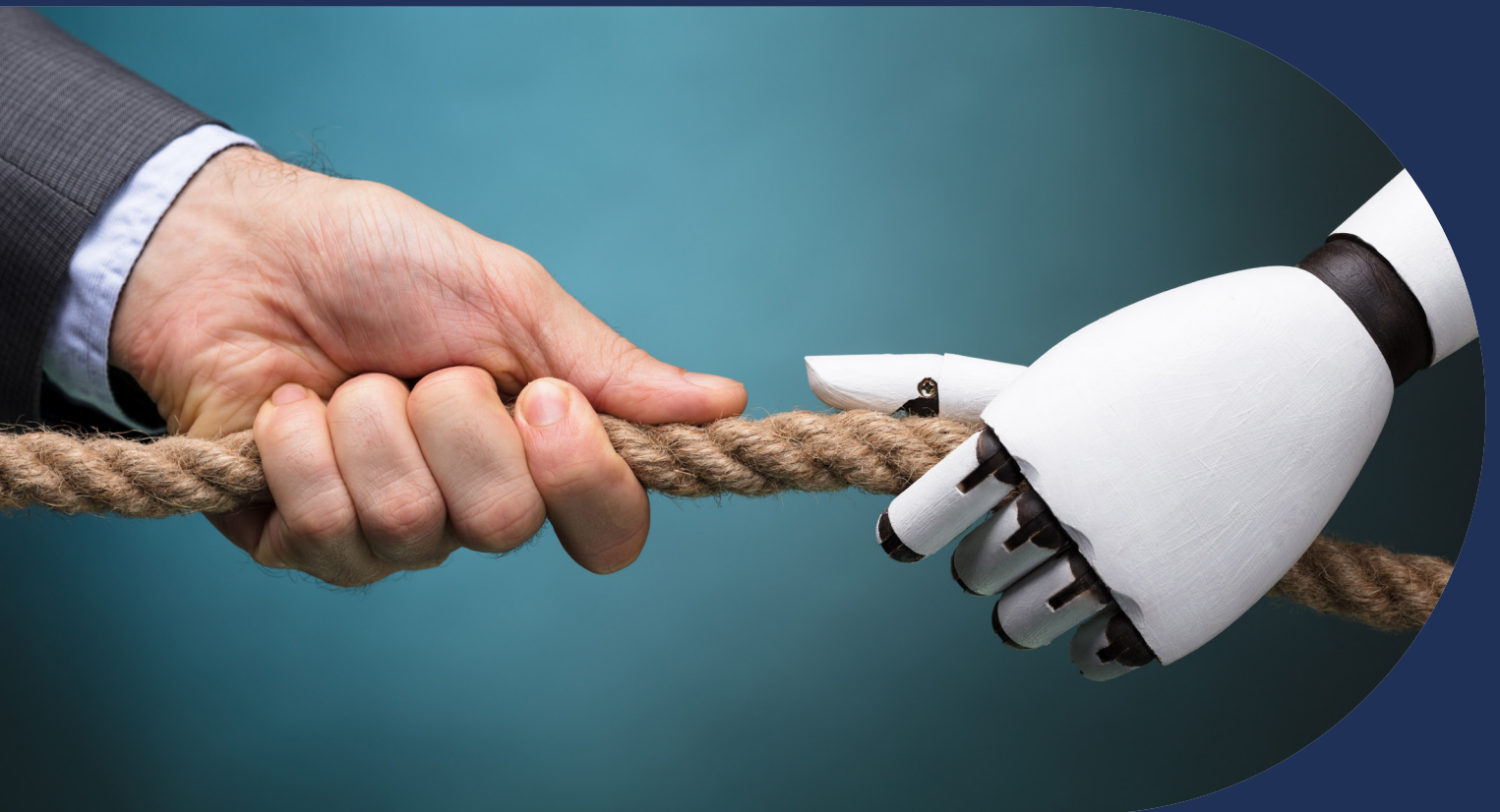
Automating admin: Turning days into hours

An in-depth look into how Lothian Pension Fund reduced manual processing time by 91 days and saved £9,500 with Heywood's workflow automation solutions.

About the Fund

Lothian Pension Fund

Lothian Pension Fund administers the Local Government Pension Scheme (LGPS) in Edinburgh and the Lothians.

They are an asset-backed and multi-employer scheme with around £10 billion of assets and the second largest LGPS fund in Scotland, serving 88,900 members and 56 active employers.

In March 2017, they became the first UK Local Government pension fund awarded accreditation for the Pensions Administration Standards Association and have held the Customer Service Excellence Award for over 10 years.

Heywood Pension Technologies

Heywood has successfully driven quality pension administration outcomes for almost 50 years. Our mission is to make pension management simple, seamless and stress-free.

Data and innovation drive our technology-enabled solutions; we aim to transform how members navigate their financial journeys and take pride in providing the necessary tools and knowledge to tackle industry challenges. Our emphasis on quality is the foundation of our success and the cornerstone of our commitment to the industry.

Today, our software plays a pivotal role in securing the financial futures of millions of people.

Background

Lothian Pension Fund have been a Heywood customer for a number of years, using the Altair platform to cover all aspects of pension administration.

During the process of reviewing and standardising processes, the fund were aware that they had not adopted automation to help achieve their goals, but were unsure where they should start.

They wanted to remove smaller, time-consuming and repetitive activities and ensure that their time and resources focused on:

- **Allowing staff to concentrate on complex processes and calculations**
- **Reducing backlogs**
- **Providing better customer service to help and guide members**
- **Meeting increasing legislative demands**

Lothian sought Heywood's expertise to optimise their processes and take away the thinking required to implement changes, rather than trying to work around the system.
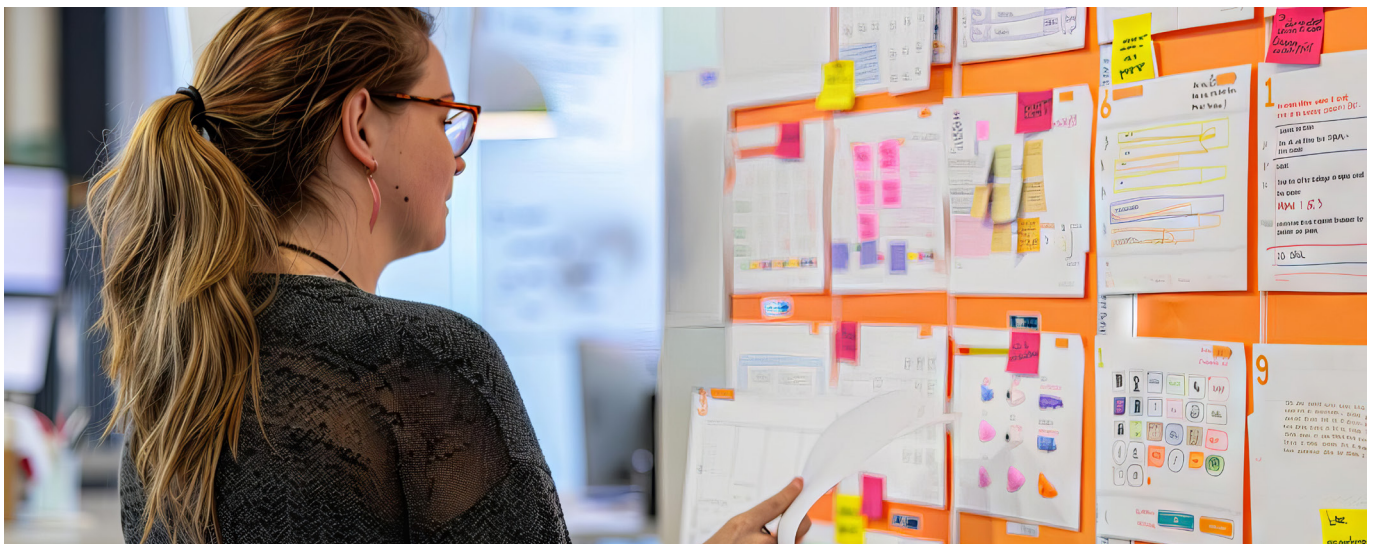
An iterative approach

Heywood employ a collaborative approach to automating processes, working with customers to provide options that benefit their needs and resources.

Lothian worked with Heywood iteratively, where the fund added and used new features, providing feedback along the way. Heywood created more elements to adopt, such as complex addresses, activation key statuses and criteria moved into events. Using the customer 'Aha!' ideas portal, seven customer ideas were included in a recent quarterly Altair release, with more scheduled to follow.

A sense of trust was built during the process, as Lothian could identify improvements at a manageable pace, before adding more automated features.

Processes Lothian wanted to automate included:

- **Tenements addresses**
- **Member activation keys**
- **Communication methods**

Project steps

On-site visit
to observe administrators and their work

Process optimisation
to review and recommend new, tailored processes

Testing cycle
to test processes and capture exceptions

Live roll-out
and communication to support Lothian's team

As part of **process optimisation**, Heywood encouraged Lothian to take a step back and think about the information they had, their desired outcomes and to consider processes holistically, rather than a box ticking exercise.

The goal of 'sending communications' was changed to '**ensure that communications are received in a timely manner**'. As a result, communications were automated across all processes to save time, with other processes retained as manual activities. The iterative approach ensured Lothian were comfortable with and understood each change.

The process optimisation stage asked Lothian to assess practices from a different perspective and confirm that they were useful and delivered value. In one instance, ending a manual process that involved 400 individual lines of data resulted in **100 hours of time saved per year**.
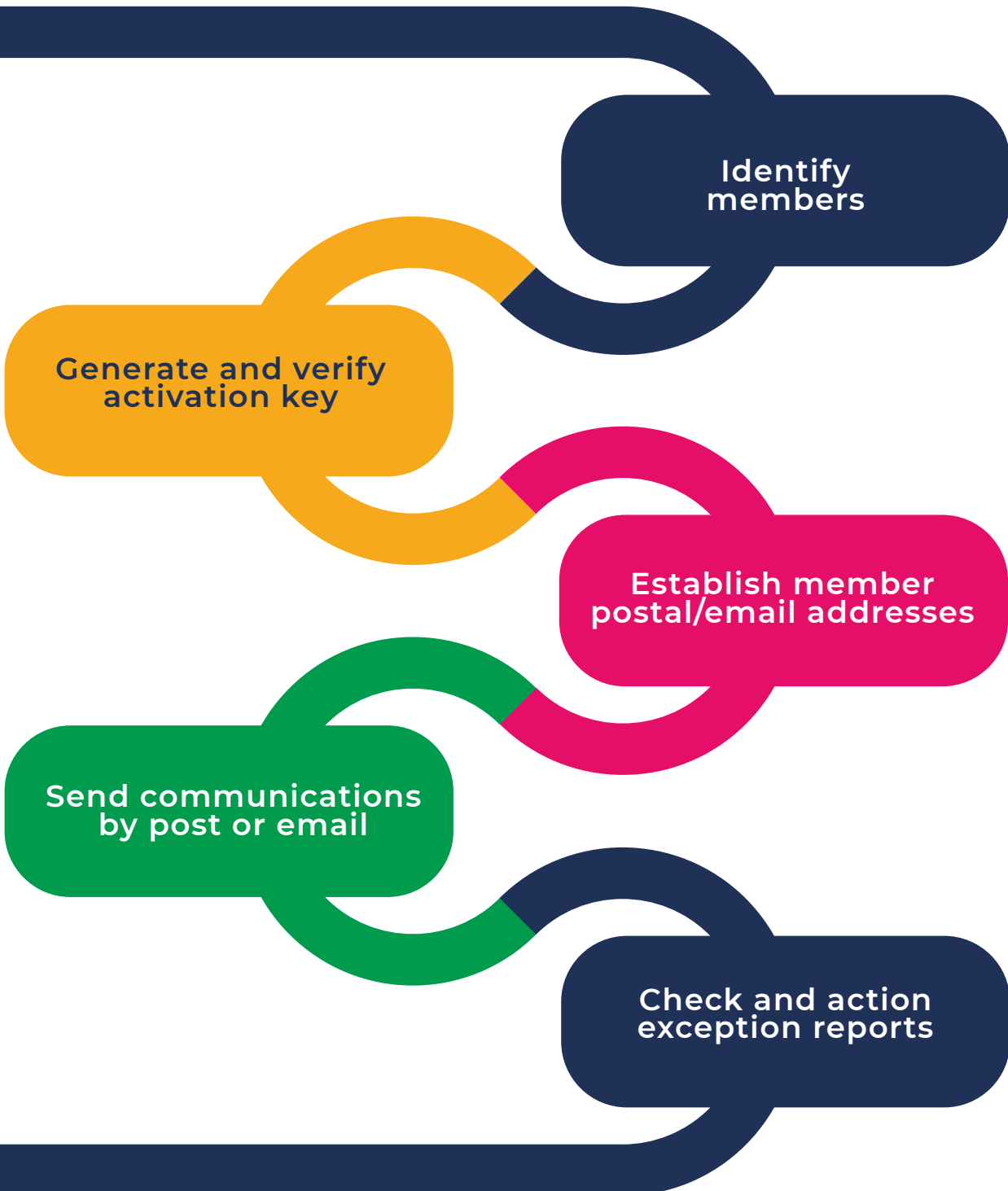
Lothian's goal was to work on 'admin by exception', focusing on automating 99% of activities and devoting time to the 1% of 'hands-on' cases.

New starter processing

An example of just one of Lothian Pension Fund's fully automated and optimised, end-to-end daily processes.

Identify members

Generate and verify activation key

Establish member postal/email addresses

Send communications by post or email

Check and action exception reports

Immediate benefits

Saving time and money

Lothian realised immediate benefits from the new automated processes by implementing a check for email addresses appended to member records.

The check allowed the fund to reduce postal communications by **72%**, saving over **£9,500** in post for Deferred Benefit Statements in the first year.

Similar benefits were appreciated by adopting the new starter process, which previously took over 830 admin hours prior to automation. The new process represents an **88% reduction** in process time, or **91 days**.

"Automation has opened so many opportunities for use in other processes, bringing efficiencies for time and cost savings.

The new starter process is now taking 2 hours per week where it had previously taken 2 days."

Lothian Pension Fund

How we can help you

A snapshot of other Heywood-automated processes

Actives approaching age 75

Annual Benefit Statements

Data cleanse

Deferred benefit process

Mortality screening

Payments - authorisations

Payroll adjustment reminders

Retirements

Simple refund

Heywood have introduced flexible support arrangements for customers to meet the needs of each fund; from full end-to-end support, to workflow training, written guides and hosted virtual drop-in clinics.

All options provide best practice tips for funds, before building or managing exception processes.

Customers have the option to implement changes or identify any support required, ranging from optimising processes, reconfiguring workflows and setting up new automations.

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Heywood's automated solutions

Have you ever felt like it is almost too hard to get things done? Is your work dominated by multiple spreadsheets? Do you check information in one place only to have to cross reference it or check somewhere else?

Good automation and workflow can dramatically reduce the amount of time you need to spend on predictable and repetitive administration tasks.

If you ever feel like your job should be easier, we can help.
Old problems | New solutions | Pensions perfected

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