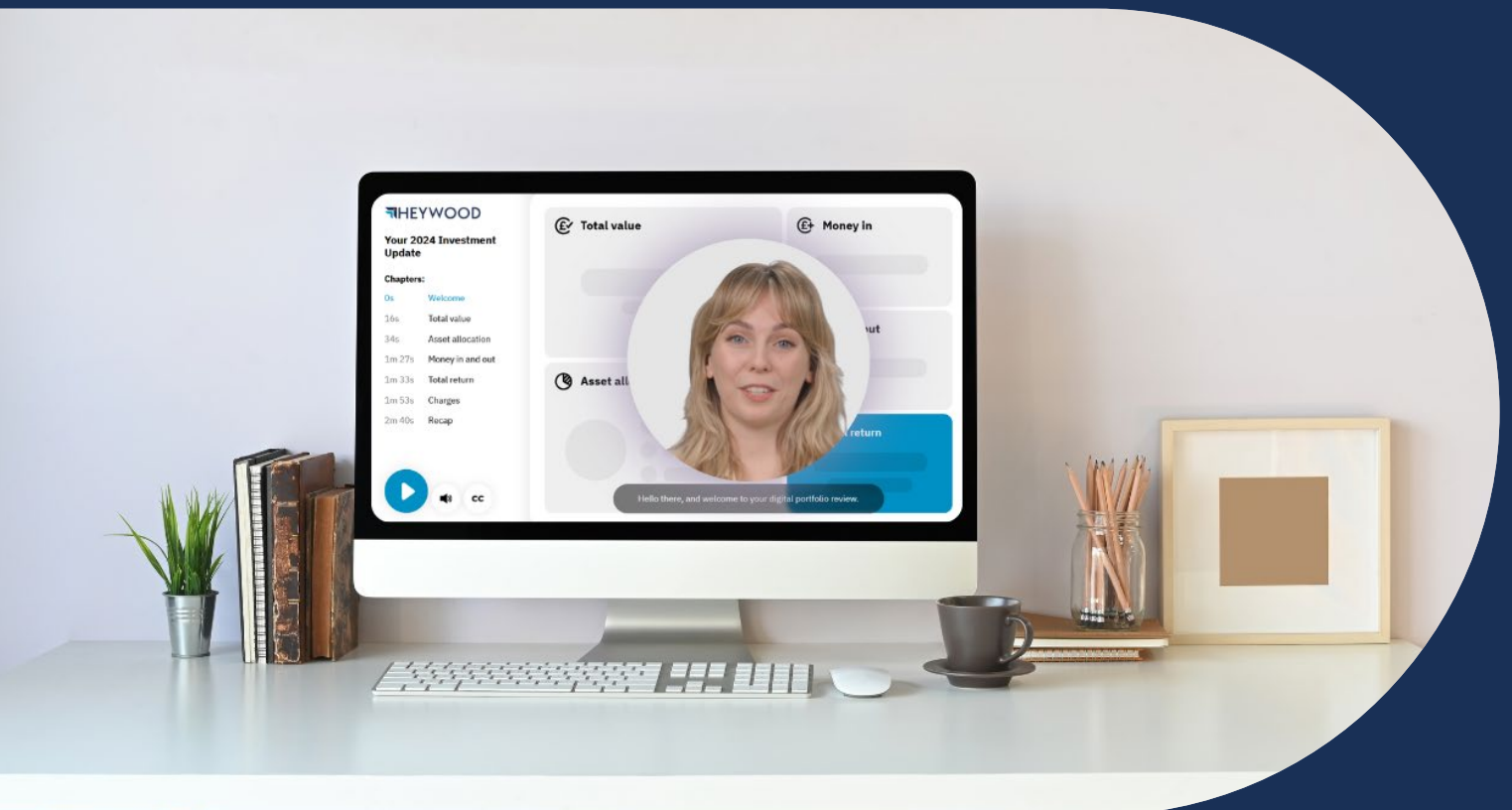


Case study



# Increasing member engagement by 80% with personalised video



A case study on how the North East Scotland Pension Fund increased annual benefit statement engagement by 80% with Heywood Video Engage's personalised member content.



Increasing member engagement by 80%

# About us



## North East Scotland Pension Fund

The North East Scotland Pension Fund ('NESPF') is one of the largest Local Government Pension Schemes in Scotland, looking after 78,000 members and assets worth over £6.2bn.

NESPF administers the Fund for employees of Aberdeen City Council, Aberdeenshire Council and The Moray Council as well as around 40 other public or charitable bodies.



## Heywood

Heywood has successfully driven quality pension administration outcomes for 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.

Increasing member engagement by 80%

# Dynamic engagement

## Engagement, reimagined

Engaging with pension plan members has historically been a difficult task. The often one-way process has been dominated by costly mail communications, with limited evidence of impacts on member decision-making.

**Things are changing and it just got personal.**

Heywood Video Engage is an interactive and personalised tool that simplifies complex financial information to engage members like never before.

### Educate

AI 'avatars' present personalised information using plain language

### Provide

Members can view anytime, anywhere, on any device

### Engage

Provide multiple languages and accessibility features

"Everyone is overwhelmed with info and it can be a battle to get members' eyes on things. The mention of pensions can often put people off – it's a daunting subject to some and Video Engage has made it more approachable."

**North East Scotland Pension Fund**

Increasing member engagement by 80%

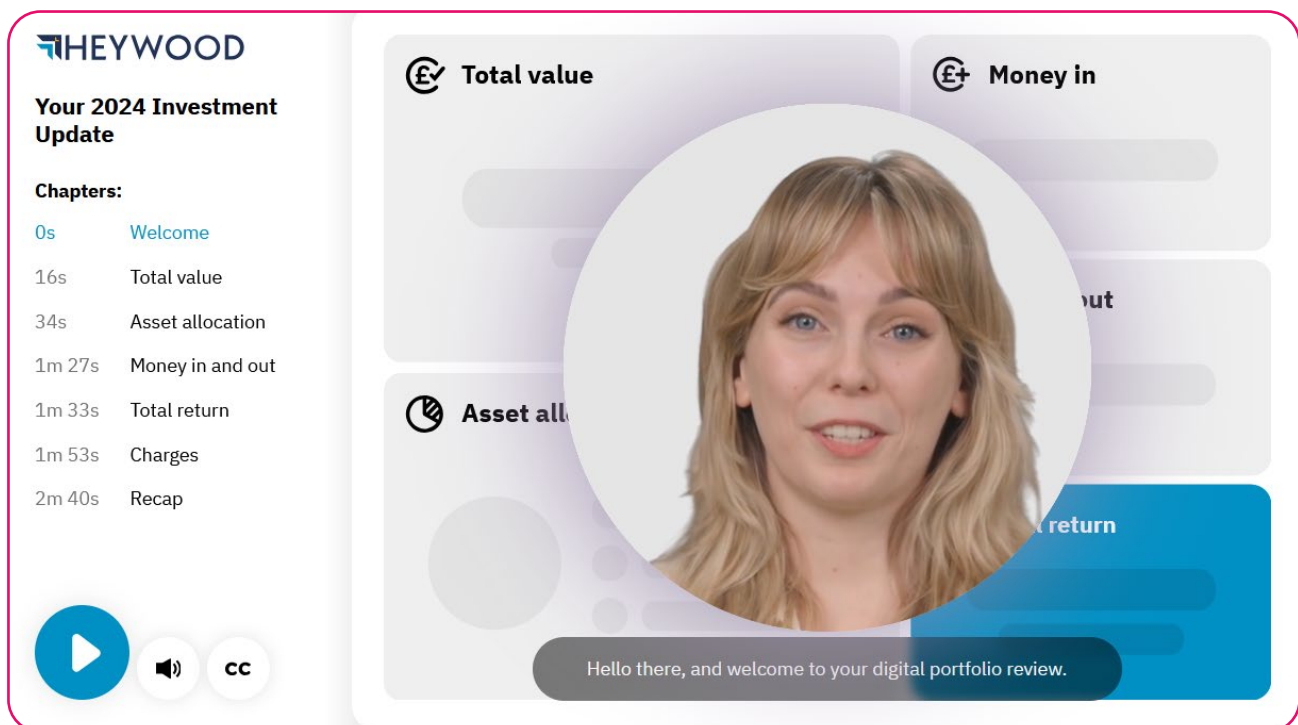
# A video first

“There was a big push for us to move to **digital first comms strategy**, which is part of why we took the service.

It was also an acknowledgement of preferences – **people consume information in different ways** and video is a growing form of content.”

“The video was brilliant, explains everything in simple terms, brings up all the figures I need and is just easier to understand.”

- Pension plan member



Video Engage welcome dashboard

Increasing member engagement by 80%

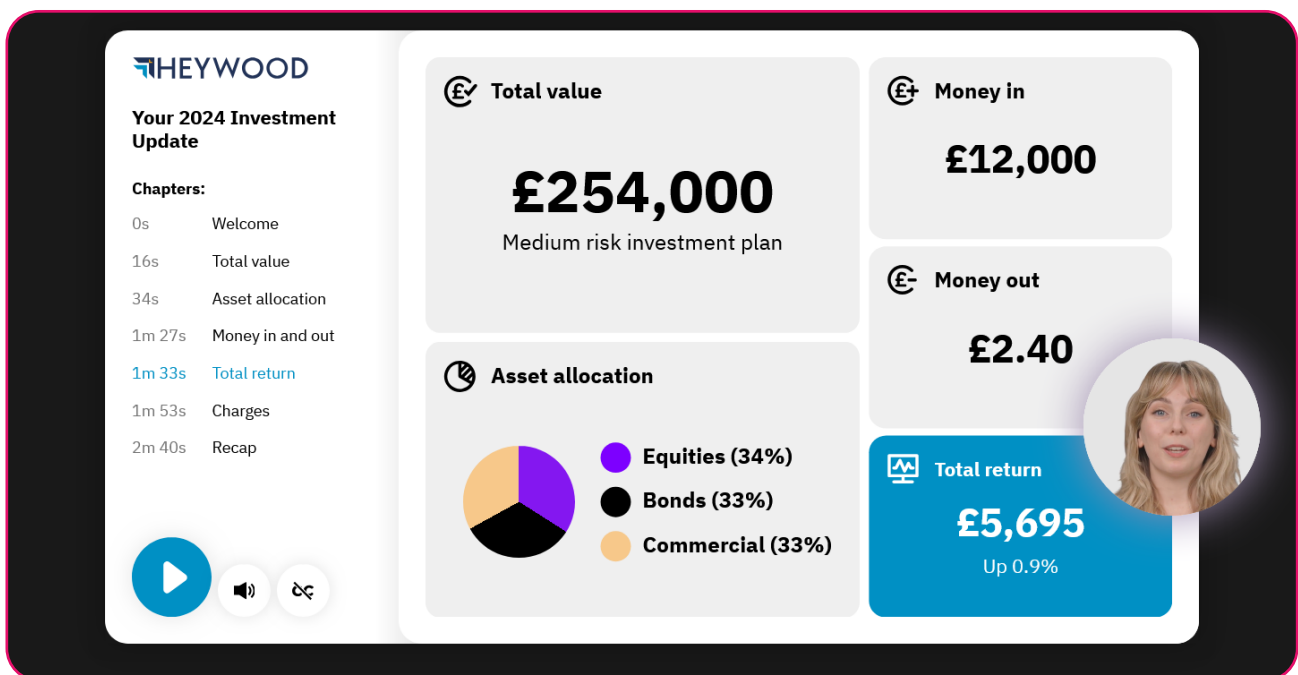
# Approachable pensions

“Everyone is overwhelmed with information and it can be a battle to get members’ eyes on things.

**The mention of pensions can often put people off – it’s a daunting subject to some and Video Engage has made it more approachable.**

We were previously dictating how people consume their information – with longwinded documents or letters.

Now, people have a two-minute overview of their situation and what they will get out of retirement.”



Clear values of investments

Increasing member engagement by 80%

# Increased performance

**HEYWOOD**

**Your 2024 Investment Update**

**Chapters:**

- 0s Welcome
- 16s Total value
- 34s Asset allocation
- 1m 27s Money in and out
- 1m 33s Total return
- 1m 53s **Charges**
- 2m 40s Recap

**Total fees paid: £456.22**

<b>Platform</b> <b>£200</b>	<b>Fund manager</b> <b>£200</b>	<b>Adviser</b> <b>£56.22</b>
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Simple breakdowns of fees that are easy to comprehend

**“Post-launch, we saw a marked reduction in the number of queries** we received – we feel like it answers questions and we can confidently direct people to their benefit statements.

The queries we now receive from members are less about statements and **more about taking action.**

There was an **80% increase in engagement rates** for our active ABS.

This is **comparing ABS performance** for our active members in 2022, where users had to download a statement that had been generated on their online account versus when we had the new ABS screen and video.”

Increasing member engagement by 80%

# Simple and accessible

“People appreciate that video is a succinct, easy to understand, and gives key information, in a medium that best suits them.

Video Engage is tailored, simple and accessible. It’s very structured, so members can look at as much or little as they want, to get a good overview of their pension”

- North East Scotland Pension Fund

**THEYWOOD**

**Your 2024 Investment Update**

**Chapters:**

0s	Welcome
16s	Total value
34s	Asset allocation
1m 27s	Money in and out
1m 33s	Total return
1m 53s	Charges
2m 40s	Recap


**Drag from the following words to complete the statements below**


spreading    contact

✓ Our approach to investing is designed for **long** term investment.

✓ Amounts included in this video are quoted **after** charges have been deducted.

🗨️ We manage risks by  our investments.





Interactive quiz to check understanding of information provided



## Heywood Video Engage

Engaging with pension plan members has historically been a difficult task. The often one-way process has been dominated by costly mail communications, with limited evidence of the impact of capturing member attention or impact on member decision-making.

Things are changing and it just got personal.

Heywood's 'Video Engage' is an interactive and personalised tool that simplifies complex financial information to engage members like never before.

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