



Administrators /

Good member outcomes stem from a fluid administration infrastructure often reflected through good systems and earnest processes. However, systems alone cannot revolutionise productivity, as correctly skilled people and intelligent deployment of resources hold the key to swifter operations.

Proposition overview

- ▶ **Data quality and risk assessments**
- ▶ **Automation and review of processes**
- ▶ **Systems build, development and support**
- ▶ **Data migrations and legacy system upgrades**
- ▶ **Back office administration support**

ITM believe that good member administration is mastered through a combination of people and systems, especially in a industry blighted with change. In particular, ITM advise third party administrators who manage a range of schemes, wealth managers who oversee individual policies, and other organisations responsible for a portfolio of insured schemes.

How ITM help administrators

Project based or one off assignments may include:

- ▶ Administration consulting
- ▶ Data and benefit risk auditing and cleansing
- ▶ Data migration and new client implementation
- ▶ System coding and implementation support
- ▶ GMP review and benefit rectification
- ▶ Process and procedure review
- ▶ On site additional resource – balancing BAU against need for project delivery

Contractual and long term partnerships

- ▶ Administration systems and ongoing support
- ▶ Outsourced back office administration
- ▶ Software build and support
- ▶ Technical and legislative advice

Key to the partnership's success is the ability to provide a flexible fee and cost structure that fits in with the aims of clients. ITM can work in partnership on a strategic level to ensure that clients can plan not only for the long term, but also address any short term requirements.

ITM's out (co)-sourced back office support service gives administrators the flexibility and assurance to maintain excellence of service for IT support and onboarding of new clients, whilst providing certainty around costs and resources.

Case study / Actuarial consultants

Pension administration system development and resource outsourcing

- ▶ **Specialist pensions advisory**
- ▶ **Bespoke administration platform**
- ▶ **Ongoing technical support**
- ▶ **Resource services**
- ▶ **Legacy scheme migration**
- ▶ **Project outsourcing**
- ▶ **32 staff transferred to ITM offices**

Solution delivered...

ITM were appointed to advise on how best to manage the development and support of the client's current administration system. It became evident that this partnership could be further enhanced if the entire project was outsourced ITM. This activity included:

- ▶ **Planning/implementation project management**
- ▶ **Software architecture and development**
- ▶ **Dedicated resources and user helpdesk**

In addition, ITM agreed to migrate schemes already on legacy systems to the new system, known as *PenScope*. As a result 32 staff transferred to ITM's managed services office in Guildford. Several years on the client believes the partnership has been an overwhelming success.

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Call Lisa Orme on **07720 091 572**
or email **lisaorme@itmlimited.com**
to find out more.

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PenScope

// PenScope is a market leading, browser-based pensions administration system for inhouse departments and third party providers, delivering all required functionality for DB, DC, CARE and hybrid scheme administration. PenScope also offers secure internet access for members, company contacts and trustees, integrated seamlessly with your existing websites. //