

CUSTOMER ENGAGEMENT PLAN 2022/23

	January 2022	February 2022	March 2022	April 2022	May 2022	June 2022	July 2022	August 2022	September 2022	October 2022	November 2022	December 2022	January 2023	February 2023	March 2023		
Employer		1. McCloud 2020/21 data submission deadline	1. Quarterly Employer Brief 2. Employer Peer Group 3. Year -End requirements issued 4. March FTE accuracy campaign	1. Employer Covenant questionnaires	1. Accounting Disclosure Year-End 31 March	1. Quarterly Employer Brief 2. Employer Peer Group		1. ABS Communications	1. Accounting Disclosure Year-End 31 July 2. Employer Peer Group 3. Quarterly Employer Brief	1. Accounting Disclosure Year-End 31 August 2. McCloud Data Collection deadline	1. Annual General Meeting	1. Quarterly Employer Brief 2. Employer Peer Group	1. Employer Survey	1. Year-End requirements issued	1. Employer Peer Group 2. Quarterly Employer Brief 3. Year-End requirements issued		
	McCloud Data Collection Support				2022 Actuarial Valuation												
				Employer Health Checks											FSS Consultation		
										Employer Webinars							PSD Payment Reminders
										Face-to-Face Employer Coaching							
Member (active)	1. Pre-Retirement Workshops 2. Providing Outreach Support to Members Who Cannot Attend Large Events at District Locations 3. Virtual Roadshows 4. Retirement Planning Campaign	1. Pre-Retirement Workshops 2. Providing Outreach Support to Members Who Cannot Attend Large Events at District Locations 3. Retirement Planning Campaign	1. Pre-Retirement Workshops 2. Retirement Planning Campaign 3. Providing Outreach Support to Members Who Cannot Attend Large Events at District Locations 4. Depot Roadshows	1. Pre-Retirement Workshops 2. Retirement Planning Campaign 3. Providing Outreach Support to Members Who Cannot Attend Large Events at District Locations 4. Pension Scam Awareness 5. School/Academy Roadshows	1. Pre-Retirement Workshops 2. Retirement Planning Campaign 3. Providing Outreach Support to Members Who Cannot Attend Large Events at District Locations 4. Targeting New Starters to Join Webinars	1. Retirement Planning Campaign 2. Pre-Retirement Workshops 3. Providing Outreach Support to Members Who Cannot Attend Large Events at District Locations 4. Pru to Send 2021 Annual Statements to Members Which Have Been Delayed	1. Retirement Planning Campaign 2. Pre-Retirement Workshops 3. Providing Outreach Support to Members Who Cannot Attend Large Events at District Locations 4. College and University Roadshows	1. Annual Benefit Statements 2. Retirement Planning Campaign	1. District Roadshow 2. ABS Email Notification 3. Pre-Retirement Workshops 4. Retirement Planning Campaign 5. Pension Saving Statements	1. Pre-Retirement Workshops 2. Member Intention Survey 3. Depot Roadshows 4. Retirement Planning Campaign 5. Active Engagement Forum 6. Pension Saving Statements	1. Pensions Tax 2. Pre-Retirement Workshops 3. Active Newsletter 4. Retirement Planning Campaign 5. CWC Unpaid Leave Promo	1. Pensions Portal 2. Pre-Retirement Workshops 3. Christmas Card 4. Retirement Planning Campaign	1. Pre-Retirement Workshops 2. Retirement Planning Campaign	1. Pre-Retirement Workshops 2. Retirement Planning Campaign	1. Depot Roadshows 2. Pre-Retirement Workshops 3. Retirement Planning Campaign		
	Presentations/One-to-One Consultations/Drop-in Surgeries and Marketplace Events, Post-Event Surveys, Webinars																
Member (deferred)	1. Target ID Verification		1. Depot Roadshows 2. Age 55 Campaign – Pre-Retirement Presentation	1. Deferred Webinars 2. Age 55 Campaign – Pre-Retirement Presentation	1. AVC Statements 2. Age 55 Campaign – Pre-Retirement Presentation	1. Deferred Benefit Statement (DBS) 2. DBS Email Notification 3. Age 55 Campaign – Pre-Retirement Presentation	1. Age 55 Campaign – Pre-Retirement Presentation	1. Deferred Newsletter 2. Deferred Webinars 3. Age 55 Campaign – Pre-Retirement Presentation	1. District Roadshow 2. Age 55 Campaign – Pre-Retirement Presentation 3. Pensions Portal Prize Draw 4. Pre-Retirement Workshop	1. Age 55 Campaign – Pre-Retirement Presentation 2. Deferred Engagement Forum	1. Pensions Tax 2. Age 55 Campaign – Pre-Retirement Presentation	1. Christmas Card 2. Age 55 Campaign – Pre-Retirement Presentation 3. Pre-Retirement Workshops 4. Age 55 Campaign – Pre-Retirement Presentation	1. Pensions Tax 2. Pensions Portal 3. Pre-Retirement Workshops 4. Age 55 Campaign – Pre-Retirement Presentation	1. Pensions Portal 2. Pre-Retirement Workshops 3. Age 55 Campaign – Pre-Retirement Presentation	1. Depot Roadshows 2. Pensions Portal 3. Pre-Retirement Workshops 4. Age 55 Campaign – Pre-Retirement Presentation		
	Presentations/One-to-One Consultations/Drop-in Surgeries and Marketplace Events, Post-Event Surveys, Webinars																
	Planned Portal Upgrade - Deferred Retire Online																
Member (pensioner)			1. Quarterly and Annual Payslips/P60s Issued 2. Pensioner Newsletter 3. Bulk Pensioner Mailing - Your Pension is Safe, We Hope You Are Too.	1. Monthly Payslips/P60s Issued 2. Pensioner Newsletter	1. Tea & Teach Events	1. Quarterly Payslips Issued 2. Tea & Teach Events			1. District Roadshow 2. Pensions Portal Prize Draw 3. Quarterly Payslips Issued	1. Pensioner Engagement Forum 2. Target Overseas Tracing		1. Quarterly Payslips Issued 2. Christmas Card			1. Pensioner Newsletter 2. Quarterly Payslips Issued		
	Planned Website Upgrade																
	Monthly Payslips																
Presentations/One-to-One Consultations/Drop-in Surgeries and Marketplace Events, Post-Event Surveys, Webinars																	
Pensions Committee/Board	1. Pensions Board Meeting		1. Pensions Committee			1. Pensions Committee 2. Induction Training	1. Employer Mid-Year Review 2. Pensions Board		1. Pensions Committee	1. Pensions Board	1. Annual General Meeting	1. Pensions Committee	1. Pensions Board Meeting		1. Pensions Committee		
	Weekly Briefings to the Chair by the Director/Assistant Director																
		Training events								Training events				Training events			