

## Appendix 2

# Customer Engagement Plan 2018

Employer	Employer Peer Group Employer coaching session	Employer coaching session Employer Briefing Note  Launch Customer Engagement Strategy 2018	Employer Peer Group  Engage employers to promote benefit statements on Portal	Employer survey results, actions and improvements published  Employer Briefing Note	Employer Peer Group Issue accounting disclosure for employers with year ending 31 March  Mid Year Review	Employer Briefing Note
Member (active)	Prize draw for web portal registrations Member satisfaction results published Reminder to access benefit statements on portal	AVC events	Main depot roadshow	Main depot roadshow Prize draw for web portal registrations Member satisfaction results published	Education site roadshow	Education site roadshow AVC summer events
Member (deferred)	Prize draw for web portal registrations Member satisfaction results published Reminder to access benefit statements on Portal	AVC events	Main depot roadshow	Main depot roadshow Prize draw for web portal registrations Member satisfaction results published	Education site roadshow	Deferred benefit statements available on web portal Education site roadshow AVC summer events
Member (pensioner)	Prize draw for web portal registrations Member satisfaction results published Reminder to access to benefit statements on Portal	AVC events	Quarterly and annually paid pensioner payslips, newsletter and P60s issued Main depot roadshow events	Monthly paid pensioner newsletter and P60s issued Main depot roadshow Prize draw for web portal registrations Member satisfaction results published	Education site roadshow	Quarterly payslips issued Education site roadshow AVC summer events Reminder to access P60 on Portal
Trustees/ Pension Board	Media Roundup 23 January: Pensions Board meeting	Media Roundup 20 February Shareholder Forum (LGPS Central)	Media Roundup Pooling update 28 March: Pensions Committee	Media Roundup External investment training Satisfaction results published	Media Roundup  Mid Year Review	Media Roundup  Trustee and Pensions Board induction 25 June: Pensions Committee

January February March April May June

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Employer	Employer Peer Group Employer coaching session	Employer Briefing Note	Employer coaching session Issue accounting disclosure to employers with year end 31 July	Employer Briefing Note Issue accounting disclosure to employers with year end 31 August	Annual general meeting Employer Peer Group Employer coaching session Employer satisfaction survey circulated	Employer Briefing Note
Member (active)	Education site roadshow AVC summer events AVC statements sent to members by Prudential Prize draw for web portal registrations Member satisfaction results published	Annual benefit statements available on web portal Web portal workshops	Civic roadshow events	Civic roadshow events AVC autumn events Prize draw for web portal registrations Member satisfaction results published		
Member (deferred)	Education site roadshow AVC summer events Prize draw for web portal registrations Member satisfaction results published	Web portal workshops	Civic roadshow events	Civic roadshow events AVC autumn events Prize draw for web portal registrations Member satisfaction results published		
Member (pensioner)	Education site roadshow AVC summer events Prize draw for web portal registrations Member satisfaction results published	Web portal workshops	Overseas pension confirmation distributed Civic roadshow events Quarterly payslips issued	Civic roadshow events AVC autumn events Prize draw for web portal registrations Member satisfaction results published		Quarterly payslips issued
Trustees/ Pension Board	Media Roundup 3 July: Pensions Board July: Trustee training Training needs analysis Member satisfaction results published	Media Roundup	Media Roundup 5 September: Pensions Committee	Media Roundup Satisfaction results published	Media Roundup Annual general meeting	Media Roundup 12 December: Pensions Committee