

# Pension Administration Benchmarking Service

Measure • Compare • Learn • Improve • Validate

## How Our Clients Use The Service

### Demonstrate Value for Money to your Stakeholders

Demonstrate to your Board and key stakeholders that your pension administration costs, staffing levels and the service you provide members are reasonable and providing value. Clients often cite their service score and cost benchmarking results in their annual reports.

### Improve Member and Employer Service

Many clients realize substantial improvements in their service scores over multi-year periods by targeting new improvements each year.

### Optimize Costs and Staffing Levels

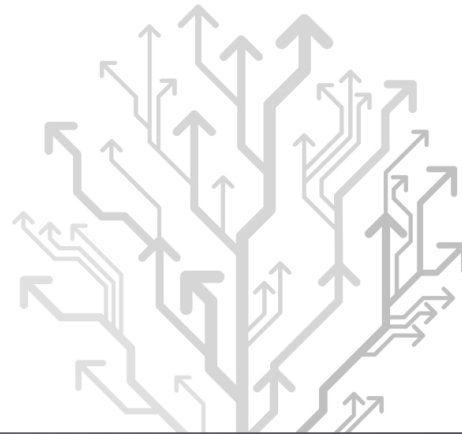
Several clients have used their analysis to support their business case for increased budgets or staffing levels.

### Make Better Decisions

Leverage global industry expertise by connecting with like-minded peers.

### Save Time by Learning from your Peers

Use the best practice research to jump start your initiatives.



## How It Works



### Measure

The service metrics and the activity cost and staffing model have been developed over 20 years based on client input into what they find useful and important.



### Improve

Insights gained from your report, global conference and best practice research can be used to improve your service, how you do things and optimize your staffing level and costs.



### Compare

You get a comprehensive benchmarking report that compares your service levels, costs, volumes and staffing levels in total and by pension activity to a peer group customized for you and the global universe.

### Learn

Understand where and why you are different from your peers. Share ideas at the global peer conference and via the online peer intelligence network. Learn from annual best practice research into areas such as social media, going paperless and client experience surveying.

## Unique Global Pension Administration Database

77 administrators, 50 million members, 2 million employers

Activities	Service Levels	Costs	FTE	Activity Volumes
Contact Center	✓	✓	✓	✓
Website	✓	✓	✓	✓
Counseling	✓	✓	✓	✓
Presentations	✓	✓	✓	✓

Pension Payments	✓	✓	✓	✓
Pension Inceptions	✓	✓	✓	✓
Service to Employers	✓	✓	✓	✓
Information Technology		✓	✓	
Governance		✓	✓	
Other Back-Office Support		✓	✓	

## The Service Includes Annual Research

Past topics include:

- Cybersecurity - Preventing Financial Fraud
- Economies of Scale in Pension Administration
- Social Media - What are your peers doing?
- Social Media - Case studies
- Call center best practices
- Employer service
- IT modernization: Agile implementation case study
- IT modernization: Portfolio, program and project management
- IT modernization: Change leadership and change management
- Pension communication ideas and best practices
- Dashboards
- Telecommuting
- Mobile apps
- Satisfaction surveying
- Increasing online adoption

*Contact us for more details*

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