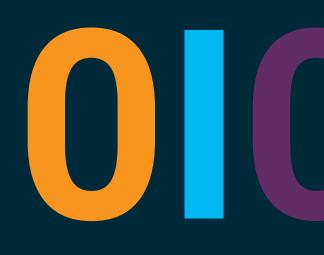# PENSION DATA IMPROVEMENT PLAN

Data accuracy will be vital for contact verification and matching in the Pensions Dashboard ecosystem.

If your role involves collecting and updating data for pensions administration, now is the time to audit your contact records.

## Getting started

This sample plan outlines a structured approach to help you with data improvement.

### 1. CONDUCT A MEMBERS' DATA AUDIT

- Identify missing, incomplete, or inaccurate data. Prioritise data needed by Dashboards: such as NI number, date of birth, names and addresses

- Include digital data to help with verification: email addresses and mobile numbers

- Consider validating key details against government databases (e.g. NI verification)

- Ensure all records include unique identifiers to help link pension records correctly

- Ensure all records follow a uniform format for names, addresses, and key identifiers.

### 2. UPDATE MEMBERS' RECORDS

- Address inconsistencies found during the audit: including correcting/removing any duplicate or erroneous records

- Implement automated checks to flag future inconsistencies

- Schedule regular data reviews to reduce data deterioration. Working with partners such as Datagraphic to schedule timely annual updates to recheck contact information.

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### NEED HELP WITH DATA CLEANSING?

Datagraphic can prepare and send your data cleansing mailings. We can include personalised pre-populated forms to standardise data formats and drive response rates, and use digital and reply paid envelope options to make it easy for all your contacts to reply.

### NEED HELP WITH DATA ENTRY?

Datagraphic can receive your digital and physical mailing replies. We'll open, scan and capture reply data, supplying you with clean data back in a digital format for import into your existing systems

## 3. CONTINUOUS DATA IMPROVEMENT

- To maintain data quality, provide guidance to data entry teams on the importance of capturing accurate pension contact data continuously.

- Regularly remind members to contact you when their details change using messages and graphics on digital and postal communications

- Leverage technology for data management. Signpost members to self-service options online where they can review and update data.

- Use automation tools to flag and rectify data discrepancies.

- Consider assign a team member as your dedicated data steward to oversee data quality.

- Maintain documentation on data improvements as evidence of ongoing compliance with regulatory requirements

- Report on data quality improvements to stakeholders to gain their buy-in for on-going projects to maintain data quality.

### YOUR NEXT STEPS SUMMARY ...

- ☑ Conduct a data audit
- ☑ Implement data cleansing measures
- ☑ Engage with staff & members to maintain data accuracy
- ☑ Monitor and review data regularly

By taking steps now, you can ensure data accuracy and enhance the overall member experience when Pensions Dashboards go live.

## Conclusion

Improving pension member data is a critical step towards ensuring a smooth connection to the UK Pensions Dashboards ecosystem. By following a structured plan like the one in this example, you can enhance data accuracy, streamline future member access to their vital pensions information and comply with ecosystem requirements.

# Need help to cleanse your key contact data?

Please contact our team to learn more:

T: +44 (0)1246 543000  |  E: ask@datagraphic.co.uk | W: datagraphic.co.uk

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