

# CUSTOMER ENGAGEMENT PLAN 2019/20

	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March
Employer	Employer coaching session	Employer Peer Group Year-end requirements issued	Employer coaching session (academies only)	Scheduled to launch Customer Engagement Strategy 2019	Accounting disclosure year-end 31 March	Employer coaching session	Employer Mid-Year Review	Employer coaching session	Accounting disclosure year-end 31 July	Accounting disclosure year-end 31 July	Employer coaching session	Employer Brief	Employer coaching session	Employer Peer Group Year-end requirements issued	Employer coaching session
	Employer survey	Year-end requirements issued	Employer Brief	Employer Brief	Employer Peer Group	Employer Brief	Employer coaching session (payroll providers)	Employer survey	Employer Peer Group	Employer Peer Group	Employer Peer Group	FSS consultation	Employer survey	Year-end requirements issued	Employer coaching session
Review of Funding Strategy Statement (FSS)															
Valuation data collection and cleansing		Active member list reconciliation		‘What to expect’ valuation meetings		Provisional valuation results issued		Employer valuation consultation		Final valuation contributions confirmed		Valuation results certified			
Member (active)	Pre-retirement workshop pilot	Pension scam awareness campaign		Depot roadshow	Academy roadshow	BASBM summer conference	College and university roadshow	Annual benefit statements	District roadshow	District roadshow	Pension tax events	Pensions portal promotion	Pre-retirement workshop	Pension scam awareness campaign	
						College and university roadshow	Pre-retirement workshop		Active newsletter		BASBM winter conference				
Member survey, Pensions Portal promotion, Member Services pension support, one-to-ones, presentations, webinars and videos															
Member (deferred)		Pension scam awareness campaign				Annual benefit statements	Deferred newsletter Pensions portal promotion		District roadshow	District roadshow	Pensions portal promotion			Pension scam awareness campaign	
									Pensions portal prize draw						
Member survey, Pensions portal promotion, Member Services pension support, one-to-ones and presentations															
Member (pensioner)		Post-retirement survey	Quarterly and annually paid pensioner newsletter and P60s issued	Pensioner newsletter Pensions portal promotion	Tea and teach	Quarterly paylips issued			District roadshow	District roadshow	Pensions portal promotion				Quarterly and annually paid pensioner newsletter and P60s issued
									Pensions portal prize draw	Quarterly paylips issued					
Trustees/ Pensions Board	Media roundup	Media roundup	Media roundup	Media roundup	Media roundup	Media roundup	Employer Mid-Year Review	Media roundup	Media roundup	Media roundup	Media roundup	Media roundup	Media roundup	Media roundup	Media roundup
	Pensions Board meeting		Pensions Committee	Pensions Board		Pensions Committee	Pensions Board		Pensions Committee (including Fund-level provisional results valuation)	Pensions Board	Employer Annual General Meeting	Pensions Committee (valuation update)	Pensions Board meeting		Pensions Committee