Brightening up your admin

Clive Pothecary

Daniel Taylor

⌄ **In July last year, the EDF Group (EDFG) of the Electricity Supply Pension Scheme transferred pensions administration services to Trafalgar House. *Pensions Age* sat down with EDF pensions liaison manager, Clive Pothecary, and Trafalgar House client director, Daniel Taylor, to find out what made the transition a success**

What were the main challenges facing the EDFG pension scheme before the transition?
Clive Pothecary: The EDFG pension scheme is vast, covering over 30,000 members across both DB and DC arrangements. The scale alone was a challenge, but the real issue was the complexity of managing data accuracy and operational efficiency while still meeting high member expectations. We were determined to ensure that members received the best possible service, but the systems and processes we had in place weren't fully up to the task. This created bottlenecks and inefficiencies that needed addressing urgently.

Daniel Taylor: For a scheme of this size and complexity, understanding its nuances was crucial. The variety of member needs and technical requirements demanded a bespoke approach.

Addressing these challenges required significant investment in automation, data cleansing, and process optimisation but, most importantly, a shared commitment to improving the member experience. It wasn't just about finding fixes; it was about creating a scalable and sustainable solution.

What motivated the EDF trustees and pensions management team to make a change?
Pothecary: Improving the member experience was at the heart of our collective decision. We wanted members to feel empowered and supported, which meant modernising our administration offering. Data accuracy, efficient communication, and self-service tools were priorities, but equally important was finding a partner who understood our culture and vision. Trafalgar House's emphasis on collaboration and adaptability resonated with us.

Taylor: EDF and the trustees were clear about their shared goals from the outset – enhancing member outcomes while aligning with its broader corporate objectives. That clarity helped us design a solution that not only addressed current challenges but also laid the groundwork for future improvements. For Trafalgar House, it was about aligning our strengths with EDF's vision.

Why was Trafalgar House chosen as the new administration partner?
Pothecary: The decision came down to their comprehensive approach. Trafalgar House didn't just tick the boxes on technical capability; they demonstrated a genuine understanding of our challenges and close alignment to our cultural values. Their focus on transparency, robust governance, and clear communication stood out during the selection process. They also had a track record of delivering results on projects of similar scale and complexity.

Taylor: We positioned ourselves not just as a service provider but as a partner invested in the success of EDF and the scheme trustees. Our flexible, member-centric approach and commitment to governance and collaboration differentiated us. We wanted EDF to see us as an extension of their team, fully aligned with their goals and values.

What were the key priorities and objectives for the installation programme?
Pothecary: From the outset, we prioritised creating a seamless digital experience for our members. Automation, enhanced self-service tools, and streamlined communication were critical. We also needed to ensure that the project aligned with EDF's long-term strategy, particularly around improving operational efficiency and member engagement.

Taylor: Governance and collaboration were at the core of our strategy. We knew the programme's success would depend on regular communication, clear prioritisation, and a shared focus on outcomes. Our goal was to deliver not just a technical transition but a transformational experience for members and stakeholders alike.

How did the partnership between EDF and Trafalgar House work in practice?
Pothecary: Collaboration was essential.

Weekly updates kept us on track with day-to-day progress, while monthly steering meetings ensured we stayed aligned on the bigger picture. Trafalgar House's openness and willingness to address challenges head-on were crucial. For example, their approach to involving subject-matter experts in key decisions made a significant difference in navigating complex aspects of the programme.

Taylor: Strong governance was our guiding principle. Both teams embraced a culture of transparency, ensuring challenges were surfaced and addressed quickly. By fostering an environment of trust and mutual respect, we maintained momentum and ensured the programme stayed on course, even when unexpected hurdles arose.

What role did cultural alignment play in the success of the project?
Pothecary: Cultural alignment was a cornerstone of this project's success. Trafalgar House invested time in understanding EDF's culture through site visits to our locations. These visits weren't just symbolic, they allowed their team to engage with our workforce including local HR teams, understand their needs, and see firsthand the values that drive our organisation. It built a foundation of trust and empathy that carried through the entire programme.

Taylor: For us, the site visits were a game-changer. Meeting scheme members in their workplaces gave us invaluable insights into their day-to-day experiences and expectations. This understanding allowed us to tailor our approach to reflect EDF's culture and values. Beyond the visits, we also worked closely with EDF on equality, diversity, and inclusion initiatives, embedding these principles into every aspect of the administration process.

How did social engagement strengthen the partnership?
Pothecary: Building personal connections made a real difference. From informal gatherings to team-building events, these social interactions helped foster trust and camaraderie. By creating an open, supportive environment, we could tackle challenges together more effectively. It's something I would recommend to any organisation embarking on a similar project: don't underestimate the power of human connection.

Taylor: Social engagement went hand-in-hand with professional collaboration. Spending time together outside of formal meetings allowed us to build genuine relationships. This trust translated into smoother communication and a stronger sense of shared purpose during the programme.

What were the key achievements of the programme?
Pothecary: The new member self-service portal was a highlight. It gave members greater control over their pensions and provided a vastly improved digital experience. The programme also significantly increased automation, reducing manual processing and enhancing efficiency. Finally, comprehensive data cleansing ensured that our records were accurate and up-to-date, setting us up for long-term success.

Taylor: Beyond the immediate results, the programme established a platform for ongoing innovation. The governance structures and collaborative practices we put in place have become a blueprint for future projects. The focus on member engagement and operational excellence will continue to deliver value for EDF, the trustee and the members.

What lessons would you share with other pension schemes considering a similar transition?
Pothecary: The biggest lesson is the importance of collaboration. A strong partnership with your administrator can transform your outcomes. Governance is also critical – having a clear structure for decision-making and regular communication ensures that everyone stays aligned. In addition, ensure that there is sufficient time given to the transition process – it is key to allow for the transition to be performed carefully and controlled rather than trying to rush it.

Taylor: Flexibility is another key takeaway. Challenges will arise but approaching them with a pragmatic mindset can turn potential roadblocks into opportunities for growth. And don't underestimate the value of cultural alignment – it can be the difference between a successful project and a missed opportunity.

How does this partnership position the EDFG scheme for future growth and innovation?
Pothecary: We've built a strong foundation for continued evolution. With Trafalgar House as a trusted partner, we're confident in our ability to adapt to future challenges and opportunities. This project has positioned us to deliver even greater value to our members in the years ahead.

Taylor: This partnership is a testament to what's possible when two organisations share a vision and work together to achieve it. EDFG is now well-placed to embrace further digital transformation and innovation, ensuring it continues to meet the needs of its members and stakeholders.

How would you describe the journey and outcomes in one word or phrase?
Pothecary: Transformational. This project has truly redefined how we serve our members and manage our scheme.

Taylor: Collaborative. The strength of our partnership was the foundation for every success we achieved.

Written by Francesca Fabrizi