











# Appendix A

Appendix A

KPI's for the period 01.07.23 to 30.09.23							
WORKTYPE	TOTAL CASES	TARGET DAYS FOR EACH CASE	TARGET MET CASES	MINIMUM TARGET PERCENT	TARGET MET PERCENT	AVERAGE TIME TAKEN	DIRECTION OF TRAVEL
Age 55 Increase to Pension	1	20	1	85	100	10	←
AVC In-house (General)	36	20	35	85	97.22	3.11	↓
Change of Address	152	20	150	85	98.68	2.41	↓
Change of Bank Details	94	20	94	85	100	2.19	←
Death Grant to Set Up	46	10	38	85	82.61	26.41	↓
Death In Retirement	126	10	116	85	92.06	2.09	↑
Death In Service	6	10	6	85	100	4.5	←
Death on Deferred	5	10	5	85	100	2.08	↑
Deferred Benefits Into Payment Actual	323	10	305	90	94.43	5.29	↑
Deferred Benefits Into Payment Quote	377	35	342	85	90.72	30.81	↑
Deferred Benefits Set Up on Leaving	514	20	355	85	69.07	86.21	↓
Dependant Pension To Set Up	83	5	77	90	92.77	4.02	↑
Divorce Quote	55	40	48	85	87.27	22.32	↓

Divorce Settlement Pension Sharing order Implemented	3	80	3	100	100	5	
DWP request for Information	1	20	1	85	100	2	
Estimates for Deferred Benefits into Payment	3	10	3	90	100	8.33	↑
General Payroll Changes	114	20	113	85	99.12	2.04	↓
Initial letter Death in Retirement	126	10	119	85	94.44	1.35	↓
Initial Letter Death in Service	6	10	6	85	100	2	←
Initial letter Death on Deferred	6	10	6	85	100	1.17	←
Interfund Linking In Actual	107	35	37	85	34.58	148.03	↓
Interfund Linking In Quote	68	35	63	85	92.65	24.87	↓
Interfund Out Actual	39	35	29	85	74.36	31.52	↓
Interfund Out Quote	32	35	29	85	90.63	27.27	↑
Life Certificate	14	10	13	85	92.86	4.5	↑
Monthly Posting	817	10	788	95	96.45	3.4	↑
NI adjustment to Pension at State Pension Age	16	20	16	85	100	8.63	←

Pension Estimate	11	10	10	90	90.91	8.62	
Phone Call Received	840	3	807	95	96.07	1.79	
Refund Actual	161	10	161	90	100	2.31	
Refund Quote	278	35	278	85	100	4.24	
Retirement Actual	208	10	195	90	93.75	5.01	
Transfer In Actual	45	35	12	85	26.67	75.37	
Transfer In Quote	48	35	45	85	93.75	24.23	
Transfer Out Payment	6	35	6	85	100	20.83	
Transfer Out Quote	164	35	142	85	86.59	23.34	
Update Member Details	857	20	853	100	99.53	4.15	

This page is intentionally left blank