

Appendix A

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KPI's for the period 01.01.23 to 31.03.23						
WORKTYPE	TOTAL CASES	TARGET DAYS FOR EACH CASE	TARGET MET CASES	MINIMUM TARGET PERCENT	TARGET MET PERCENT	AVERAGE TIME TAKEN
Age 55 Increase to Pension	2	20	2	85	100	1
AVC In-house (General)	31	20	31	85	100	1.87
Change of Address	188	20	188	85	100	1.84
Change of Bank Details	69	20	69	85	100	2.23
Death Grant to Set Up	33	10	31	85	93.94	8.37
Death In Retirement	183	10	156	85	85.25	8.72
Death In Service	9	10	6	85	66.67	23.11
Death on Deferred	8	10	7	85	87.5	9.75
Deferred Benefits Into Payment Actual	245	10	242	90	98.78	4.01
Deferred Benefits Into Payment Quote	200	35	109	85	54.5	50.76
Deferred Benefits Set Up on Leaving	573	20	408	85	71.2	49.8
Dependant Pension To Set Up	85	5	81	90	95.29	4.2
Divorce Quote	37	40	37	85	100	9.19
Divorce Settlement Pension Sharing order Implemented	3	80	3	100	100	14.33
DWP request for Information	1	20	1	85	100	2
Estimates for Deferred Benefits into Payment	11	10	10	90	90.91	7.64
General Payroll Changes	113	20	113	85	100	2.34
Initial letter Death in Retirement	193	10	192	85	99.48	1
Initial Letter Death in Service	9	10	9	85	100	1.33
Initial letter Death on Deferred	8	10	7	85	87.5	10.25
Interfund Linking In Actual	52	35	28	85	53.85	120.78

Interfund Linking In Quote	117	35	106	85	90.6	28.25
Interfund Out Actual	150	35	143	85	95.33	10.67
Interfund Out Quote	149	35	142	85	95.3	10.34
Life Certificate	42	10	42	85	100	2.14
Monthly Posting	775	10	716	95	92.39	4.39
NI adjustment to Pension at State Pension Age	10	20	10	85	100	12.8
Pension Estimate	122	10	114	90	93.44	6.39
Phone Call Received	743	3	708	95	95.29	1.49
Refund Actual	241	10	239	90	99.17	3.05
Refund Quote	314	35	201	85	64.01	54.11
Retirement Actual	128	10	123	90	96.09	3.78
Transfer In Actual	72	35	65	85	90.28	19.22
Transfer In Quote	119	35	119	85	100	6.58
Transfer Out Payment	14	35	14	85	100	7.93
Transfer Out Quote	139	35	118	85	85	20.67
Update Member Details	758	20	630	100	83.88	13.05