



















Appendix A

Appendix A

KPI's for the period 01.04.23 to 30.06.23							
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	2	20	2	85	100	9.5	←
AVC In-house (General)	50	20	50	85	100	1.92	←
Change of Address	189	20	189	85	100	1.77	←
Change of Bank Details	74	20	74	85	100	3.26	←
Death Grant to Set Up	26	10	24	85	92.31	21.15	↓
Death In Retirement	176	10	155	85	88.07	7.53	↑
Death In Service	3	10	3	85	100	7	↑
Death on Deferred	11	10	8	85	72.73	22.27	↓
Deferred Benefits Into Payment Actual	257	10	247	90	96.11	4.35	↓
Deferred Benefits Into Payment Quote	374	35	223	85	59.63	37.51	↑
Deferred Benefits Set Up on Leaving	523	20	347	85	66.35	64.63	↓
Dependant Pension To Set Up	70	5	61	90	87.14	4.64	↓
Divorce Quote	18	40	18	85	100	13.83	←
Estimates for Deferred Benefits into Payment	4	10	2	90	50	12.75	↓
General Payroll Changes	148	20	147	85	99.32	1.91	↓
Initial letter Death in Retirement	176	10	167	85	94.89	2.43	↓

Initial Letter Death in Service	3	10	3	85	100	1	
Initial letter Death on Deferred	11	10	11	85	100	1.09	
Interfund Linking In Actual	38	35	17	85	44.74	92.89	
Interfund Linking In Quote	86	35	77	85	89.54	26.99	
Interfund Out Actual	41	35	39	85	95.12	13.46	
Interfund Out Quote	41	35	39	85	95.12	11.44	
Life Certificate	103	10	89	85	86.41	4.76	
Monthly Posting	893	10	836	95	93.62	5.38	
NI adjustment to Pension at State Pension Age	8	20	8	85	100	17.63	
Pension Estimate	89	10	80	90	89.89	8.06	
Pension Saving Statement	1	20	1	100	100	1	
Phone Call Received	868	3	841	95	96.89	1.32	
Refund Actual	173	10	173	90	100	2.51	
Refund Quote	303	35	286	85	94.39	10.7	
Retirement Actual	153	10	144	90	94.12	4.42	
Transfer In Actual	17	35	16	85	94.12	33.82	
Transfer In Quote	33	35	32	85	96.97	12.03	
Transfer Out Payment	23	35	23	85	100	12.57	
Transfer Out Quote	52	35	49	85	94.23	15.35	
Update Member Details	1268	20	1208	100	95.27	5.99	