



Overview of our Client and Customer Services

External recognition from CCA Global

The Customer Contact Association (CCA Global) has announced its CCA Excellence Awards shortlist for 2024 and we've been shortlisted across six categories.

With CCA Global being a leading authority on customer service strategies and operations, the CCA Excellence Awards are regarded as the ultimate recognition of customer service excellence, acknowledging outstanding talent, initiative, innovation and best practice.

Taking care of customers is our number one priority and we're proud to be known for the world-class service we deliver.

Thanks to the great work demonstrated by our customer services teams, L&G has been shortlisted in six categories:

- Rising star
- Manager of the year
- Team of the year – Back office
- Team of the year
- Environmental, Social and Governance impact
- Effective attraction & recruitment programme

We've achieved great success at the CCA Awards in previous years and it's great to see our teams being recognised in the shortlist once again. The winners are due to be announced in April 2024.



CCA Global Standard Accreditation

We're pleased to be CCA-accredited for the sixth consecutive year, demonstrating our commitment to customer service excellence.

“Your achievements in 2023, underscore Legal & General’s commitment to providing customers with an outstanding service experience.

Your commitments around Consumer Duty, demonstrate your responsiveness to industry changes and regulatory requirements... The technology transformations showcase your adaptability and commitment to leveraging innovation for customer efficiency... The positive feedback from both customers and colleagues is a testament to the exceptional service culture you have fostered.”

Anne Marie Forsyth, CCA Executive

In 2023, our Client and Customer Services teams achieved an outstanding set of metrics including:

Maintaining our world class Net Promoter Score (NPS) of **+70**

Resolving **96%** of queries within **ve working days**

Issuing **92%** of quotes within **ve working days**

95% of payments were settled within **ve working days**

Our average call answering time was **under 30 seconds**

Meeting our customers

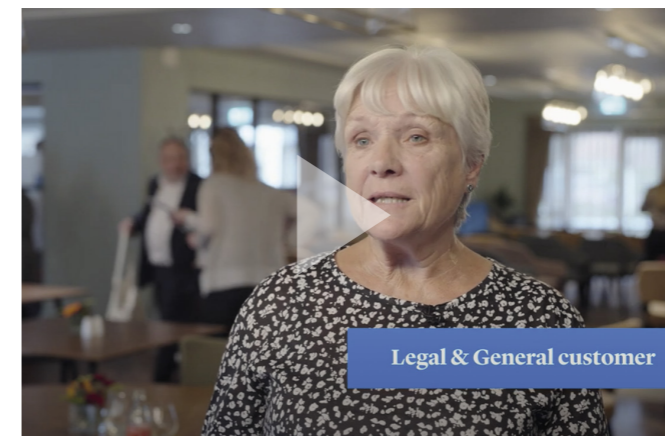
We recently invited some of our customers to join us at two events hosted at Inspired Villages' locations.

These events provided a unique opportunity for our customers to meet with a number of different experts across our company, establish personal connections, and receive helpful support and advice. In turn, we gained valuable insights into what matters most to our customers, so we can continue to provide world-class customer service.

The day was summarised by one of our pension policyholders, who provided the following feedback:

“Today wasn’t what I expected at all – it was brilliant! Everyone was so lovely and helpful throughout the day.”

We look forward to teaming up with Inspired Villages and running more customer roadshows this year.



Our flagship customer event



We're excited to return to BBC Gardeners' World Live on **13 – 16 June** and welcome customers to our dedicated Retirement Lounge. Our clients and customers can save 20% on tickets with our early bird offer until 16 May using the code: **LANDG1**

Please visit: bbcgardenersworldlive.com/landg to find out more.

Enhancing our technology

At the end of 2023, we migrated our customer administration platform to the Azure Cloud. The migration will enable our Client and Customer Services teams to onboard PRT schemes easily and quickly, while maintaining a high level of security and efficiency.

The Azure Cloud will safeguard our administration platform to ensure it remains secure, resilient and future-proofed, helping us meet our ambitions and support our teams, while providing the best level of service to customers.

“This investment forms part of a multi-million-pound transformation project, providing our in-house teams the very best tools to look after our customers. The modernisation of our architecture further strengthens our operational resilience, which is incredibly important when looking after the financial security and pension payments of over 600,000 customers and supporting the growth of our market.”

Dave Poulton
Chief Customer Officer



Supporting a busy market

Our in-house administration function has grown from strength to strength over the past 35 years and the average tenure within the teams is more than five years, including quite a few colleagues who have been with the business for more than 20 years.

Our turnover rate is very low at less than 2.5% (as at December 2022) and we have an annual and five-year resource planning process in place to help us maintain and develop our recruitment, talent management and talent development programmes.

We have been growing consistently over the past few years and we have a workforce strategy in place to help us scale our administration.

Historically, we've typically increased the size of our Client and Customer Service teams by 5-10% per year to support the growing PRT business. In line with our new business forecast for 2024 (and beyond), we expect this level of recruitment to increase.

Our focus also covers process efficiencies to help build a sustainable and resilient operating model. We are

investing continuously in our technology to meet our growing business demands.

We believe this focus on people and processes will enable us to manage the increasing demand from market volumes expected in the coming years.

In addition to the recruitment described above we're also investing heavily in our PRT Client & Customer Services apprenticeship programme, which was launched last year. In 2023 we brought in a further six apprentices and we expect this to be the minimum annual intake moving forward.



Meet our apprentices

Through our apprenticeship programme, we're supporting people looking to build a career within the pensions industry. The programme aims to diversify our recruitment methods, finding and developing talented individuals to address our business needs, helping us support a growing market.



Max Eagle, Apprentice, Collateral and Reinsurance Services team (CRIS team)

"I found this apprenticeship through a friend, who told me L&G were hiring. The apprenticeship journey has been great so far! I was eased gently into my role and I balance it with my online coursework, where I complete tasks every week and attend fortnightly lectures.

The CRIS team is responsible for maintaining our relationships with Reinsurers. My key responsibilities include working out the monthly payments for Reinsurers of different schemes. I'm also responsible for contacting the Reinsurers and issuing these payments.

I've learnt a lot of new skills as an apprentice, the main one being how to work within an office environment, which consists of building relationships with colleagues, meeting deadlines, and communicating well with external companies whilst representing L&G.

My favourite thing about the apprenticeship so far is the people in my team and their trust in me to own tasks, which is highly rewarding. I would definitely recommend this apprenticeship to others as L&G offers a great working environment, while providing challenging yet achievable work to help you grow in your career.

My long-term goals would be to pass this apprenticeship course, stay at L&G and further develop, while continuing to build relationships with different people across the business.

Outside of work, a hobby of mine is football. I play for my local team on weekends and try to go watch as many Arsenal games as I can. I'm also really interested in music and love going to concerts and festivals - I've got tickets to Leeds festival this year!"



Keira Elwell, Apprentice

"My apprenticeship programme at L&G has been both informative and fun. I have participated in volunteer days and team day activities, as well as becoming a real asset to my team.

Some skills I have learned from my apprenticeship are using Excel, setting up meetings, collaborating on activities and much more.

My favourite thing about my apprenticeship is the apprentice networking days out, organised by the Future Talent team in HR.

The most challenging part of my apprenticeship is trying to pick up new tasks and learning new processes for the first time. However, it does get easier the more you do it.

I would recommend my apprenticeship to those not wanting to go to uni and instead seeking to get their foot in the door at a big firm, as it is similar to the situation I was in and don't regret my decision at all.

In five years, I would like to be at L&G, but a few grades higher and with more knowledge. I'm still unsure where I want my career to go but L&G offer so many opportunities, so I am sure I'll find something that suits me."

I used to be an all-star cheerleader and Level 3 gymnast - I competed nationally. I also have a black belt in karate and enjoy spending time with friends."



Cara Epega, Apprentice

"I applied to the 13-month apprenticeship through a website called 'YoungProfessionals', as part of studying for a Level 3 Business Associate qualification. This qualification involves both the experiences learned at L&G and theory in our lectures, focusing on the stakeholder and risk management, the supply chain, training, coaching and more.

It has now been five months since I joined L&G's transitions team, which is responsible for creating Ben Specs that outline how schemes should be administered. My team also project manages schemes, which includes having monthly calls with clients to answer any queries they have. As well as completing SLA summaries, I am working on my first project, where I take on the responsibility of creating welcome letters and initiation slides to send to clients.

Since the apprenticeship, I have learned new skills regarding my DB knowledge, which is sometimes complex and requires a willingness to learn to understand - I am constantly improving this skill as there is always much to learn!

My favourite thing about the apprenticeship is that it has helped me grow personally in terms of being more independent and confident in my work. The people I work and interact with also make my apprenticeship experience highly enjoyable.

I would recommend this apprenticeship as I feel that it helps you take initiative and have more trust in yourself. It has provided me with more than adequate experience in both the world of work and my individual life.

In the future, I would like to be in a profession that benefits the wider society, as I believe there are areas in need of further development to build a better quality of life for local people.

Outside of my apprenticeship I am a keen baker, mainly experimenting with different recipes. It is one of the things I love to do and it's quite soothing for me. If eating food from different cultures is a hobby then count me in! I'm a foodie who is always willing to explore and try new things."

Giving back to the community

Dan Papworth, a Senior Pensions Administrator in our team, has been giving back to the local community in Hove by organising beach cleans during the summer months in 2022 and 2023. Last year's beach clean involved the largest number of volunteers yet, from multiple teams across L&G.

With many colleagues, friends and family members using the local beaches, we see this as an important initiative to help make the area safer and more attractive for everyone to enjoy, as well as helping to safeguard local biodiversity.

This is a great opportunity to give something back to the local community and a chance for colleagues to connect with each other away from their desks.



Contact us

For further information, please contact:



derisking@landg.com



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