




PLAN FOR A SMOOTH JOURNEY

Our auto enrolment design service will help you make the most of the opportunities auto enrolment creates. It allows you to provide a range of services to current and prospective clients, efficiently and profitably. In the early stages, you're in the driving seat. Create comprehensive reports to set out the problem the employer faces and how you can help. Further down the line, our National Support Unit will help you find the right design for your client's auto enrolment scheme. It's all part of our 5 star service and it comes at no extra charge.

THE DESIGN JOURNEY KEY

-  You drive the journey
-  Our National Support Unit takes over
-  Report available

DESIGN STAGE

Gather employer data



Use our fact find to gather the information you need, when you need it.

Benefit to you

You'll know what information you need to generate each report, you don't need everything to get started.

1. Initial assessment report



You only need three pieces of information to create a comprehensive report.



Educate your client about their duties, explain what will happen if they don't comply and how you can help.

Benefit to you

Use the report to prospect for and secure new business, and help your existing clients plan ahead.

Benefit to your client

They'll understand what auto enrolment means for them, what they need to do and how long they have to prepare.

2. Scheme assessment report



Show your client how their existing scheme compares to the new requirements and highlight the changes they need to make.



Benefit to you

You can build a clear picture of the work your client is facing and highlight areas where they'll benefit from your expertise.

Benefit to your client

Your client will understand where their scheme falls short and what changes need to be made.

4. Customised model report



To find the right scheme design for your client, you can try out one of our default models or customise your own. You can apply salary exchange, contribution phasing and project worker take-up rates.



You can show how much auto enrolment will cost your client, down to individual worker level.

Benefit to you

You can showcase your knowledge, skills and services by designing the right auto enrolment solution for your client.

Benefit to your client

They can be confident your recommendations have been tailored to suit their needs - and they can make an informed decision about the future design of their auto enrolment scheme.

3. Workforce assessment report



Set out the duties your client will have and give them an idea of the costs involved.

Benefit to you

You can promote the value of your services and how you can help manage the costs of auto enrolment.

Benefit to your client

Your client will know the exact duties they have for each worker and understand the impact auto enrolment will have in terms of their ongoing costs and administration.

ROYAL LONDON NATIONAL SUPPORT UNIT TAKES OVER

Create reports your clients will value

All four reports are written from you to the employer, helping you demonstrate the work you've carried out and the expertise you're providing. They can even be personalised by adding your company logo and contact details.

The image displays four report covers for 'EMPLOYER DUTIES' arranged in a 2x2 grid. Each cover features the pcd logo at the top and a specific report title at the bottom. To the right of the top two covers are icons for a Word document and a PDF file. A callout box with a dotted line pointing to the pcd logo on the bottom-right cover contains text about report delivery formats.

Report Title	Format
Initial assessment report for Newco	Word / PDF
Scheme assessment report for Newco	Word / PDF
Workforce assessment report for Newco	Word / PDF
Scheme modeller report for Newco	Word / PDF

Reports are delivered in two formats, giving you a degree of flexibility to make changes if needed.

Benefits of our design service

We've developed our design service with your specific needs in mind. It's simple, easy to use and follows a logical process, allowing you to make informed recommendations and provide a valuable service you can charge for.

You can use our service to:

- Prospect for and secure new clients.
- Educate your existing clients about auto enrolment.
- Generate professional client reports.
- Make confident recommendations your clients will trust.

How Royal London can help

Our auto enrolment design service will give you all the tools you need to find the right auto enrolment solution for your client, efficiently and profitably. To find out more, speak to your usual Royal London contact or visit the auto enrolment area of our website at adviser.royallondon.com/autoenrolment.

Royal London

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