

Compendia

Compendia SME

Helping meet the needs of small and medium schemes

UK pension schemes typically want to achieve the same things, whatever their size, budget or resources available:

- the highest levels of service to Members and Trustees
- driving down the costs of long-term administration
- transparency and compliance

Modern pensions software should offer the technical solutions to achieve these aims through key features such as web enablement, on-line member services, workflow, electronic document management (EDM) and 'what if' calculations. In addition they can help reduce the ongoing cost of maintenance as they have the flexibility to incorporate scheme and legislative changes with ease.

With this in mind, Xafinity Claybrook has developed a defined package of functionality based on our web based solution – Compendia. This package is targeted specifically at meeting the requirements of small and medium schemes. It is combined with a clear implementation approach focussed on delivering the maximum functionality in a timely and risk adverse fashion.

As a supplier with 30 years experience we can offer unrivalled expertise and peace of mind. We have been recognised for three years running as Best Software Provider at the Pensions Awards.

Just some of the benefits of Compendia SME

1. Our market leading, proven package puts you in control
2. With its integrated Workflow, EDM and modelling Compendia has been designed to cover the full spectrum of administration tasks. Additional modules such as pensioner payroll are also available
3. We aim to deliver the maximum amount of functionality in the shortest time with minimal disruption to your normal working practices
4. Extensive automation speeds up administration, reduces the opportunity for error and ensures scheme and legislative changes are met
5. Implementation is performed on a fixed price basis, giving you peace of mind

What is included in the package?

Data Migration Assessed at start of project ✓ Data integrity reporting ✓ Full control total reporting in excel ✓ Two way mapping specification ✓ Regression testing ✓ Standard data mapping ✓	Calculations Legislatively compliant ✓ Quotes from active and deferred ✓ Leavers including death ✓ Active benefit statements ✓ Individual and bulk calculations ✓ Valuation ✓	Reporting Quick and easy with adhoc reporter ✓ Advanced report writer ✓ Case Statistics ✓ Member movements ✓ Full Audit reports ✓ Comprehensive training ✓
EDM Fully integrated ✓ Store at Member or scheme level ✓ Case Statistics ✓ Documents in and out ✓ Letters, calculation results and statements stored automatically ✓ Full training ✓	Workflow processes Streamline processing ✓ Ensures legislative checks happen ✓ Work Authorisation ✓ Standard suite of workflows ✓ Integrated letters and statements ✓ Configurable SLAs ✓	Additional features Import and export tool ✓ Annual renewal interface ✓ Member access web pages ✓ Thin client platform for full integration with portals, intranet and internet ✓ Microsoft Word integration ✓

A unique approach to implementation

1. Pre project phase with up front questionnaires to ensure the scope is fully understood and the cost is adequately estimated
2. Clearly defined implementation path based on past experience with small and medium schemes, including:
 - Workshops and consultancy undertaken early on to capture information effectively for implementation and planning
 - Delivery of technical architecture, data migration and calculation specifications
 - Data integrity review to identify data cleansing requirements
 - Resource requirements clearly defined
 - Installation of a test system for user acceptance testing as well as the live system
 - Go-live and planning meetings
 - Floor walking post go-live to ensure system is delivering maximum productivity
3. Phased delivery which matches business challenges to ensure maximum amount of functionality is delivered in the shortest space of time. A 'live' system will be available once phase 1 is complete (typically within 3 to 4 months)
4. System training as part of the package including consultancy for letter building
5. Opportunity and capacity to purchase 'add on' services where required



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