


Outcomes and key actions


Plan 20|30 is grounded in **three forward-looking aspirations:**



Operational excellence
optimize quality, cost and service



Service innovation
bring new services to life



Influence
be thought leaders and support the plans to increase the number of members


The three aspirations are supported by **five strategic objectives:**

 **Objective 1:** Strengthen efficiency and quality in everything we do

- 1.1 Increased reliability and efficiency of core pension and key support functions
- 1.2 Proactive risk mitigation against cyber and emergent threats
- 1.3 Transparency into key organizational performance measures

 **Objective 2:** Focus on people and culture

- 2.1 Accountable and empowered employees, with performance measured and mapped to specific business goals
- 2.2 Forward-thinking culture
- 2.3 Talent attracted, retained and developed to support our future needs

 **Objective 3:** Elevate the member and employer experience

- 3.1 Increased agility and ability to meet rapidly evolving expectations
- 3.2 Trusted and highly regarded by members and employers
- 3.3 Improved members' retirement readiness

 **Objective 4:** Proactively support the evolving needs of the plans

- 4.1 Proactively identify and address plan needs
- 4.2 Deliver quality insights and be a recognized thought leader on workplace pensions and retirement

 **Objective 5:** Partner with plans to increase their membership

We will expand our role as a strategic partner to the plans' boards of trustees to increase plan membership. Increased plan membership strengthens plan sustainability.

This goal is not a focus during 2021-2024; however, we will consider opportunities as they arise and support plan boards in agreed-to areas. A more deliberate focus will be placed on this goal post-2024.

Objective 1 key actions

- 1.1 [
 - Broaden operational excellence program
 - Automate manual calculations
 - Digitize workflow
 - Enhance employer digital services
 - Pilot robotic process automation
 - Build agility and scalability into our core applications
- 1.2 [
 - Enhance information security
 - Migrate corporate information to the cloud
- 1.3 [
 - Modernize our financial management system
 - Deepen operational analytics

Objective 2 key actions

- 2.1 [
 - Manage talent with a modern integrated approach
 - Enhance workforce planning
- 2.2 [
 - Deliver an employee collaboration hub
 - Provide a digital employee service experience
- 2.3 [
 - Create a flexible workforce

Objective 3 key actions

- 3.1 [
 - Expand digital services
- 3.2 [
 - Enhance service management
 - Enhance employer digital services
- 3.3 [
 - Provide value-added service to members

Objective 4 key actions

- 4.1 [
 - Support plan design changes and post-retirement group benefit changes
 - Maintain legislative and plan rule compliance
- 4.2 [
 - Implement service enhancements

