Public Pension Members: A Great Asset for System Updates

INTRODUCTION

As public pension systems look to transform their operating systems, tenured members have a significant role to play in these potentially long-term and complex projects. Rather than wait until the upgraded system is available for use, members can serve as important resources, especially tenured members who have engaged with previous legacy systems and have first-hand knowledge of the customer-facing systems. By advising on such topics as documentation, plan communications, and self-service portal design, these members can provide significant value-add for solution providers to develop a new or upgraded existing pension system that features collaborative, intuitive, and engaging human-centered technology to fulfill pension systems' commitment to public servants nationwide.

WHAT MEMBERS CAN OFFER

Long-term pension plan members can often be involved in a system for 15+ years, giving them extensive exposure to legacy systems and their many self-service, communication, and CRM limitations. These tenured members understand that pension systems should enable intuitive and engaging self-service and convenience for pension members throughout their active careers and into retirement. For the pension systems themselves, embracing these capabilities is not only a requirement for today's post-pandemic, accelerated digital world, but also necessary to address rising member expectations for pension systems to offer the same speed, security, and usability as any smartphone application.[1]

SPECIFIC VALUE-ADDS

From their experiences, long-term members are well equipped to advise solution providers about more meaningful online help documentation, usability, and GUI design. Specifically, input on the language and layout of correspondence templates, the wording of system messages, the arrangement of menu items on a GUI, and/or the structure of a member self-service portal. Their early involvement could also help ensure clear expectations and establish more detailed roadmaps which would otherwise be left for later in a transformation project lifecycle. By incorporating member insight, solution providers could also establish more valuable and appropriate strategies for communicating change and other pertinent information throughout the project. The pension plan systems themselves could also consult members on RFP specifications, like defining the approach for online help assistance, communications, and education. Members could advise on how they typically search for, access, and process information, as well as offer recommendations on usability, and organization of the help system overall. In engaging members in the transformation process, systems can also promote an environment of openness and transparency.

CONCLUSION

As the number of retired U.S. civil servants continues to grow, advanced public pension systems with human-centered technology are needed more than ever. System members, especially experienced, tenured system members, can provide valuable advice to systems and solution providers to deliver the best member outcomes, namely systems that foster collaboration between people and technology. This can best occur when members are involved early on and throughout the project's duration, to create a system that optimizes member usability as well as retirement resources.

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1   "How Government Agencies Can Accelerate Their Modernization Journey," Atlassian, April 2021