

Thinking outside the box



When a colleague left our team at short notice, they did so with little handover across several schemes, active projects and client relationships. On paper, the 'rules' solution would have been to rely on files, emails and internal notes and pick things up gradually as issues arose.

Instead, I felt the only sensible approach was to pick up the phone and ask the largest new client to meet in person.

I went into that meeting with no pretence that everything was under control. I was open about the situation, asked direct questions about what mattered most to them, and made it clear that I wanted to build a relationship based on honesty, not assumptions. I explained that things do go wrong in complex administration environments but that my commitment was to flag issues early and work through solutions collaboratively.

That conversation completely reset the relationship. Rather than focusing on what had been lost with

➤ **Sometimes not abiding by standard protocol and instead thinking outside the box can make all the difference when it comes to assisting clients. *Pensions Age* finds out how**

the previous handover, we created a shared understanding of priorities, risks and expectations. It also opened a two-way dialogue where the client felt comfortable being candid with us.

Since then, this has become one of my strongest and most trusted client relationships. The client values transparency over perfection, and we work as true partners proving that sometimes stepping outside the 'process' and prioritising human connection delivers the best professional outcomes.

Isio senior client relationship manager, Adrian Marchant

I encourage my team to think creatively and challenge conventional approaches. Each member brings unique experience, perspectives and insights, and harnessing this diversity enables us to deliver better outcomes to our seven million members.

One example of thinking outside the box that stands out, involved a small own trust pension scheme that had been refused terms by four commercial insurers due to its size and perceived quality.

Our approach was deliberately different, as we:

- Offered competitive pricing for members, and
- Waived all employer set-up costs

The result was a materially better outcome for members, who benefited from reduced charges and the oversight of professional trustees operating to the highest standards. The scheme also gained access to a provider that already meets the proposed scale requirements, delivering long term stability and value.

People's Partnership distribution director, Stuart Reid