

itm

Solution delivered...

ITM: Independent Data Consultants

Data / Technology / Consultancy

**An average year
sees us:**

...

**Migrate more than
5 million records**

...

**Audit more than
4 million records**

...

**Analyse
tens of millions
of datasets**

...

May

Jun

Jul

Aug

Sep

Nov

Dec

Our story so far

Back in 2003, we saw the need for data compliance within the pension administration industry and decided to build a proposition that offered data:

+ **Analysis**

+ **Migration**

+ **Cleansing**

+ **Management**

Fast forward to today and we are the leading independent pensions data consultants.

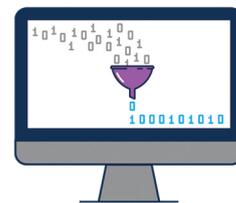
We solve complex data problems for the pensions and insurance industry using our technology and expertise.

As a result our clients:

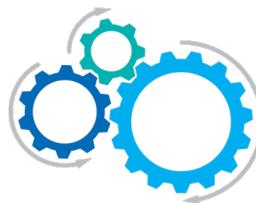
- ✓ **Save money**
- ✓ **Reduce risk**
- ✓ **Give their customers a better experience**



Data audit



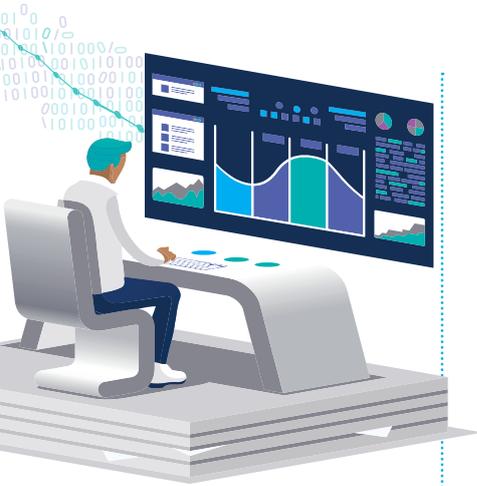
Data cleanse



Data migration



Data management



What we do

From straightforward member tracing exercises to complex GMP equalisation calculations and everything data related in between. Using our bespoke technology and highly skilled consultants, we help you draw value from your data.

We help you draw value from your data

Data

We know pensions and we know pension data. Our teams specialise in:

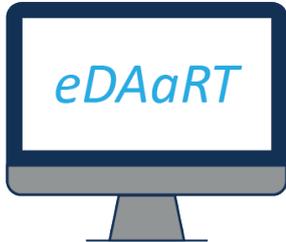
- + ***Audit – checking data presence, accuracy and adherence with Scheme rules***
- + ***Cleanse – enhancing your data, adding value by making you more efficient, reducing risk and giving members a better experience***
- + ***Reporting & insights – looking at your data and systems - to identify trends and make recommendations to improve your data and processes***
- + ***Migration – making data portable, from any source to any destination, so that transition is simpler and less risky. From decommissioning systems to digitising records, you can truly leave ‘legacy’ behind***
- + ***Tracing & mortality screening – helping you find lost members and keep addresses current***
- + ***Data archiving – providing a safe, secure and accessible place to hold legacy data***

We transform data – so rather than holding you back, it drives you forward

We audit, cleanse and trace data, to transform its quality. We help you make sure your data's fit for purpose – not just for what you need it to do today, but for what it will enable you to do in the future.

Technology

Our technology underpins the breadth of services we offer, it allows our consultants to deliver unrivalled accuracy and efficiency. Our data suite enables us to pinpoint data problems, highlight areas of strength and opportunity and design and implement data strategies through interrogation and insight. Our administration suite delivers end to end administration services and member access.



Our solutions and services are underpinned by unique technology

Data Suite

eDAaRT

– Using over 15 years of accumulated pensions data experience, our data analysis and reporting tool, eDAaRT, provides the best practice toolkit for data cleanse and migrations. By importing and making sense of huge amounts of data, eDAaRT utilises pension specific templates that seamlessly capture, process and analyse data from any source.

eArchive

– As a web based solution, eArchive enables the safe and accessible storage of legacy data that still needs to be accessed from time to time, but not on a daily basis.

Administration Suite

eConnect

- An online tool that streamlines and validates the data between schemes, platforms and auto-enrolment software for assessment, communications and payroll.

PenScope

– A comprehensive web-based system that delivers solutions for DB, DC, CARE, Master Trust and Hybrid scheme administration.

eMember

– Provides members with online access to pension and benefit information, communication materials, modellers and personalised content.

We combine our market leading technology with teams of industry experts to deliver unrivaled solutions.

Consultancy

We will get to know you, your systems, processes and data to find out:

- + *What you have*
- + *Where you hold it*
- + *How you organise it*
- + *Why you use it*

... and then we'll help you make your data effective, keeping it clean and one step ahead of what you may need it to do.

Our goal is always to deliver on time, and in budget. We keep it punctual, profitable and positive.





How we do it

We approach each project with insider expertise and outsider independence

No one knows pensions or data like we do. We've all worked in your world, so we understand your priorities and your pressures – and we have insider expertise to share with you. But we're also outsiders: we're independent. This means that we come in with not only fresh eyes, but also tried-and-tested approaches.

How we're different

We can solve intricate data problems because it's all we do.

We've been solving pension data problems since 2003. So, no matter what the data challenge, we know exactly what we're looking for. We understand the controls you need and the constraints you work to – from governance structures to regular reporting. We know the obstacles we're likely to find, and how long the job is likely to take.

We don't do any day-to-day administration – so we can focus completely on your project. This means we can commit to tight timescales, fixed costs and long-lasting solutions. It's why we can do due diligence on buyout data in just two weeks, or migrate hundreds of schemes in just eight months. And it's why, once we've solved your data problems, we can give you the technology you need to manage your own data after we've gone.

Watch this space

Traditional analysis of data is valuable; telling you what you have, if it's in the right place and what might be missing. It can help monitor performance and report against indicators. It can tell you lots of facts about what has already happened. It gives you a snapshot of backward looking data, but it can't tell you what is likely to happen next, understand why and help you take action.

That's where data science and insights comes in. When traditional analysis is coupled with data science and delivered with a human touch - an independent data consultant, you get valuable information that supports actionable insights.

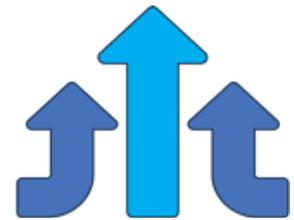
We deliver market leading technology and data solutions for the pensions and financial services sector.

From your day-to-day processes to delivering long term strategic goals, your data is at the heart of reducing risk and creating operational efficiency.

We work objectively, delivering optimum results and meeting legal requirements to improve your members' experiences.



Reduce Risk



Create efficiencies



Improve member experience



Meet legal requirements



itm

Solution delivered...

We are the market-leading independent data services and technology provider to the UK pension and insurance industry. Delivering end-to-end technology solutions and strategic guidance to trustees, pension managers and third party administrators. Our team of over 150 pension experts provide support, insight and specialist knowledge underpinned by our unique and unrivalled technology to achieve data and systems improvements.



Find out more:

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