Role Definition: Pensions Technology Expert

Pensions Technology Experts - Analyst and Consultant

PenTechX are pioneering a new role in the industry the Pensions Technology Analyst and Consultant. We will establish this as an industry standard definition for people working in Pensions Technology. These two roles are 'Pensions Technology Analyst' and 'Pensions Technology Consultant'.

A Pensions Technology Analyst is a multi-disciplined pensions and technology expert that uses a wide variety of skills, tools, and industry knowledge to solve issues and create technological solutions with a specific focus on projects. They are experienced in many traditional roles such as business, systems, data, process, test or pensions analyst. The Pensions Technology Consultant is a more experienced Analyst, this may be through experience or technical experience and skills.

Analyst/Consultant Role Definitions:

- *Business and Pensions Expert*
  - Subject Matter Expert (SME) in pensions and technology
  - Maintains synchronicity between documents and systems.
  - Influence senior stakeholders and lead others.
  - Stakeholder management - Liaise with business. Lead meetings. Ensure sign off. Senior stakeholder management.
  - Technical testing for pensions specific issues
- *Analysis*
  - Business analysis
    - In depth and deep dive into detailed pension processes
    - Uses range of standard business analysis tools.
  - Process analysis
    - Process analysis and efficiency improvement studies.
    - Document and design existing and new administration and actuarial business processes
    - Advise and offer improvement to efficiencies or quality.
    - Able to combine empirical and theoretical (documented) evidence to form conclusions, recommendations, and solutions.
  - Document analysis
    - Pension specific documentation analysis such as scheme rules, Trust Deed, Report and Account, letters, existing member cases
  - Member Data analysis
    - Use a data to prove the models, provide test cases, and potentially create a member database. (Excel, SQL, Database design)
    - Knowledge of various pension systems
  - Run and facilitate sessions.
    - One to one, Workshops, Small meetings.
    - Document outcomes and provide insight.
- *Technical Pensions Calculations*
  - Design calculation architecture
  - Document calculation specifications –write pseudo code as per guidelines using Visio, VBA. Credible to senior stakeholders.
  - Develop technical testing using Excel/VBA/Data and Pension knowledge.

- o Create/maintain data dictionary.
- o Be able to question other pension experts and respond to queries.
- *Development and Testing*
  - o Able to convey complex pensions concepts and calculations to development and technical teams.
  - o Database: Able to design, understand and provide data and concepts for Dev. SQL, Data modelling tools and techniques.
  - o Able to understand and read code eg C#, ASP, SQL and other high-level languages
  - o Design web pages with consideration to User and Member Experience. Use applications for wire frame design.
  - o Work with external development teams at a technical level on behalf of a client.
- *Solution Development*
  - o Able to create solutions to problems based on analysis undertaken and other techniques.
- *Project and Programme Management*
  - o Project and programme management skills specific to pensions projects.
- *Review*
  - o Competent to review all aspects of other analysts/consultant's work.

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