



### Welcome to Member Insights

The Member Insights online system has been designed and built to be as intuitive as possible.

This guide walks you through how to use the system, how to use the email functionality and how to download your governance report.

You can also take a look at our introduction video.

We hope you enjoy using Member Insights.

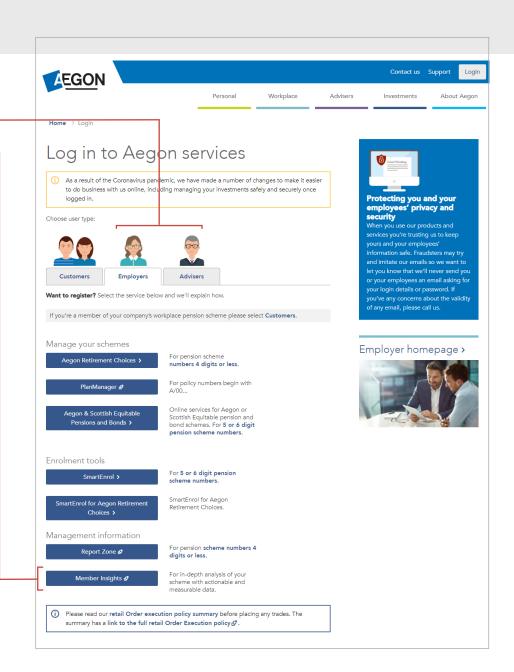
# Login to Member Insights

To access Member Insights go to <a href="www.aegon.co.uk/login">www.aegon.co.uk/login</a>

- Select the Employers or Advisers tab
- Scroll down the page and select Member Insights

You'll be taken to a login screen where you can enter your User ID and Password. If you can't remember your user ID or password click on the forgotten links.

If you need help registering or logging in, please get in touch with your Aegon contact.



# Homepage

From the homepage, there are a number of actions you can take.

At the top of the page you'll see links to:

- Your schemes
- Help and support
- Profile

These links are available throughout Member Insights.

To the right there's high level data on the report which you can use to check you're in the correct report (if you have more than one).

Below that, is the **User Guide** link, which is this document.

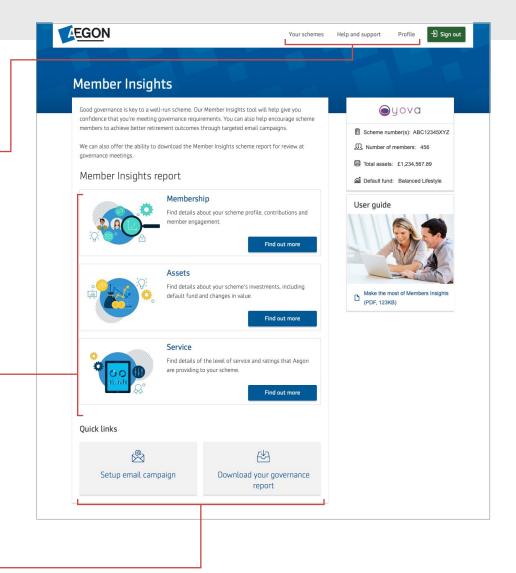
The main body of the homepage shows the links for the three main sections of the system:

- Membership
- Assets
- Service

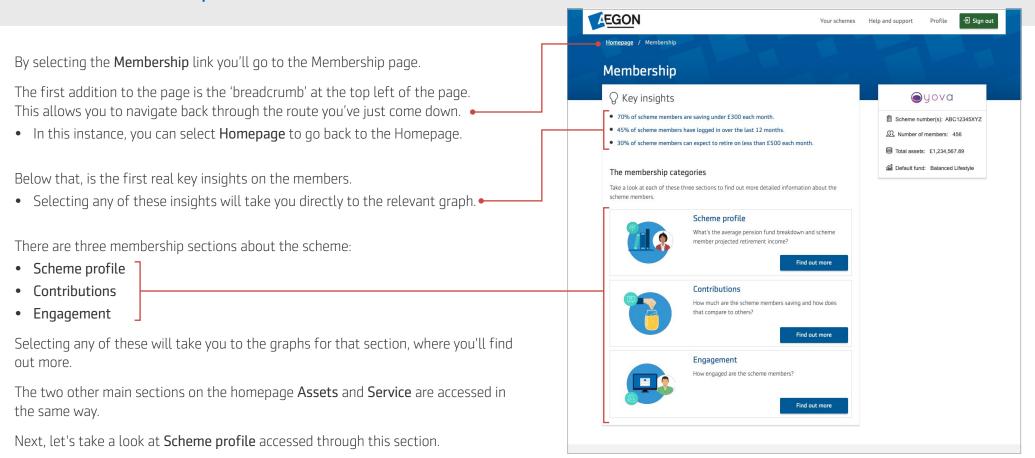
You can find out more insights about the scheme in these sections.

At the bottom of the page you can begin the process of setting up an email campaign or downloading your report.

Before we get to the downloadable report, let's take a look at the **Membership** section.



### Membership



# Scheme profile sub-section

By selecting the Scheme profile link (shown on the last page) you'll go into the Scheme profile sub-section shown here.

At the top left of the page, the 'breadcrumb' now allows you to navigate back to either Membership, or all the way back to the Homepage.

Below that, you have the key insights.

• Selecting any of these insights will take you directly to the relevant graph.

Below that you'll find the first real data insight and the high level information for Scheme profile.

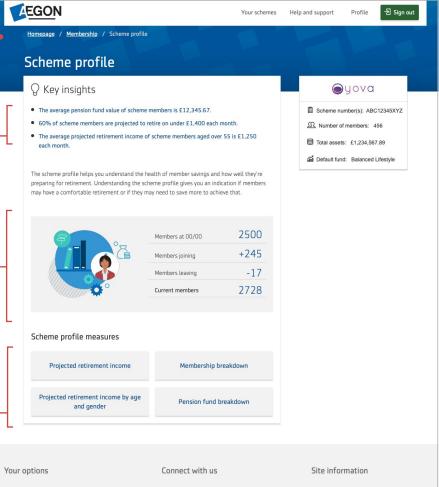
• In this example, it shows the members leaving and joining the scheme over the last 12 months

In the **Scheme profile measures**, there are the links to the graphs that are available in the scheme profile sub-section.

• Select these boxes to view the graphs and insights. •

If you want to view **Contributions** or **Engagement** you follow the same process starting from the **Membership** page.

The same process would apply when you access **Assets** or **Service** from the **Homepage**.



### Projected retirement income

**AEGON** - Sign out Homepage / Membership / Scheme profile / Members projected retirement incom By selecting the Projected retirement income by age and gender link (shown on the Projected retirement income last page), you can view the graph. yova • This shows you the banded amount your members are projected to retire on. Projected retirement income Scheme number(s): ABC12345XYZ Total assets: £1,234,567.89 Default fund: Balanced Lifestyle Thinas to consider We've used the following assumptions in the calculations: 1) The rate we've used for projecting members existing fund is 4% growth each year There's an explanation as to how we've calculated this and why it's important. • 2) Growth rate is illustrative not certain. The investment growth achieved may be more or less than this and may change depending on the funds invested 3) We've used an inflation rate of 2.5% each year Below that are links to move straight to the other graphs in this section, The Rowntree Foundation suggests that in order to have a comfortable retirement people require an income of around £1,000 each month. without the need to navigate back to the sub-section page. • . If any scheme members are projected to have an income of less than £1,000 each month, then you may want to use our email that encourages members to review their contributions Other scheme profile measures Membership breakdown At the bottom of the page, there's a link to set up an email campaign related to the · Pension fund value breakdown graph on the page. · Projected retirement income by age and gender • In this instance, selecting it takes you to a page to set up an email campaign Ouick links encouraging your members to review their contributions. • Review your contributions Setup email campaign Your governance report You can also download your paper governance report from here. All of the graph pages in Member Insights follow a similar format to that shown here, with similar functionality across each. Your options Connect with us Site information

# Email campaigns

Email campaigns can be accessed in two ways:

- Firstly, as you've already seen, by viewing a graph and setting up an email campaign based on that data.
- Or by selecting the **Email campaigns** link at the bottom of the **Homepage**.

If you access the campaigns via the **Homepage**, you'll see the full list of campaigns, and you'll be able to choose the one you want to run.

Setting up a campaign is simple:

- 1. Choose the segmentation you want such as "members saving under £300 each month" as shown in this example.
- 2. Select Run campaign. •-

An automated process will then begin:

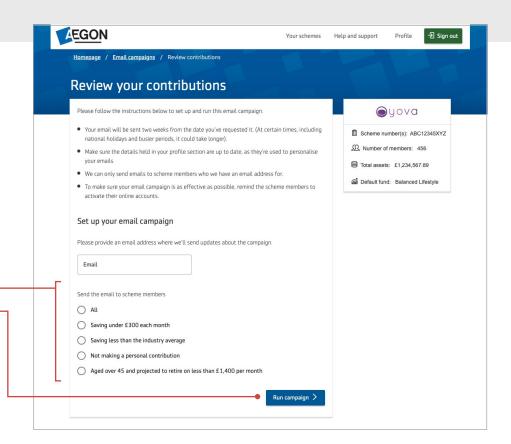
- We'll send out your campaign in two weeks' time, or as close to that date as possible.
- We'll send you a confirmation email as to when the campaign will be sent.

Prior to sending your email, please make sure you visit the **Profile** section at the top of the page and update your details.

• Some of these details will be used in your email campaign. (See the next page for details around the **Profile** section)

#### Remember:

- Only one email campaign can be sent at a time when fully completed another campaign can be sent.
- A specific email campaign cannot be repeated until six months after it was last run.



### Profile

**EGON** Profile The **Profile** section is in three parts: 1. Your logo Your logo There's an option to add in your company logo. • yova • If you add your company logo, this will show throughout the online report. (PDF 123KB) Your changes have been saved 2. Scheme information In the report name field, you can change the name that'll appear on your paper report. Scheme information In the scheme industry field you can change your scheme industry. Oracle group personal pension plan • In the report we compare your scheme with the average scheme in your industry. • If you'd rather be compared to a different one, change this, and the next time the Key contact data is updated, it'll change to your new selection. lean Smith Please then complete the key contact details, so we can get in touch if we need to. 0131 123 4567 3. Email campaign details Your changes have been saved The final section contains details we'll use to populate some of the email campaigns. • It's important this is kept up to date, if you want to get the most from your Email campaign details email campaigns. You can edit your email campaign information at any time. Please remember to save your detail before you leave the page or you'll lose any new details you provide • If these boxes are left blank, we'll populate the emails with generic Scheme name information instead. The final section allows you to populate details of the HR contact and the scheme adviser. • If these sections are left blank, the emails on consolidation and retirement options will direct members to Aegon Assist. You should agree with your scheme Telephone number adviser what details should appear here. Adviser contact iean.smith@email.co.uk

## Help and support

This section has information to help you get the most out of Member Insights. There's a fly through video, user quide and FAQs, as well as contact information for getting in touch with us, or your adviser.

### Download your report

Downloading your report is simple.

Once you select a section from the homepage, or one of the graphs, you'll get to a page where you can choose to download the report in PDF or Word format.

If you choose to download in Word, you can add your own comments or delete sections. Please remember that if you make any changes to your report, Aegon cannot take any responsibility for the content.

### Your schemes

If you have more than one report set up and would like to change which one you're looking at, select the report you want to view. If you have a large number of reports, you can search for the one you're looking for in the bar at the top of the page.

## Further quidance

Should you require further help getting the most from Member Insights, please look at the FAQs in the Help and Support section.

If you need any further assistance please get in touch with your Aegon contact.







