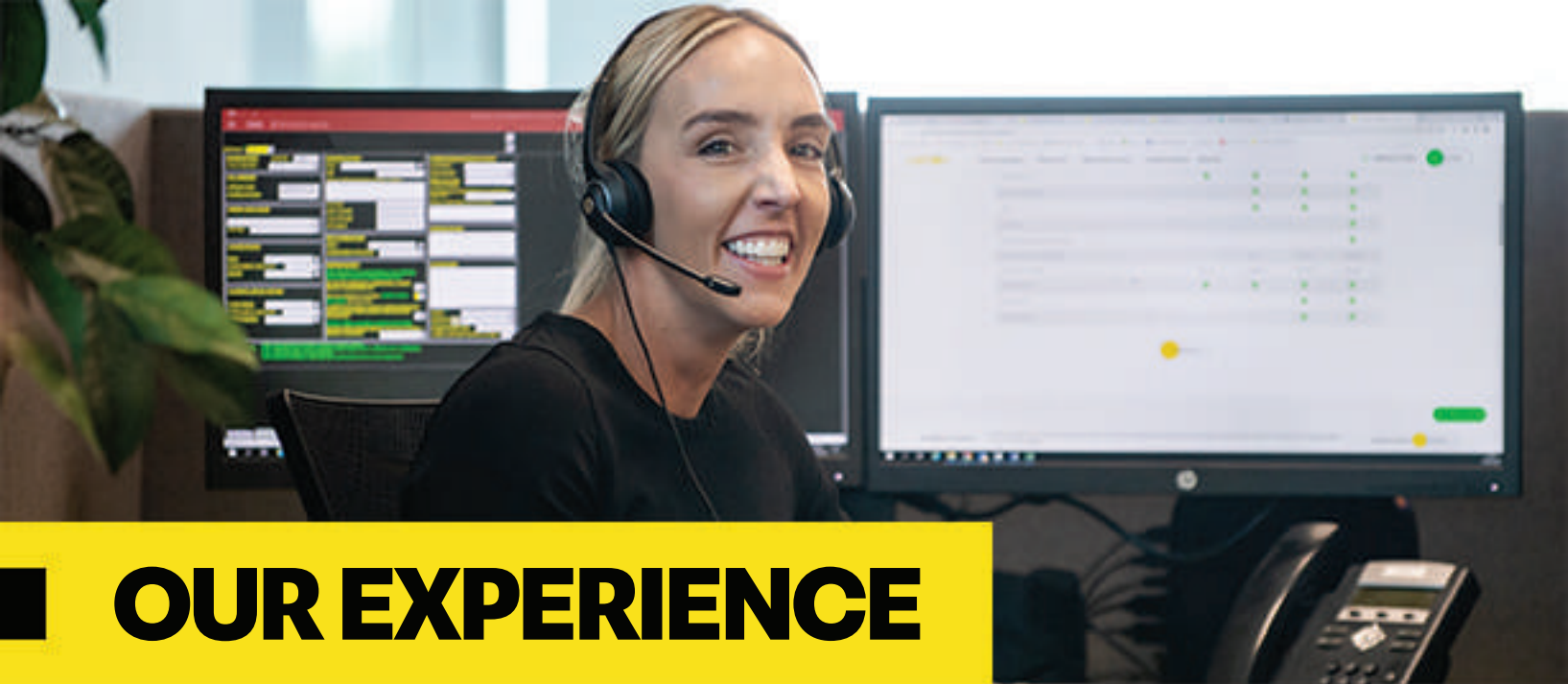




Lemon

**A LEADING CONTACT CENTRE
FOR PENSION PROVIDERS**



OUR EXPERIENCE

Lemon is a UK-based, 24/7 contact centre with over 20 years of experience delivering comprehensive support services. We work with leading pension providers across the UK, specialising in both daytime and out-of-hours solutions to help them deliver exceptional member service and operational support.

Founded in 2003, Lemon Contact Centre was established with a passion to provide world-class customer service solutions. With extensive experience in handling complex and sensitive interactions, including working with regulated financial services firms, we have the expertise to support even the most demanding pension environments.

On partnering with Lemon, our team integrates seamlessly with your in-house operations as a natural extension of your member support services. Our specialist 24/7 support ensures that your pension scheme members and operational teams receive continuous assistance, safeguarding a good work-life balance for your staff while maintaining round-the-clock availability.

Our outsourced switchboard and multi-channel contact services are designed specifically for pension providers, ensuring incoming member calls and enquiries are answered promptly and professionally. This helps you maintain a consistent, high-quality member experience while reducing the risk of missed contacts that can impact customer satisfaction or regulatory compliance. By outsourcing your contact centre to Lemon, you can extend your service availability to 24/7 without the cost of hiring additional in-house staff, providing members access to support whenever they need it.

Working with Lemon is straightforward, with stress-free onboarding and a dedicated account manager providing ongoing support from day one. Our highly trained operators follow your organisation's compliance protocols and can log interactions directly into your existing pension administration and CRM systems, backed by clear and transparent reporting, robust quality assurance, and recorded calls.

Furthermore, bespoke support tools, such as Lemon's advanced diagnostic tool and comprehensive knowledgebase, empower our operators to quickly and efficiently triage member enquiries. This facilitates higher levels of first-contact resolution and prevents unnecessary disruptions to your pension scheme administration.

“ Here at Lemon, we pride ourselves on our ability to support pension providers with 24/7 member communication services designed to enhance operational efficiency and deliver seamless, professional assistance to both scheme members and administration teams. ”

Martin Anderson
Co-Founder & CEO





WHAT WE DO

Call Answering

We combine cutting-edge technology with the passion and professionalism of our agents to deliver a responsive and dependable service. Our approach enables real human connections powered by real conversations, with a focus on readily available, timely support for pension providers managing member enquiries, urgent pension-related matters, and operational queries. Our outsourced switchboard services ensure every incoming call to your pension scheme or administration team is answered promptly and professionally, reflecting your organisation's standards.



Email Management

At Lemon, we help you harness the power of email to enhance communication efficiency and improve the overall member and operational experience. Our team handles incoming emails promptly and professionally, ensuring that communications from scheme members, trustees, and pension administrators are managed with the same care and attention as our phone services.



Messaging Apps & SMS

Messaging apps provide an efficient and secure platform for communicating with pension scheme members and administration teams. By utilising popular messaging services such as WhatsApp and Facebook Messenger, Lemon supports pension providers with real-time, convenient communication channels that meet today's expectations while maintaining confidentiality and strict data protection compliance.

Web Messaging

We help integrate web messaging into your member service solutions, enabling scheme members and administrators to reach out directly through your website. This facilitates real-time conversations without the need for phone calls, providing a convenient communication option valued for quick assistance, pension updates, or appointment scheduling.



Business Process Outsourcing

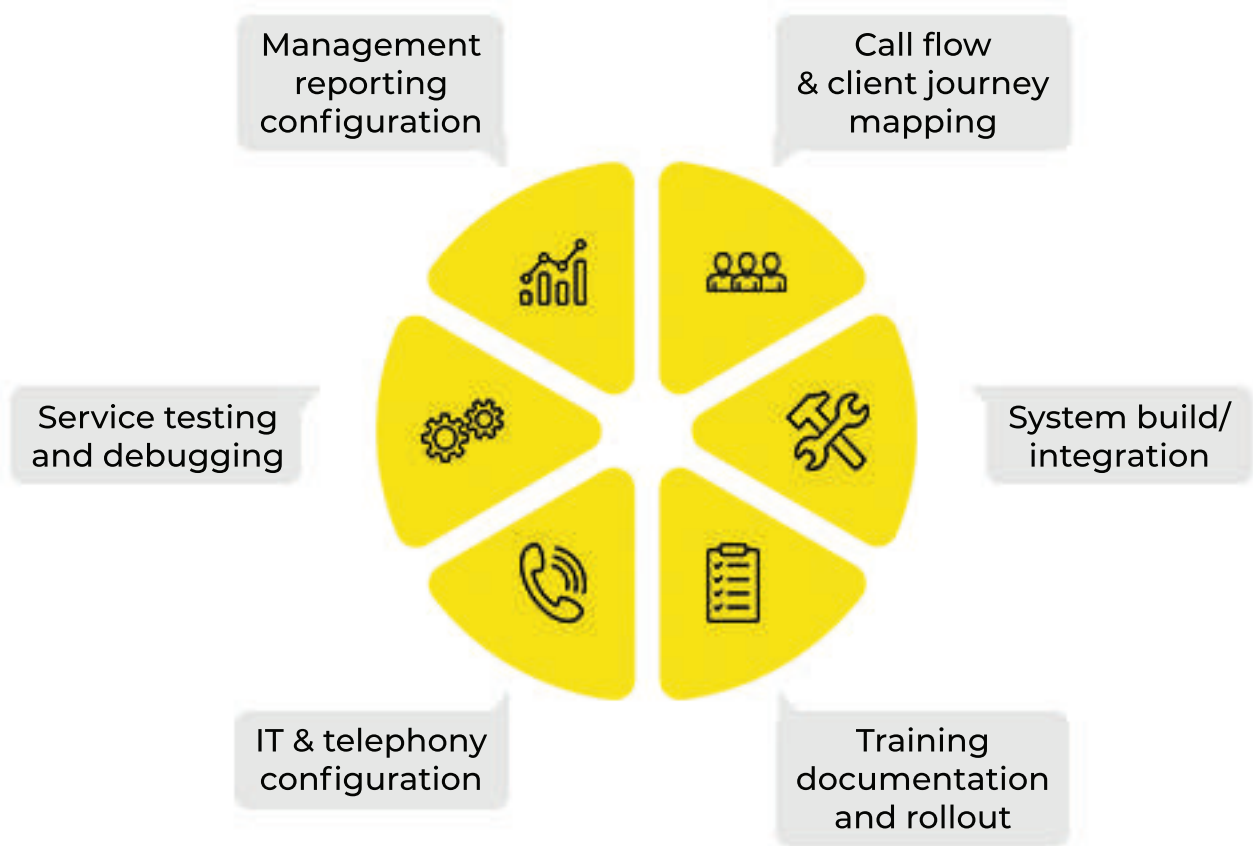
Our business process outsourcing (BPO) services provide pension providers with a comprehensive, efficient solution to manage member communications and administrative challenges. We take on various back-office functions, freeing up your in-house teams to focus on pension scheme management while ensuring smooth service delivery and operational efficiency.



■ MOBILISATION MADE EASY

At Lemon, we take pride in delivering a seamless transition for both you and your clients. From day one, a dedicated account manager will be assigned to your project, working closely with you to coordinate all required resources and ensure adherence to the agreed mobilisation timeline.

Guided by the six key segments of our on-boarding plan, they will focus on providing a first-class implementation experience and maintaining excellence throughout our partnership.



HOW LEMON CAN SUPPORT PENSION PROVIDERS

Expert Omnichannel Member Support

We provide 24/7 omnichannel communication solutions including phone, email, SMS, WhatsApp, Facebook Messenger, and web messaging. This ensures your pension scheme members receive prompt, professional, and consistent support for enquiries, updates, and urgent matters anytime, enhancing member satisfaction and accessibility.

Seamless Integration & Compliance

Our contact centre integrates smoothly with your pension administration and CRM systems, ensuring every interaction is logged accurately. With our ISO 9001 and ISO 27001 certifications, we maintain the highest standards of data security and compliance, essential for managing sensitive pension information in line with regulatory requirements.

Flexible & Scalable Resourcing

Through our bureau shared agent model or dedicated agents, we provide scalable support that adapts to fluctuating call volumes or specific project needs such as pension scheme launches or regulatory changes. Our flexibility helps you avoid service disruptions without the need to over-hire or manage large internal teams.

Reducing Operational Risk & Supporting Governance

By partnering with us to outsource member communications and administrative contact functions, you can mitigate key person risk and reduce your administrative burden. We deliver reliable service continuity that supports your pension scheme governance and operational resilience, allowing your internal teams to concentrate on strategic priorities.

Enhanced First Contact Resolution & Efficiency

Using our advanced diagnostic tools and comprehensive knowledgebase, our operators efficiently triage calls and enquiries. This maximises first-contact resolution rates, reduces unnecessary escalations, and ensures smoother pension administration operations, ultimately improving overall member experience and your operational productivity.



TECHNOLOGY

At Lemon, we are dedicated to delivering exceptional member service solutions for pension providers by combining top talent with cutting-edge technology. As part of this commitment, we have made substantial investments in our technology infrastructure to support the unique demands of pension scheme administration.

Our investment includes migrating our infrastructure and systems to the cloud, deploying the world-class Genesys Cloud contact centre platform, and implementing Grafana, an accessible analytics and interactive dashboard application. These advanced technologies empower us to provide unparalleled service, real-time monitoring, and actionable insights tailored to the needs of pension providers.

We work closely with pension schemes and administrators to identify and implement the optimal technology solutions needed to deliver exceptional member support, whether integrating seamlessly with existing pension administration systems, CRM platforms, or leveraging our Genesys Cloud platform. Our offerings are enhanced by bespoke tools such as our proprietary database, diagnostics tool, and comprehensive knowledgebase applications designed specifically for pension workflows and member communication protocols.

Our technology is built for seamless integration, and our agents are highly skilled at operating across a variety of third-party pension systems, ensuring efficiency, accuracy, and adaptability in every interaction. This enables us to support critical functions such as member call handling, urgent pension matter escalation, appointment coordination, and confidential communication with agility and professionalism.

IntelliPen®

CIVICA

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We are committed to upholding and exceeding international standards in the form of ISO certifications, as well as PCI DSS compliance for secure card payment processing and GDPR compliance for data protection. Furthermore, our ISO certifications are awarded by UKAS-accredited auditors, providing you with complete confidence in the quality and security of our services.

When you outsource, you entrust a third party with access to your data. At Lemon, we have the expertise and robust technical controls necessary to ensure its safety and security.



ISO 9001 – Quality Management

ISO 9001 outlines a comprehensive quality management framework that underscores our commitment to service excellence. It ensures we consistently meet customer expectations while fostering continuous improvement in our performance.



ISO 27001 – Information Management Security

ISO 27001 is the globally recognised gold standard for securing information. Achieving this certification demonstrates our unwavering commitment to safeguarding your information assets, giving you peace of mind that your data is protected.

“ Partnering with Lemon Contact Centre has greatly enhanced our pension member service and operational efficiency. They are a trusted partner that consistently delivers secure, high-quality support tailored to our business. ”

Leading Pension Provider



SERVICE PACKAGES

	BRONZE	SILVER	GOLD	PLATINUM
Dedicated agents				✓
Shared agents	1000 mins	>1000 to 5000 mins	>5000 mins	Overflow optional
24/7 support	✓	✓	✓	✓
Call handling	✓	✓	✓	✓
Email management		✓	✓	✓
SMS		✓	✓	✓
Web messaging				✓
Messaging apps (e.g. WhatsApp)				✓
Third party systems and portals		Up to 5	Up to 5	Unlimited
Service level reviews	Biannually	Quarterly	Monthly	Weekly
Standard SLA	✓	✓	✓	✓
Bespoke SLA			✓	✓
Live dashboard			✓	✓
On-call matrix	✓	✓	✓	✓
Triage tool			✓	✓
Knowledgebase			✓	✓
Call recording	✓	✓	✓	✓

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**Lemon Business Solutions Ltd is a company registered in England and Wales with
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