

# 10 STEPS TO AUTO ENROLMENT SUCCESS



## 1 KNOW YOUR KEY DATES

Auto Enrolment is deadline driven and it is very important that you get on top of all of the important dates that affect your company.

## 2 CREATE A PROJECT TEAM

You will need a combination of Pension, Payroll and HR knowledge to get Auto Enrolment delivered safely.

## 3 ASSESS YOUR WORKFORCE

Under Auto Enrolment rules you will need to assess your workforce every time you pay people and ensure that workers are categorised in the correct way.

## 4 PUT IN PLACE A QUALIFYING WORKPLACE PENSION SCHEME (QWPS)

This could be the first scheme in your company or you may have an existing scheme that needs to be reviewed. Either way you need to select a good quality Workplace Pension Scheme into which you enrol your workers.

## 5 REVIEW YOUR PAYROLL SYSTEMS AND PROCEDURES

Whether you run payroll in house or outsource to a bureau, you need to be sure the system can cope with Auto Enrolment.

### FOCUS

### PLAN

### IMPLEMENT

## 6 COMMUNICATE WITH YOUR WORKFORCE

Pensions are hard enough to communicate at the best of times but Auto Enrolment will have piqued the interest of many workers and so you need to ensure you communicate clearly and thoughtfully.

## 7 HIT YOUR STAGING DATE (OR POSTPONEMENT DATE)

You need to be ready to hit the ground running on your Staging Date. This is the date on which your legal duties really start.

## 8 DECLARATION OF COMPLIANCE

You have 5 months from your Staging Date to register with TPR. Registration can be a time consuming process, especially for the uninitiated, so it makes sense to leave plenty of time to complete.

## 9 RECORD- KEEPING

Employers have a legal requirement to ensure that certain Auto Enrolment records are kept.

## 10 BUSINESS AS USUAL

Auto Enrolment is not a one-off project, it's something you will need to get used to on an ongoing basis.



**INTERESTED TO LEARN A BIT MORE ABOUT THESE 10 STEPS?**  
[CLICK HERE](#) FOR A MORE IN-DEPTH GUIDE TO **AUTO ENROLMENT** SUCCESS.