



# Strategic Advisory

Supporting superannuation funds through constant change  
with a specialised strategic advice capability



March 2021

# Introduction

## An ever-changing environment

The superannuation sector is in a state of continuous and accelerating change. Factors driving change include:

- ▶ a regulatory environment promoting mergers and acquisitions;
- ▶ an APRA focus on measurement and performance reporting;
- ▶ an ASFA focus on small funds; and
- ▶ a drive towards 'digital first':
  - changing the way both super funds and providers think about the future of servicing in a complex environment; and
  - striving to increase automation, reduce costs and at the same time improve service by taking ownership of member and employer experiences.

## What superannuation funds desire

Funds require expert strategic planning in order to develop robust frameworks for:

- ▶ understanding and defining member outcomes,
- ▶ designing and implementing changes, and
- ▶ evaluating performance over time.

The increasing requirements for detailed legislative reporting requires a focus on data architecture in order to:

- ▶ access and integrate data completely and correctly, and
- ▶ provide an accurate assessment of a Fund's (and its product's) performance.

The pressure on super funds to develop 'future proof' plans, whilst executing both strategic and operational change, has led to an increased demand for guidance and advisory services. **Funds are relying on support from trusted partners** to navigate the ever-changing landscape and operating model options.

# IQ Group, a trusted partner

There are five essential focus areas where super funds require guidance and support:



IQ Group are experts at understanding and managing the impacts of legislative and regulatory change within each of these areas. Our people are of the highest calibre within the industry and are proficient in tailoring advice for each individual client and supporting them to identify all opportunities whilst planning for the future.

Aside from accommodating changing requirements, we ensure our strategic advice capability is second-to-none by recognising both national and global challenges that apply to the superannuation industry. We draw on innovations from a diverse range of industries and create solutions that are bespoke for each client.

Whilst clients may only require advisory support in one area, our **Strategic Advisory Group** work together to ensure each of our clients, and subsequently all superannuation members, achieve the best outcomes possible both now and in the future.

**Working with IQ Group, means you are working with a well-established and trusted partner. A partner that will stay with you until change is implemented and your goals achieved.**

# Strategic Advisory Group

Katherine Forrest

**Leader, Strategic Growth and Capability**



Katherine has extensive knowledge across the superannuation domain. She has deep sector experience from strategy, products, operations and administration. Katherine also has an exceptional reach across the sector having formed strong relationships across the range of administrators, consultancies, solution providers and the Funds themselves.

George Liras

**Mergers and Acquisitions**



Over the past 18 months, George has been IQ's lead consultant in merger and acquisition activities working with our key clients. He is currently leading the due diligence process for two merging funds.

George has 25 years' experience working in the superannuation and financial services industry, including management and senior roles. These roles have spanned many areas of the superannuation and wealth including Operations/Administration, Business Systems and Analysis, Product Development and Strategy and Program Management.



There is no standard approach.

Each client creates an individual pathway to success.

Sharon Camponaro  
**Organisational Change, Culture and Learning**



Sharon brings to IQ Group her experience of working at LINK and TAL where she was an accomplished and versatile leader who thrived on empowering teams to deliver quality outcomes. A strategic thinker, with extensive stakeholder management and people leadership capabilities, Sharon is leading multiple change management and learning initiatives for some of our key clients.

Her focus is on change and learning, but her value to organisations is her accumulated knowledge through working to deliver operational excellence, customer satisfaction, profitability, and market presence. Sharon has an impressive record of success spanning over 24 years in the financial services industry where she has held various senior leadership roles, including Operational Management, Client Relationships, Risk and Compliance, and Service Quality and Training.

Glenna Forrest  
**Operations and Operating Models**



Glenna recently joined IQ Group from Mercer where she was Head of Administration Operations AUS/NZ.

Glenna is a highly experienced and passionate Operations Leader with over 25 years' experience leading successful teams in the superannuation and financial services industry. A proven history of transforming operational businesses and leading large delivery teams to achieve their full potential. Glenna's biggest strengths lie in developing strategies and capabilities that maximise growth and operational efficiencies and drive excellent outcomes for all stakeholders.



We are here.  
We will stay with you until we see change implemented and your goals achieved.

## John Hogan Data-Driven Insights and Decision Making



John joined IQ Group in late 2020 to lead our data driven insights initiatives. Throughout his career, John has led the creation and implementation of frameworks, data strategies, service level agreements and target operating models to support data driven decision making and insights. John is a results oriented professional experienced in delivering, supporting and selling data driven solutions. He combines this experience with his end-to-end knowledge of the complete investments data chain.

## Mal Collins and Chris Randle Digital Strategy and Architecture



Mal is a digital leader who works with customers to enable technology that will deliver business outcomes aligned to corporate strategy. Since joining IQ Group in October 2019, Mal has led IQ's architecture engagements. He was the architecture lead in a major industry fund merger providing a focus on capability models and transformation architecture. Recently, Mal has been performing the role of Enterprise Architect for another industry fund embarking on a major digital transformation.



Chris joined the IQ group in January 2021 from KPMG, where he was an Associate Director in their Strategy and Architecture practice. Chris is a highly motivated and respected enterprise architect with over 20 years of industry experience both locally and internationally. He has extensive experience with large scale transformation programs and works directly with both strategic decision makers and technical delivery teams. Prior to his current role, he has consulted as an Enterprise Architect to superannuation, life insurance and wealth management clients, reviewing their existing enterprise architecture and establishing and delivering various programs of work.



**Future proof.**  
Delivering change  
for the best possible outcomes  
today and into the future.



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