

Customer success story

PensionBee

How RiskSmart worked with PensionBee to shape our product and become an integrated GRC tool **supporting scaling businesses.**



PensionBee

Petra Miskov | CRO

PensionBee is on a mission to build pension confidence and create a world where everyone can enjoy a happy retirement. They enable customers to access their pensions easily, whether that's transferring their old pensions and investing them into a brand new online plan or withdrawing with ease from age 55 (rising to 57 in 2028).

Company

PensionBee

Industry

Pension

Location

London, UK and New York, USA

Size

Over £5.5bn assets under administration* and 260,000 Invested Customers.

*September 2024

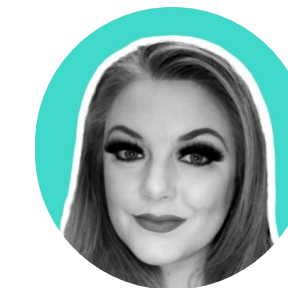
[Book a demo](#)

PensionBee's goals

PensionBee's impressive success in revolutionising and simplifying pensions means the company has made financial security and freedom possible for their more than 260,000 Invested Customers. But growth doesn't come without responsibility, and for PensionBee's risk and compliance teams the growth spurt meant moving away from spreadsheets and needing a more robust tool for policy governance, risk management and more. They looked for a new integrated solution.

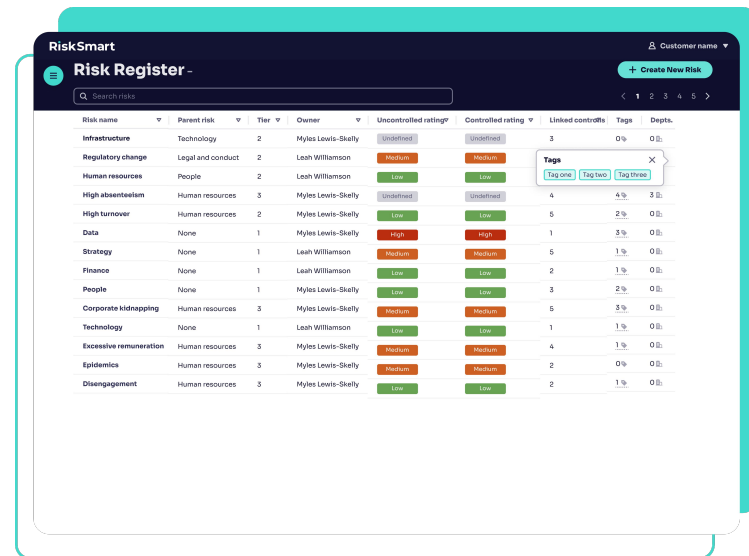
That's when the team found RiskSmart.

“RiskSmart worked closely with the PensionBee's teams to shape our Policy module into a powerful and adaptive tool. We received expert guidance from their Risk team, and our collaboration is a perfect example of how a partnership can create powerful tech, whilst setting a customer up for success.”



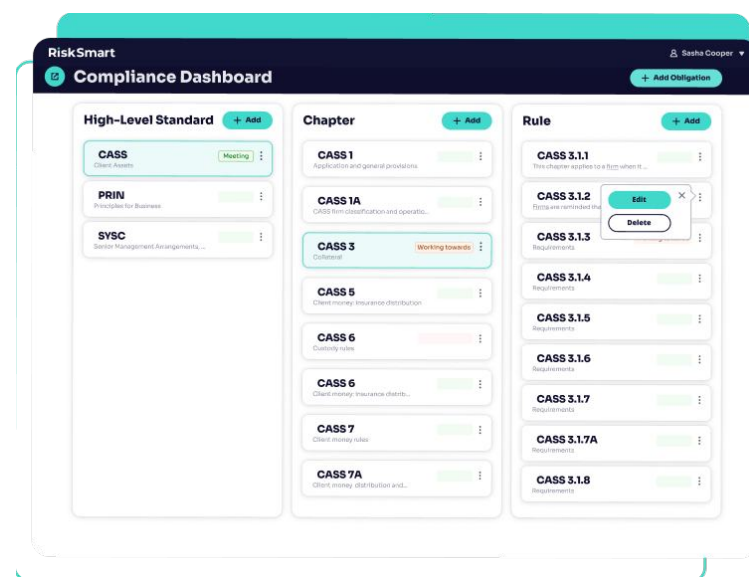
Emma Bamford,
Head of Customer Success
RiskSmart

Modules & functions used by PensionBee



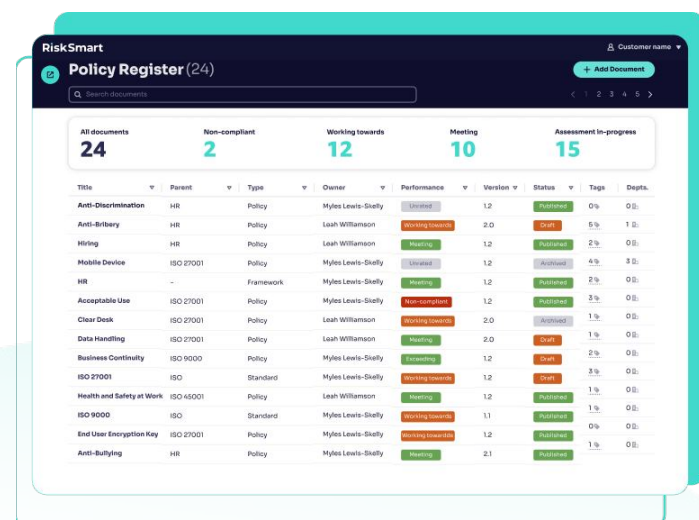
⚡ Enterprise Risk module

- Measure, score, and monitor business risks effectively.
- Stay ahead of potential threats with our intuitive tools.
- Strengthen your risk culture and empower the business.



✅ Compliance module

- Prove your compliance with regulatory obligations and accreditations with ease.
- Ensures you can demonstrate adherence to regulators and auditors, giving you peace of mind and confidence.



📄 Policy module

- Simplify policy management
- Seamless review and approval workflows.
- Integrate with existing platforms (Sharepoint, GoogleDrive).
- Maintain a clear review dashboard and control publishing.

RiskSmart is highly customisable, and our modules can be used on their own, or combined as a powerful tool for your integrated risk management framework.

[See all our modules](#)

Their return on investment

Helped strengthen the risk framework via an integrated approach

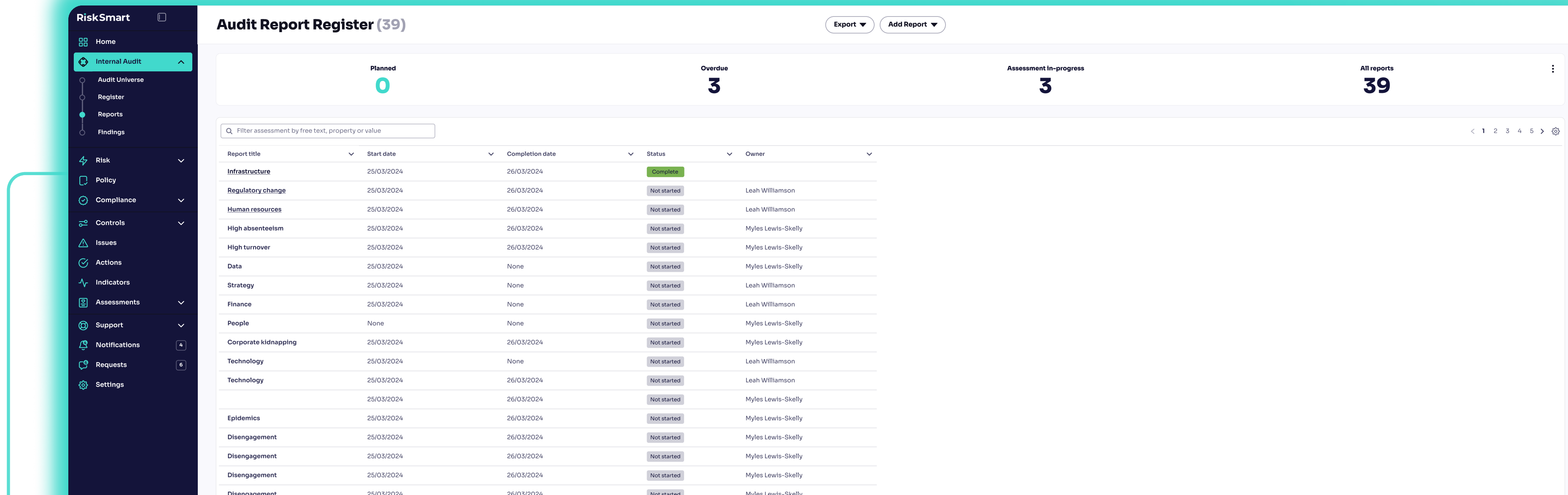
Saves time on RSCA

Helped the risk team break down silos and facilitate risk culture

RiskSmart's solution

Since PensionBee have started using RiskSmart, they have reduced the need for spreadsheets and the use of siloed systems, meaning their risk, compliance and policy data is safely stored and streamlined in the RiskSmart platform. This has enabled the PensionBee Risk team to strengthen their risk framework, supporting growth and protecting the assets they administer for their customers.

PensionBee challenged RiskSmart to expand its offering to include an integrated policy and document management module in addition to risk and compliance modules. PensionBee's highly skilled risk team helped RiskSmart build our Policy module to the highest specification, and the successful partnership resulted in PensionBee using RiskSmart across departments and streamlining their processes to enable scalability as the company continues to grow.



“ Working with RiskSmart, the PensionBee team became involved in shaping the system’s modules. In our experience the RiskSmart team is agile, highly receptive to feedback, and they share our philosophy of simplicity and practical risk management. It’s been a productive and collaborative relationship.

”



Petra Miskov
CRO
PensionBee

Summary of the PensionBee customer story

The PensionBee and RiskSmart success story is an example of how a provider and customer can work together to create an innovative and effective product, producing valuable outcomes for both sides. In addition to rolling out RiskSmart as their risk management tool, the collaboration has made it possible for PensionBee to streamline their processes to enable scalability as the company continues to grow.

From RiskSmart's point of view, we're thrilled to see our collaboration with PensionBee continue and result in further system developments. Their expertise and inspiration have been invaluable for us in shaping our product, and we feel privileged to work with them.



Some of our other customers

