

From overwhelmed to organised

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4 Minute Read



Finding clarity, purpose and controls in a crowded project landscape.

The weight of change

Across the pensions world, 2026 brings no shortage of activity. Buy-ins and buy-outs, dashboards, data rectification, GMP equalisation, regulatory reform, ESG reporting - each important, each drawing on the same limited people and systems.

Even well-resourced schemes are feeling the strain. Projects pile up, timelines overlap, and the flow of information between parties begins to fragment. What starts as purposeful delivery can quickly feel like constant firefighting.

The real anxiety is knowing whether the scheme remains on course to achieve its objectives, when visibility itself is the first casualty.

When lines are blurred – projects meet business as usual

One of the clearest signs of overwhelm appears where lines between project work and business-as-usual begin to blur, losing an important segregation. The same key people are often pulled between project delivery and day-to-day operations, creating

bottlenecks and key-person dependency.

Tasks slip, or are left unfinished. Accountability becomes diffuse, priorities ambiguous. The result is a cycle where effort increases but progress slows.

Clear visibility of all work, presented in a form that's easy to digest, makes it possible to spot pinch points early enough to take action and protect both project and BAU delivery.

Where there are multiple advisers and an outsourced administration service, the challenge multiplies. Different firms operate on different calendars, using their own definitions of "project" and "BAU". Everyone is busy, yet no one can see the whole picture.

Lost in translation – when language and systems don't align

Even when intentions are clear, communication often isn't. The pensions world is full of acronyms and shorthand that can mean subtly different things across organisations. Terms such as go-live, true-up or handover can represent distinct stages depending on who's speaking. Layer on top of that the language of project management - milestones, dependencies, RAGs, agile, scrum - and the risk of misinterpretation multiplies.

Add to this a patchwork of systems: one firm managing tasks in MS Project, another tracking progress in spreadsheets, a third updating its own online portal. Each may be well-run individually, yet without a shared plan, it is an environment where assumptions diverge and dependencies can be missed. Teams often end up working in silo, amplifying fragmentation and making coordination harder.

Without shared definitions and a single source of truth, project reporting needs translation.

The hidden cost of confusion

When control slips, cost follows. Fragmentation breeds duplication; duplication consumes time and for your team, can also lead to frustration.

The financial consequences are subtle but cumulative: adviser time used inefficiently, projects extended beyond budget, decisions revisited

because earlier ones weren't visible. The human consequences are equally real - teams working longer hours to stand still, morale dropping as progress feels elusive.



And behind it all sits a deeper problem: resourcing blind spots. When project and BAU work aren't clearly separated, it's impossible to know whether the organisation is properly resourced. People appear fully allocated and decisions about recruitment or outsourcing are made on perception rather than fact and with it, longer-term cost-effectiveness quietly erodes.

Most seriously, disorder increases risk. Controls become harder to maintain, and the assurance that Trustees and sponsors rely on starts to fade. No one chooses this position; it evolves slowly from good intentions stretched too thin.

The effects often surface as missed milestones, shifting timelines, fingers pointed and repeated explanations. These aren't usually signs of poor intent but of hidden strain - the cumulative impact of unclear roles, competing priorities and over-stretched resource. The challenge is to see those patterns objectively, without adding more work to already-pressured teams.

The need for a plan that holds it all

Ultimately, recovery may depend on having an overarching plan that connects every moving part. A single, integrated view of activity can provide the

foundation for effective resource management, reporting and decision-making.

Good planning also supports continuity. When responsibilities, dependencies and progress are clearly mapped, identifying key person risk, and planning for succession becomes simpler.

Recovering the position

The first step in recovery is to understand the situation as it really is; to pause long enough to see clearly, without the noise and pressure of keeping everything afloat. This may mean inviting an independent perspective that can observe without judgement and identify where effort is being lost. Done well, such a review relieves pressure rather than adds to it.

Making complexity visible – the POAP

Clarity often comes not from new information but from seeing what already exists. Consolidated roadmaps, shared glossaries and plan-on-a-page (POAP) visuals help everyone grasp in seconds what dozens of spreadsheets or acronyms obscure.

But visuals only work if they sit on something deeper. A POAP done well presents a clear, high-level view of a detailed plan that has already been discussed, tested and agreed between the client and the key parties involved. Done poorly, it becomes a superficial view that hides uncertainty and can give trustees false confidence.

Trustees won't need to see every line, but only when the POAP is generated directly from an underlying and robust plan, can they be confident the single view reflects the plan at an appropriate level of detail.

Thriving through clarity

When a programme is organised, something subtle but important happens. Delivery becomes more predictable. Teams have space to plan, not just react. Communication with trustees and members feels confident and transparent.

A team that delivers economically, efficiently and on time doesn't just avoid problems, it builds trust. It strengthens relationships across firms, improves the

quality of decisions, and ultimately provides a better service to members and trustees alike.

And perhaps most importantly, it creates a calmer, more sustainable working environment. With the right structure, guidance and tools, work becomes purposeful again, not a strain but a rhythm. Clarity, once restored, benefits everyone involved.

From overwhelmed to organised – what next?

The consequences of being overwhelmed are real — higher costs, lost time, resourcing uncertainty, and rising risk. But they are not permanent. With shared language, consistent tools and focused support, organisations can move from reaction to control.

Start with one question:

Do we have a single, clear view of all our work that we trust?

If the answer is no, that's your first step. Build that view. With the right guidance, support and vision, clarity grows, decisions get easier, and pressure starts to ease.

The difference is felt not just in reports and dashboards, but in calmer meetings, clearer roles and a sense that the scheme, and those managing it, are in control.



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