



**At the Heart of
Orchestrating
Digital Change**

Realizing the Digital Vision with Pega

CASE STUDY

Synopsis

Increasing operational effectiveness and enhancing customer satisfaction are at the heart of upgrading the existing Pega environment. That is why a leading investment banking and financial services group reached out to us for a Pega upgrade in their quest to deliver a superior customer experience. The upgraded Pega platform, shaped by new ideas, delivered more value, marking the first Pega 7 upgrade in the APAC region.

About the Client

One of the largest Australian investment banking and diversified financial services groups, the client has more than 14000 employees, offices in 28 countries and revenues of \$ 6 billion (FY 2014).

Business Challenge

The client had four business areas, 20 processes, and 10 integration touchpoints that operated on

PegaRULES Process Commander 6 (PRPC 6). The bank decided to upgrade the system in order to improve the digital capabilities and enrich their customers' omnichannel experience. It wished to build new applications and enhance functionalities along with the upgrade, which involved a huge customization and coding effort. The transformation included defining an accurate roadmap for the upgrade, executing the upgrade without impacting the ongoing enhancements and releases, integrating it with multiple in-house systems, and ensuring data security, compliance, and policy requirements adhered to the standards of the banking industry.

To address these challenges, the client needed a partner with extensive experience in Pega upgrades and mature superior migration methodologies. After considering various key Pega technology players in the APAC region, we were approached to lead the project.

Our Solution

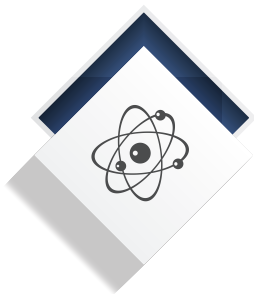
As a trusted member of the Pega Upgrade Innovation Center, we conducted a detailed audit of the client's existing systems and processes in order to revamp the PRPC capabilities. Our Pega certified consultant base first prepared a roadmap for the upgrade, with a view to ensuring there were minimal disruptions to the business. Next, the upgrade to the new Pega 7 environment was carried out, migrating existing rules from PRPC 6, running upgrade scripts, and building new features into the environment. The technology upgrade ensured the end-to-end business workflow was aligned to the existing requirements of the bank. The Pega 7 version gave users the flexibility to continue using enhanced functionality in the application with a more responsive user interface compared to PRPC 6.

The 'Foundation' process in Pega 7 provided the client a set of basic business services and utility services that automatically created cases upon receipt of fax, email, scanned mail, online and internal event triggers.

Delivering More Value

Our engagement team, with proven upgrade methodologies, was able to complete the upgrade within 12 weeks as against 15-18 weeks proposed by other players.

- ◆ **More Savings:** With uninterrupted functioning of business processes, the application downtime was reduced.
- ◆ **More Satisfaction:** We enhanced the digital capabilities of the client—delivering a superior customer experience. There were zero defects after the upgradation. Post upgrade, the user base of the client increased to 128% of the original.
- ◆ **More Convenience:** The responsive user interface enabled the bank's stakeholders to conveniently access the application on various devices.
- ◆ **More Customization:** The dashboards developed for the management leveraged more than 36 chart types and drilldown features of the Pega 7 platform.



The Incessant Technologies Advantage

Our deep domain expertise and proven upgrade methodology together with the team's stringent project management approach ensured a smooth transition to the new Pega 7 version for the bank. We leveraged BPM's next generation features to deliver enhanced digital capabilities and automated systems to the client.

For more information, write to contact@incessanttechnologies.com

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