

Rapid Delivery & Immediate Business Value

National Bank of Canada goes Live with
Pega Smart Investigate on the Cloud



Today's Presenters



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The Future of Cross-Border Payments

**Proliferation of
Payment Rails**

**Real-Time
Payments**



**Transparency &
Traceability**

**Frequency of
Change**

Challenges

Infrastructure

Cost

Data Quality



Exceptions

**Customer
Experience**

The Solution: Pega Smart Investigate

What:

An industry leading payment investigations solution to help resolve inquiries and exceptions within the Corporate & Investment Bank, typically associated with high-value and/or cross border payments made on behalf of medium/large corporates or banks.

Where:

A Pega Smart Investigate (Pega SI) system is typically implemented within a Corporate & Investment Bank (C&IB), sometimes referred to as a Wholesale Bank.

Who:

The primary users of Pega SI are back-office operations personnel. Stakeholders of Pega SI outcomes range from customers to Corporate Treasurers.

Value Proposition:

The research and resolution of Exceptions & Investigations is a complex, long running and manually intensive process. Pega Smart Investigate applies AI, business rules and process automation to significantly reduce that effort, translating to anticipated effort and cost reductions of 30-50%.



Results:

- Streamlined payment investigations for the Retail Bank's Wealth Management business.
- NBC was the first Pega client to successfully deploy Pega Smart Investigate on the Pega Cloud.
- NBC is among the first banks in Canada to go live with ISO 20022 integration on the Pega SI solution.
- NBC has significantly reduced manual intervention in payment exceptions processing through the strategic utilization of out-of-the-box Pega Smart Investigate features, a significant increase in automated workflows, and automation across multiple messaging channels and formats.
- NBC has thus far achieved a **34-35% efficiency gain** from the implementation of a Pega Smart Investigate solution. The implementation at NBC has facilitated frictionless payment investigations, thus far providing a commendable **50% reduction in Average Time to Investigation Resolution**.
- The innovation journey at NBC is ongoing. NBC's planned enhancements to extend and expand straight-through processing promise even greater efficiency gains in the future.

Why EvonSys? Pega-Recommended Partner



- EvonSys team members helped Pega build the Smart Investigate framework and have been implementing Pega since 2004.
- Recent framework enhancements include the SWIFT GPI implementation in Smart Investigate.
- 20+ years of delivering SI and Payment Exceptions & Investigations solutions to Top 20 Global Banks.
- Official partner of SWIFT.
- EvonSys has an established global practice with 700+ Pega professionals and offices in multiple global locations.
- EvonSys executives and senior leaders possess deep industry knowledge and experience, with proven records of real-world success.



Global Elite
Partner

Why EvonSys? Proprietary Components



- **ESSI Accelerator**
 - Decreases build scope, effort, and cost; increases the probability of success and improves the predictability of a go-live event; reduces the go-live timeline by 4-6 weeks.
- **ESSI Correspondence Framework & Rich Email Functionality**
 - Business driven, real-time template creation accelerates delivery and improves business agility.
 - Improves end-user productivity by providing an “Outlook-like” experience that includes Reply, Reply All, and Forward features along with easy access to email attachments.
- **Service Excellence for Commercial Banking**
 - Integrates Front- and Back-Office applications (CSFS, Sales Automation, Onboarding, Smart Investigate).
 - Provides a 360⁰ view of the customer’s Top 10 inquiries and investigations on a single, common dashboard.
 - Drive STP for crucial service inquiries, improving operational efficiency and KPI’s, and reducing average cycle time.
- **Automated Test Cases**
 - Delivers quality and speed via rich, automated test cases maintained with a no-code, spreadsheet-based model.
- **Implementation Best Practices**
 - Structured, effective discovery; Strong vision and stakeholder alignment; Consistent focus on business outcomes; Success delivered with tight teamwork, productive collaboration, and true partnership.

Q&A



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