



Rapid Delivery & Immediate Business Value

National Bank of Canada goes Live with

Pega Smart Investigate on the Cloud

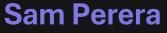


Today's Presenters



Andy Elliott

VP Product Strategy



VP of Technology



Jason Marason

VP of Innovation Moderator



Product Owner

Financial Markets, Treasury, & International Swift Payments





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:

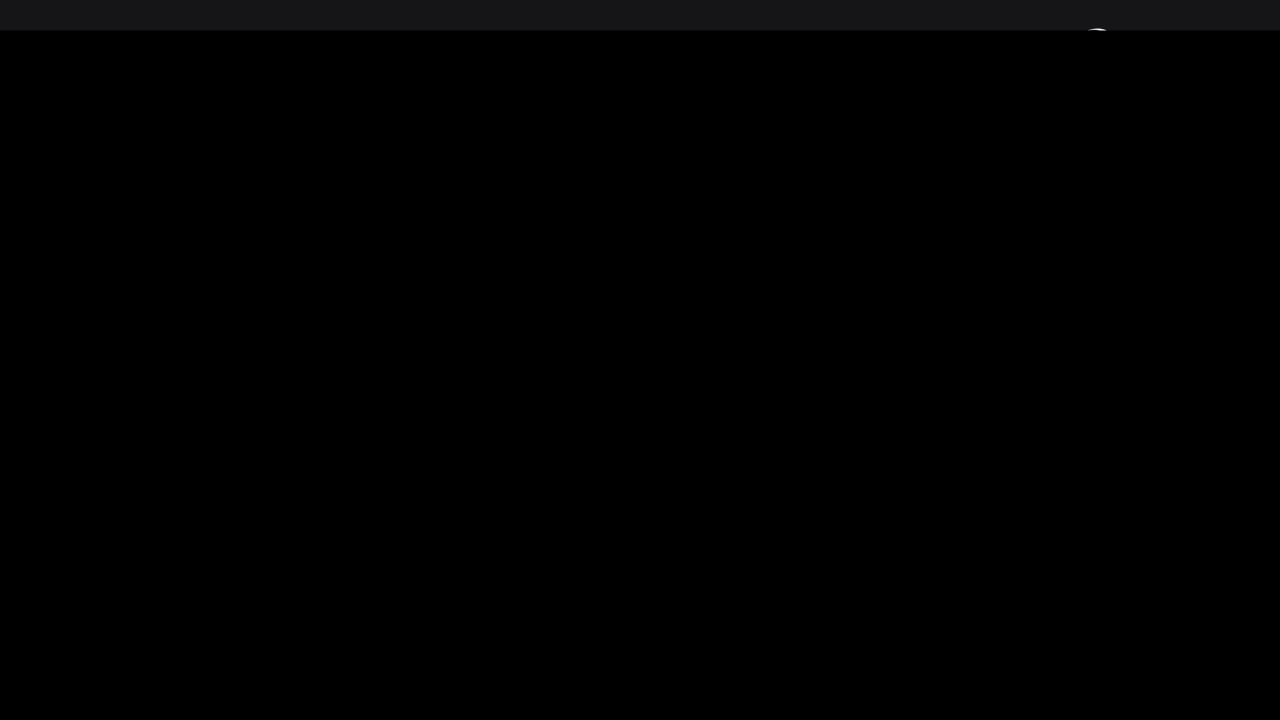
The research and resolution of Exceptions & Investigations is a complex, long running and manually intensive process. Pega Smart Investigate applies AI, business rules and process automation to significantly reduce that effort, translating to anticipated effort and cost reductions of 30-50%.

Pega Smart Investigate @ NBC



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 straightthrough processing promise even greater efficiency gains in the future.



Why EvonSys? Pega-Recommended Partner @EVONSYS



- EvonSys team members helped Pega build the Smart Investigate framework and have been implementing Pega since 2004.
- Recent framework enhancements include the SWIFT GPL implementation in Smart Investigate.



Global Elite Partner

- 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.

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 360° 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.







Wilmington, DE USA | www.evonsys.com | info@evonsys.com | est. 2015