



BUILDING AN AUTOMATED RETIREMENT APPLICATION PROCESS WITH PEGA CUSTOMER SERVICE FRAMEWORK

Delivering Automation, E-signatures, and Smarter Workflow to Replace
Outdated Manual Processes with a Modern, Member-first System.

About the Customer

A U.S. government retirement system providing retirement, disability, and survivor benefits to its members. The organization has supported thousands of members, retirees, and their families, making them plan confidently for their future.

Engagement Story

The organization struggled with outdated systems and manual practices as digital expectations grew. Members lacked clarity about their retirement options, while manual processes slowed applications and created frustration. The legacy approach couldn't keep pace with the needs of today's members.

Recognizing these critical issues, the client partnered with a Pega implementation partner to automate the system and create a user-friendly experience. With technological expertise and a deep understanding of the client's requirements, EvonSys set out to modernize the retirement application journey. The client aimed to make the process automated, faster, and more transparent while ensuring members felt supported and informed about their application status.

Outdated paper forms, physical signatures, and manual validations delayed the application process and left members in the dark about their status, creating frustration and repeated inquiries.

Key Business Challenges

The client's reliance on legacy systems created significant roadblocks in delivering efficient, member-centric services. These challenges impacted both operational efficiency and overall member experience:



Outdated Legacy System

The existing platform was difficult to navigate and lacked flexibility for simple updates, making everyday tasks unnecessarily cumbersome.



Manual Updates

Staff had to manually complete critical updates, such as personal and banking details, which increased the risk of errors, inconsistencies, and processing delays.



Lack of Status Visibility

Members could not track their application progress, creating uncertainty and frequent inquiries about their case status.



Limited Awareness of Benefits

Most members were unaware of the retirement options they were eligible for, leading to underutilization of the services.

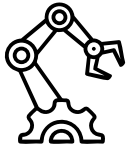


Dependence on Physical Signatures

Mandatory physical signatures slowed down processing, adding extra time and effort for members and staff.

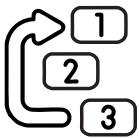
Desired Goals

To address the issues faced by both members and staff, the client set out to implement the following improvements:



Task Automation

To eliminate the need for manual intervention and automate tasks, thereby increasing efficiency and reducing man-hours.



Priority Case Handling

Introduce intelligent case routing to address high-priority tasks, promptly strengthening member trust and confidence.



User-Friendly Experience

Modernize the system with an intuitive interface and well-structured task management to simplify workflows and enhance usability.

Solution

In response to these challenges, EvonSys partnered with the client to design and deliver a suite of comprehensive solutions:

Pega Customer Service Framework

Collaborating with EvonSys, the client integrated the Pega Customer Service framework. This strategic move ensured efficient handling of customer interactions across multiple channels, improving overall user experience.

E-Signature

Transitioning to electronic signatures through DocuSign was a significant leap, making the application process faster, more secure, and environmentally sustainable. Previously, physical signing would extend the agreement process, leading to delays.

Enhanced Communication

Members received timely status updates through email notifications, reducing uncertainty and giving them greater control over their applications.

Seamless API Integrations

External APIs were integrated for personal and banking validations, enabling real-time verification.

Automated Tax & Deduction Processing

IRS-compliant withholding rules were embedded directly into the system, ensuring accurate and automated tax and deduction calculations.

Smarter Workflow Management

A redesigned task management system streamlined daily operations, minimized bottlenecks, and improved overall staff productivity.

Stronger Security Framework

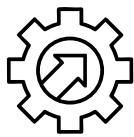
Advanced risk-assessment validations safeguarded member data, strengthening trust while ensuring compliance and security.

Data-Driven Insights

User-friendly, real-time dashboards provided actionable insights, helping to make faster, smarter business decisions.

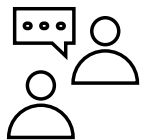
EvonSys transformed the retirement system within six months, ensuring a streamlined workflow and automation.

Key Activities Involved



Re-Architecting Workflows

The retirement process was redesigned from end to end, eliminating unnecessary manual steps.



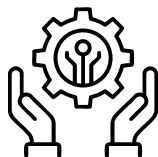
Personalizing Communication

Members could choose how they wanted to receive updates, creating a more inclusive experience for older or less tech-savvy members.



Deploying Get Next Work (GNW)

Introduced an intelligent task distribution system that automatically escalated high-priority cases.



Training and Adoption Support

Staff were guided through the transition, ensuring smooth adoption of the new digital tools without disrupting service.

Business Outcome

Modernizing the retirement application process delivered measurable results for members and staff, reshaping the organization's service delivery model.

EvonSys leveraged the Pega Customer Service Framework and modern digital solutions to automate and streamline the retirement application process.



Faster Processing

Automation and smarter workflows now complete manual, paper-driven tasks that once took hours or days in just minutes.

Improved Accuracy

Automated validations and compliance checks minimized errors, ensuring reliable financial calculations and smoother processing.

Enhanced Transparency

Members gained real-time visibility into their application status and SLAs, reducing uncertainty and building trust in the system.

Higher Member Satisfaction

Seamless e-signatures, proactive communication, and personalized updates created a stress-free, supportive experience for members.

Operational Efficiency

Features like Get Next Work (GNW) optimized task distribution, balanced staff workload, and reduced repetitive inquiries.

Increased Loyalty & Advocacy

The improved experience fostered long-term trust and loyalty, while positive member feedback drove stronger word-of-mouth recommendations.

Client Testimonial

“

I have really enjoyed the ability to submit the retirement application over the phone. There are many members that have difficulty submitting online due to technical or skill level challenges and appreciate the ability to use their phones to finish with a DocuSign. Most members expect the ability to do most of what they need over the phone & appreciate that they are not told to take another step or process to finish something that is already a stressful decision for our members. They are usually very happy to be able to have someone help answer questions about their future retirement while they are filling out the application.

- Randy

★ ★ ★ ★ ★

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“

A lot of members are really happy (especially the older members who have problems being online or don't have a computer) to have the ability to apply over the phone and most members are really happy that we are offering an over the phone ability for them to apply for their retirement.

- Sonja

★ ★ ★ ★ ★

”

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Transform your customer
and member experiences with a
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