



HOW A LEADING NORTH AMERICAN BANK REDUCED SERVICE REQUEST TURNAROUND TIME BY 70% WHILE STRENGTHENING GOVERNANCE

Explore how intelligent orchestration and secure digital workflows reduced costs and eliminated approval errors for a top U.S. bank.

About the Customer

The client is a leading U.S. financial institution with a substantial asset base and a broad national footprint. It supports large-scale retail and commercial banking operations and operates within a highly regulated environment shaped by strict requirements for security, compliance, and resilience.

Engagement Story

For years, the bank handled property management service requests through manual, paper-based forms. The process involved multiple stakeholders, several layers of approval, and repeated verification of user and signer details, along with the collection of supporting documents. What should have been a straightforward request often became a slow-moving administrative exercise.

As volumes grew, the strain on the process became harder to ignore. Requests were difficult to track, approvals were delayed, and manual checks increased the risk of errors and rework. Without a centralized digital system to validate signers and apply authorization rules consistently, both customers and internal teams were left navigating an inefficient and fragmented workflow.

The bank recognized that the process itself had become the bottleneck. To modernize it, the institution partnered with EvonSys to replace paper-based handling with an integrated, trackable workflow that could support multiple documents, layered approvals, and accurate user verification in a single digital system.

Disconnected processes and manual document handling created operational friction, where tracking gaps and inconsistent validations slowed down request completion.

Key Business Challenges

As service volumes grew, structural gaps within the paper-based process began to surface, creating measurable operational and customer impact.

Manual, Paper-Driven Workflows

Service requests for property management clients were processed through paper forms, creating dependency on physical documents and manual handoffs. This limited speed, visibility, and scalability across the request lifecycle.

Complex Multi-Level Approvals

Each request required coordination among Requestors, Authorized Users, Master Signers, and Relationship Managers. Managing layered approvals without a centralized system made tracking difficult and increased turnaround times.

Limited Visibility and Control

Without a unified digital platform, there was no real-time tracking of request status, signer validation, or authorization checks. This lack of transparency led to delays, follow-ups, and operational inefficiencies.

High Risk of Errors and Rework

Manual data entry, document handling, and authorization verification increased the likelihood of errors. Incorrect information, missing signatures, or incomplete documentation resulted in rework and customer dissatisfaction.

Manual handoffs, layered approvals, and the absence of real-time tracking created delays, rework, and inefficiencies across the process.

Desired Goals

To modernize service operations and strengthen governance at scale, the bank defined clear, outcome-driven objectives for its digital transformation initiative.



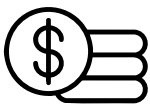
Faster Turnaround

Accelerate approval and signing cycles through automated routing, notifications, and digital workflows to significantly reduce service request completion time.



Error Reduction & Control

Minimize data entry errors, prevent unauthorized signoffs, and enforce structured approval sequencing with secure verification and validation checks.



Cost Optimization

Lower reliance on paper, printing, and courier services while reducing manual effort to improve operational efficiency and cost savings.



Stronger Compliance

Ensure digitally certified documentation, centralized storage, and complete audit trails to improve regulatory readiness and reduce audit preparation time.



Higher Processing Capacity

Enable teams to handle increased service request volumes within existing operational capacity by eliminating rework and inefficiencies.

Automated routing and real-time notifications shortened approval and signing cycles, enabling faster service request completion.

Solution

To modernize and scale the service request lifecycle, EvonSys delivered a secure, digitally orchestrated solution built on Pega and DocuSign.

End-to-End Digital Orchestration

EvonSys implemented a structured, Pega-based service request workflow integrated with Composite DocuSign templates, replacing paper-driven processing with a centralized, guided digital experience.

Automated Multi-Level Approvals

Enabled enforced, sequential signing across Authorized Users, Master Signers, and Relationship Managers, ensuring accurate routing, controlled approvals, and elimination of manual follow-ups.

Secure Digital Signing & Notifications

Leveraged DocuSign for enterprise-grade electronic signatures, mobile OTP verification, automated notifications, and compliant audit trails to accelerate turnaround while strengthening security.

Centralized Case Management & Audit Readiness

Utilized Pega's case orchestration capabilities to provide end-to-end tracking, centralized document storage, and automatic attachment of completion certificates, ensuring full traceability and regulatory compliance.

Configuration-Driven Architecture

Engineered a flexible, configuration-driven framework that supports complex DocuSign formats beyond native platform limitations. New document types, service cases, and approval flows can be introduced through simple configuration updates without modifying core code.

Scalable & Future-Ready Design

Designed a flexible, cost-effective foundation that supports evolving business needs while enabling higher processing volumes without increasing operational overhead.

Built on Pega and strengthened through deep DocuSign integration, the solution enables secure digital signing, mobile OTP verification, multi-level approvals, and audit-ready traceability within a scalable, future-ready architecture.

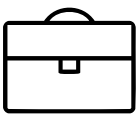
Technical Overview

The solution architecture was designed with clear separation of orchestration, execution, and compliance layers to ensure scalability, security, and operational control.



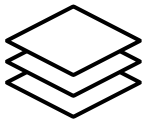
User Interaction Layers

- External users complete approvals and signatures through secure DocuSign signing interfaces.
- Internal users initiate and monitor service request cases within Pega.



Case Management & Orchestration (Pega)

- Pega manages the complete Service Request case lifecycle and overall status tracking.
- Prepares, validates, and orchestrates all request data before triggering DocuSign.
- Stores envelope ID, workflow ID, signer status, and completion status within the case.



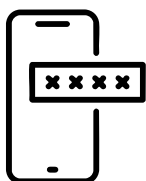
Composite Envelope Construction

- Pega dynamically constructs DocuSign composite envelopes including:
 - Multiple documents
 - Template IDs
 - Recipient roles and routing order
 - Workflow and reference identifiers for tracking
- Envelope definitions are transmitted to DocuSign via REST APIs.



Signing & Approval Management (DocuSign)

- Approval sequencing and routing logic are defined within DocuSign templates.
- Supports sequential and parallel multi-level approvals.
- DocuSign manages the complete signing lifecycle while Pega waits for completion.



Secure Verification & Notifications

- Mobile number-based OTP authentication ensures signer validation.
- DocuSign sends automated email and SMS notifications, signing links, reminders, and completion alerts.
- Pega receives real-time status updates via polling or DocuSign Connect callbacks.



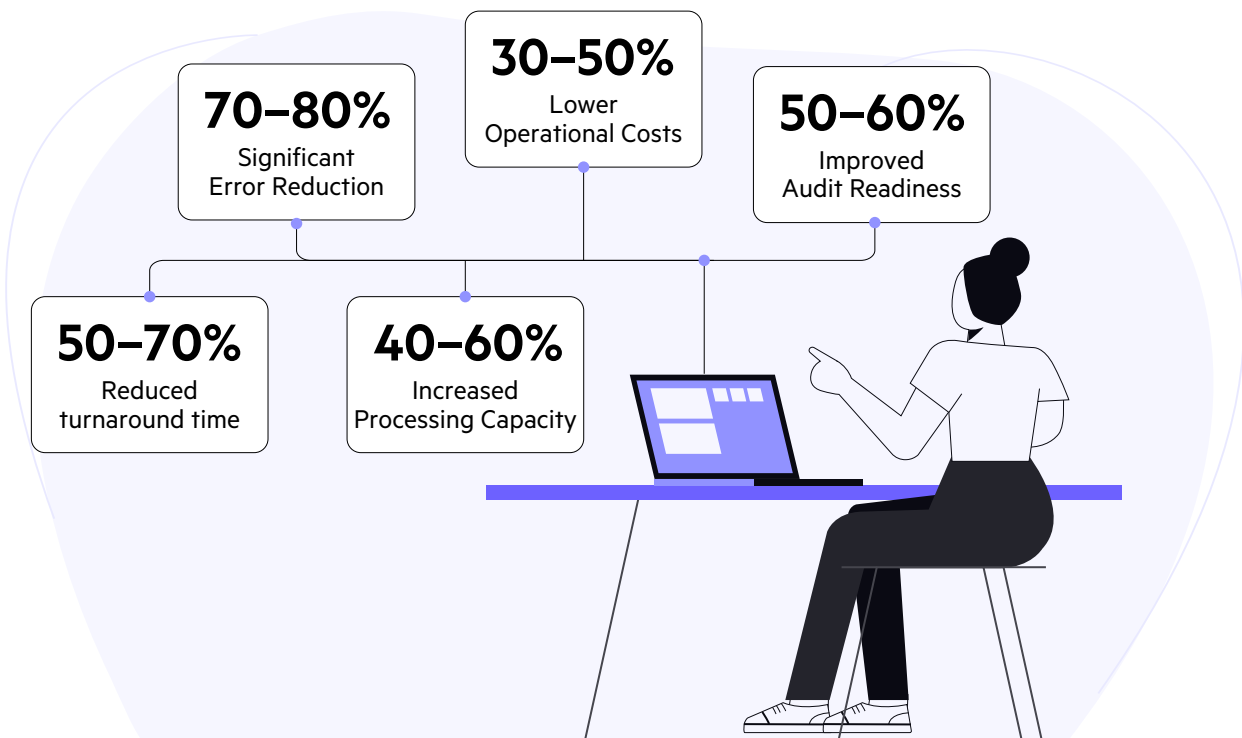
Digital Certification & Auditability

- All documents are digitally signed and certified by DocuSign.
- Completion certificates are automatically generated upon envelope completion.
- Final signed documents and certificates are archived within the Pega case.
- DocuSign provides legally compliant audit logs, while Pega maintains process-level audit tracking.

The architecture eliminates code-level dependency for approval flows, enabling controlled scalability while maintaining enterprise-grade security and audit readiness.

Business Outcome

Delivered within just four months, the digital transformation generated measurable improvements across speed, accuracy, cost efficiency, compliance, and operational capacity.



Accelerated Turnaround Time

Reduced overall service request turnaround time by 50–70%, with approval and signing cycles shortened from several days to less than one day through automated workflows and notifications.

Significant Error Reduction

Decreased manual data entry and processing errors by 70–80%, while nearly eliminating signature and authorization errors through OTP-based verification and enforced approval sequencing.

Lower Operational Costs

Reduced operational costs by 30–50% by eliminating paper, printing, courier services, and manual effort. Paper usage alone declined by nearly 90%.

Improved Audit Readiness

Achieved 100% digitally certified documentation with completion certificates centrally stored in Pega, reducing audit preparation and document retrieval time by 50–60%.

Increased Processing Capacity

Enabled teams to handle 40–60% more service requests within the same operational capacity, improving overall efficiency without increasing overhead.

The transformation delivered measurable gains in speed, accuracy, cost efficiency, and compliance, while enhancing user experience and expanding operational capacity within existing teams.

Simplify complex processes with EvonSys

Talk to our experts



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