



HOW A PEGA-POWERED SOLUTION HELPED AN INVESTMENT FIRM ACHIEVE UNIFIED ACCESS TO PORTFOLIO DATA

Discover how a leading investment and advisory firm transitioned from legacy systems to a modern, Pega-powered platform for managing employee equity and portfolio data.

About the Customer

The customer is an independent investment management and advisory firm that provides financial planning and wealth management services to individuals, families, and institutions. The firm focuses on delivering long-term, research-driven investment strategies and a highly personalized client experience.

Engagement Story

A unique aspect of the organization is its employee-ownership model where nearly 70% of the business is held by its employees. With employees holding the majority stake, the firm needed reliable, real-time access to portfolio data to maintain transparency and support day-to-day decisions.

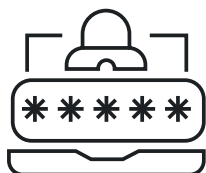
The firm's existing legacy system struggled to meet that need. It was slow, prone to data inconsistencies, and unable to keep up with the firm's growing operational demands. Day-to-day portfolio management became cumbersome, limiting efficiency and frustrating employee-owners who expected the same agility in internal tools that they delivered to clients.

To stay aligned with those expectations, the firm decided to replace its aging platform with a modern, integrated system that could deliver faster, more accurate access to equity and investment data. The initiative marked a strategic investment in the firm's future strengthening internal systems, improving transparency, and reinforcing its culture of ownership and accountability.

The existing legacy system posed major operational hurdles like, limited admin access, slow data imports, and outdated technology made processes inefficient and error-prone.

Key Business Challenges

To retire its legacy system and transition to a more modern, dynamic platform, the advisory firm needed to overcome several operational and technological hurdles that limited efficiency and scalability.



Limited Administrative Access

Administrators lacked visibility into other users' data, making it difficult to verify accuracy and maintain consistency across records.



Complex Data Import Process

The data import mechanism was slow and cumbersome, causing delays in updates and increasing the risk of inconsistencies.

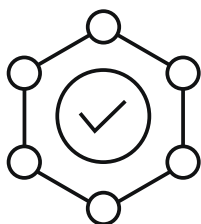


Keeping Pace with Technology

The outdated system could not support modern capabilities, driving the need for a more agile, technology-driven platform.

Desired Goals

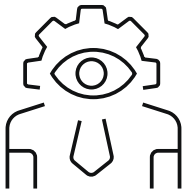
The global organization aimed to build a modern internal platform that simplified access, accuracy, and management of colleague equity information.



Unified Access

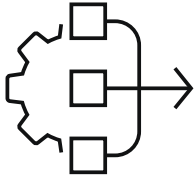
Allow staff to easily view and manage equity, options, and loan details through a secure, user-friendly interface.

The client aimed to modernize its internal systems by creating a unified platform that centralized equity data, improved administrative oversight, and simplified data management with annual election features.



Administrative Oversight

Provide administrators with tools such as impersonation access to review user data, ensuring accuracy and alignment with the latest records.

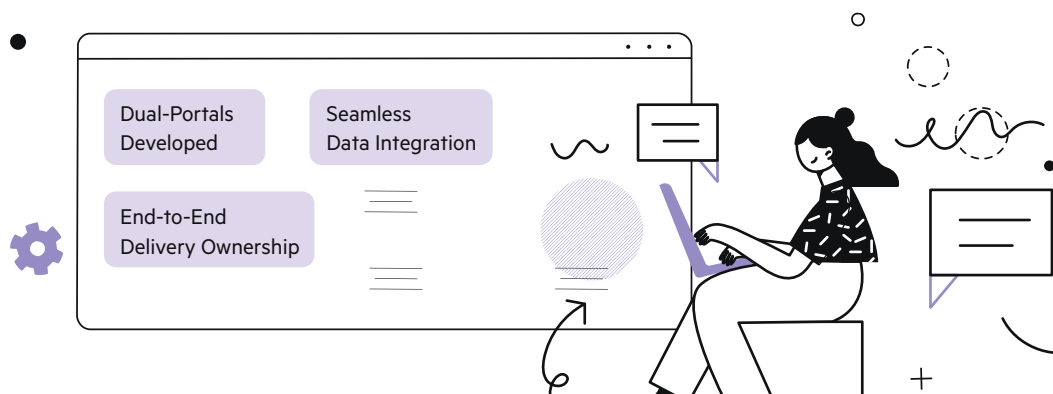


Simplified Management

Simplify the data import process and support an annual election platform for colleague equity holders, reducing manual effort and improving transparency.

Solution

EvonSys led the development of a modern, Pega-powered platform to replace the client's legacy system and enhance access to colleague equity information.



Dual-Portals Developed

EvonSys built two integrated portals, CEP and CCEP, on Pega 8.2, enabling efficient access and management of employee equity data.

Seamless Data Integration

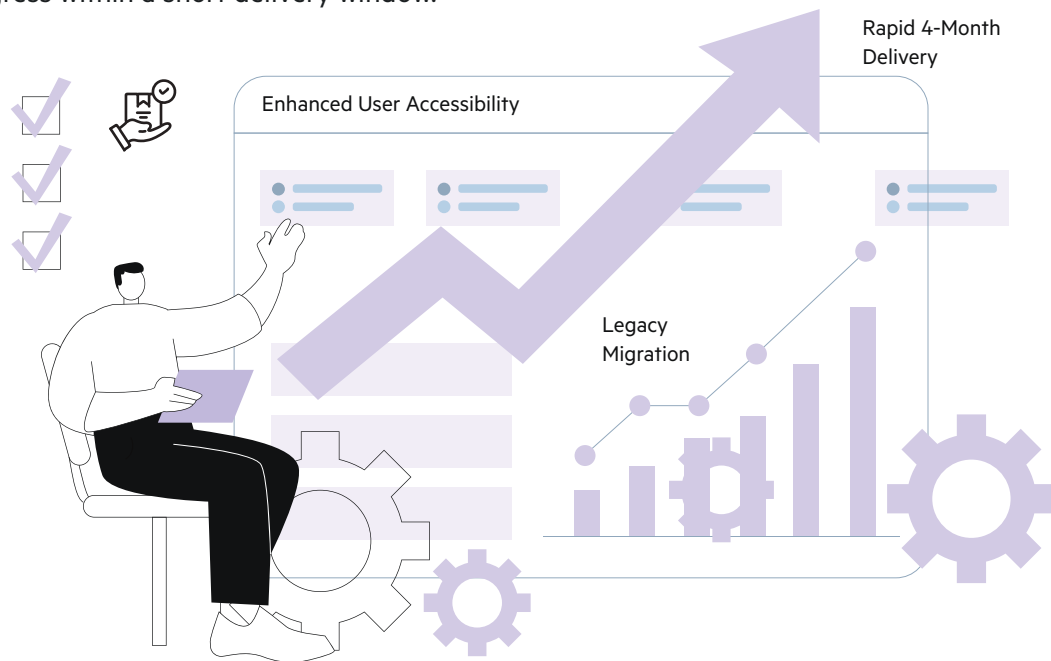
The solution was integrated with the Snowflake database for real-time data retrieval and improved accuracy across systems.

End-to-End Delivery Ownership

Managed the complete project lifecycle, from requirement analysis and coordination with business teams to deployment, production integration, and ongoing support.

Business Outcomes

The project focused on improving internal accessibility and system performance, achieving measurable progress within a short delivery window.



Rapid 4-Month Delivery

EvonSys completed the project in just four months, meeting an aggressive schedule without compromising quality or functionality.

Legacy Migration

The outdated platform was fully decommissioned, with all data and operations successfully migrated to a modern Pega-powered system.

Enhanced User Accessibility

The new platform provides employees with a seamless, unified experience for viewing and importing their holdings data efficiently.

The initiative achieved a rapid four-month transition to a Pega-powered platform, replacing the legacy system and improving access to employee equity and portfolio data.

Are you looking to modernize your systems?

Contact us today



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