



HOW A GLOBAL BANK TACKLED HIGH-VOLUME EMAIL PROCESSING WITH LOW-CODE AUTOMATION

Discover how a multinational financial institution boosts productivity and response speed through automated email handling and secure authentication.

About the Customer

The client is a Fortune 500 global bank recognized for its scale, innovation, and reach across major markets. It provides retail, corporate, and institutional banking services to clients in over 90 countries and continues to modernize its systems and operations to deliver faster, more secure, and customer-centric financial solutions.

Engagement Story

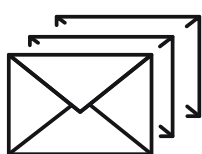
The bank's customer service team, responsible for managing high volumes of client email requests, faced an unexpected challenge. A sudden rise in incoming emails tested the limits of their operations. Employees spent hours sorting through emails, authentication checks slowed responses, and customer satisfaction began to slip.

The surge exposed a deeper issue: operational gaps like manual processes that couldn't scale and an authentication framework needing reinforcement. Determined to restore speed without compromising security, the institution looked for an automation-led solution that could handle high volumes reliably.

The bank partnered with EvonSys to design an automated system to manage high email volumes efficiently. The new solution replaced manual inbox handling with an intelligent, rule-based workflow that reduced turnaround time and improved accountability.

Key Business Challenges

Managing erratic fluctuations in the volume of incoming emails with the existing workforce became increasingly complex for an organization of this scale.



Email Volume Management

The existing manual process could not keep pace with unpredictable spikes, leading to delayed responses, reduced productivity, and inconsistent customer experiences.

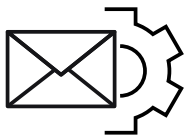


Authentication Integration

The lack of seamless connectivity with the bank's existing authentication systems (Vanguard and Grace) created verification delays and weakened the overall process.

Desired Goals

The bank aimed to establish an automated email management system that could ensure timely, accurate, and secure responses to client queries.



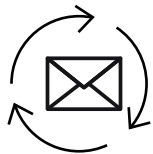
Automate email routing

to create interactions automatically upon receiving client emails.



Enable user authentication

through email using the Grace call mechanism.



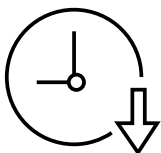
Auto-route email interactions

to the right teams using NLP-based content extraction.



Automate client notifications

for updates and responses directly from the system.



Reduce interaction time

through end-to-end email automation and workflow efficiency.

The customer wanted to create a strong email automation system to handle growing volumes easily. The solution was designed to make routing, authentication, and notifications faster, more accurate, and more secure.

Solution

The EvonSys team implemented a series of targeted activities leveraging low-code capabilities within the Pega environment.

Automated e-mail interactions

by replicating the end-to-end flow previously handled through manual Outlook processing.

Used Pega e-mail channels and listeners

to convert incoming emails into interaction cases automatically.

Enabled intelligent routing

through an NLP model that categorized and directed emails to the right teams.

Leveraged Pega OOTB features

such as SLAs and agents to automate client notifications and improve turnaround times.

Integrated authentication systems

by utilizing service rules to connect external platforms (Grace and Vanguard) for secure client verification.

The new system equipped customer service representatives with a unified interface to access all customer and stakeholder information without switching between screens.

Business Outcomes

The newly developed email interface system delivered measurable operational and customer experience gains.

Employee productivity surged

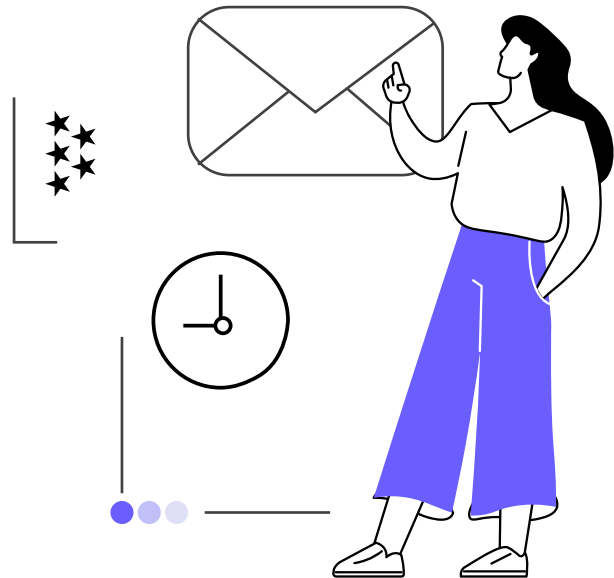
through process automation.

Reduced turnaround time

for handling email requests.

Enhanced customer experience

with automated, timely client notifications.



The Pega-powered email channel automated response handling and notifications, streamlining communication between customers and service teams.

Client Testimonial

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The EvonSys development team delivered the project in an incredibly brief period, thanks to their advanced logical coding process, which is a part of their approach. They used sprints to help organize their work and keep them on track.

★ ★ ★ ★ ★

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Are you looking to modernize your systems?

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