



STRATEGIC PEGA UPGRADE OF A CRITICAL BANKING APPLICATION

Minimizing Risk And Maximizing Productivity Through Backward
Compatibility And Phased Implementation

About the Customer

The client is a globally recognized banking and financial services organization headquartered in New York. With over 200 years of banking heritage, it operates more than 2,500 branches worldwide, offering comprehensive financial services to diverse customer segments.

Engagement Story

The bank faced a critical upgrade challenge for a core banking application transitioning from Pega 6 to Pega 7. The application managed over 35,000 rules developed over three decades and supported hundreds of thousands of daily transactions across multiple international operations. Given past upgrade complexities, the bank sought a strategic, risk-managed approach to minimize operational disruptions.

Key Business Challenges



Operational Risk and Complexity

Previous upgrades had deliberately avoided extensive changes to the user interface and core functionalities, increasing complexity and risk for the current transition. The application's daily transaction volume further magnified potential risks.

Functional Interdependencies

Highly interconnected functionalities posed significant challenges; minor changes could trigger wide-ranging operational disruptions.

Minimizing Downtime

Potential downtime threatened to damage the bank's operational efficiency and market reputation, making near-zero downtime critical.

The client's critical banking application faced significant risk due to its complexity, with over 35,000 rules and decades of operational history.

Desired Goals

- Ensure a seamless upgrade with backward compatibility
- Reduce operational risks significantly
- Achieve near-zero downtime during the upgrade
- Maintain global operational continuity throughout the process

Solution

EvonSys introduced a pioneering backward compatibility solution. This groundbreaking approach enabled simultaneous operation of both Pega 6 and Pega 7 using a unified database, significantly reducing operational risk and downtime.

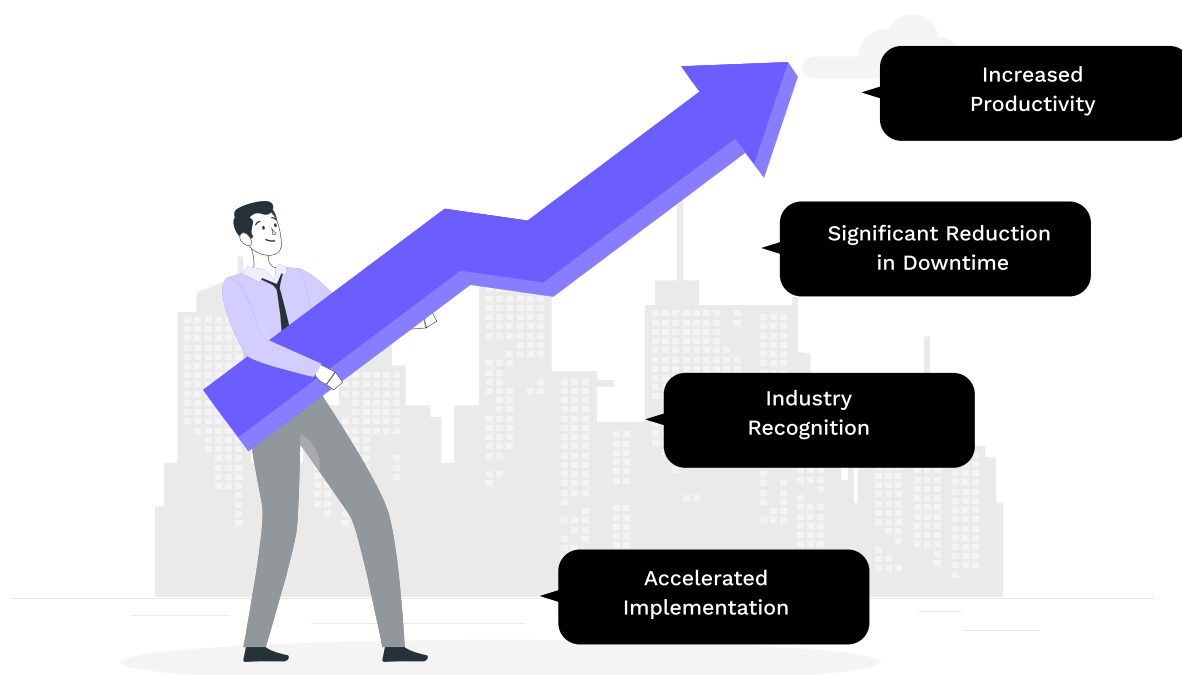
Further, EvonSys upgraded Smart Investigate functionalities, automating rule-driven processes, payment investigations, and correspondence management, dramatically enhancing efficiency and accuracy. The transition was strategically executed through a phased global rollout, minimizing disruption.

EvonSys implemented a phased backward compatibility strategy, enabling simultaneous operations on both Pega versions, significantly reducing operational risks.

Key Activities Involved

- Strategic planning of phased upgrades
- Comprehensive analysis of functional dependencies to mitigate ripple effects
- Global coordination ensuring smooth operational scaling

Business Outcomes



Increased Productivity

The bank experienced up to a 30% improvement in productivity across critical departments post-upgrade.

Significant Reduction in Downtime

EvonSys' innovative backward compatibility solution virtually eliminated downtime, safeguarding the bank's continuous operations and market reputation.

Industry Recognition

The unique solution devised by EvonSys was recognized and documented by Pega Systems as a best practice for managing complex application upgrades, providing future guidance for similar scenarios.

Accelerated Implementation

Completed within an aggressive 9-month timeline, the timely execution maintained the bank's competitive advantage.

The solution resulted in a 20–30% increase in productivity and virtually eliminated downtime, earning recognition from Pega as a documented best practice.

Client Testimonial

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“Our application upgrade was long overdue. We had reached a point where delaying the upgrade was no longer an option. We needed an approach that could eliminate possible risks and vulnerabilities and minimize downtime. EvonSys proposed a ground-breaking strategy that eliminated most risks and virtually brought the downtime to zero. It was a great experience working with the team, and we look forward to collaborating again in the future.”

— VP, Trade and Treasury Services

Get a Pega Upgrade Consultation

Free, no strings attached!

Schedule Your Complimentary Pega Upgrade Consultation Today.!

Discover how EvonSys can streamline your critical Pega upgrades, minimize downtime, and enhance operational efficiency. Our experts are ready to evaluate your system and propose a tailored strategy at no cost.



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