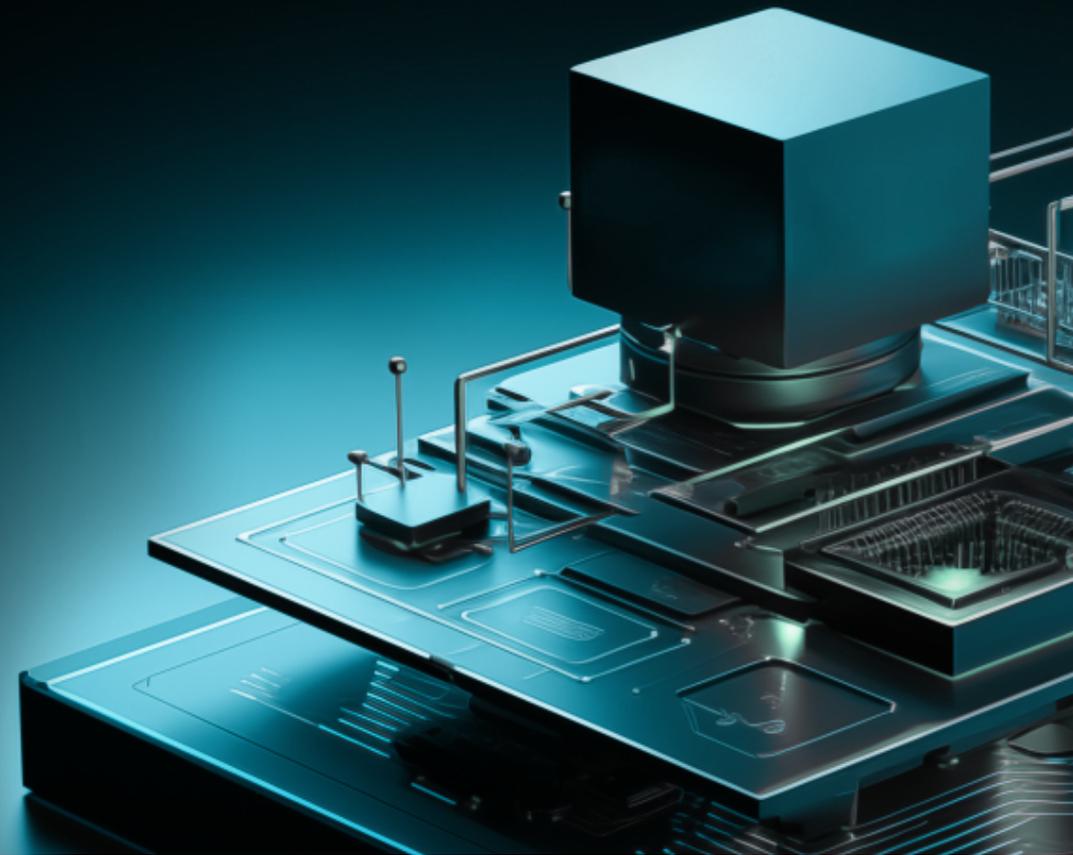


Case Study

PEGA ASSESSMENT: A MODERNIZATION SUCCESS STORY

softserve



THE CHALLENGE

Our client, a financial services company, needed to modernize their systems. Their goals included customizing their user experiences with Pega, streamlining operations, and improving speed and efficiency, all while maintaining strict privacy and security standards.

However, their current applications were built on the soon-to-be-unsupported Pega 7.4 and needed an upgrade. The challenge was significant, considering the outdated elements found in their system, and the advancements introduced in the nine major releases since Pega 7.4. We ran a comprehensive four-week assessment of their applications.

THE ASSESSMENT

TASK	DETAILS	RELEVANCE
APPLICATIONS REVIEW 	Checked all applications and frameworks, such as CRCC, CTFS, CTRF, and new account processes. Used special tools to generate reports for application modernization, cloud migration, and version refresh.	Identifies areas to improve, modernize, and optimize the applications, resulting in better performance and a smoother user experience.
ARCHITECTURAL DIAGRAMS 	Reviewed important architecture diagrams to fully understand their system. Vital for effective decision-making, troubleshooting, and planning future developments.	Ensures that any changes align with the overall architecture, cutting down on risks and boosting efficiency.
DATABASE AND INFRASTRUCTURE INSPECTION 	Reviewed the database infrastructure and architecture. Found 12 different integration points and around 280 methods in total. This review finds potential bottlenecks, vulnerabilities, or areas for optimization.	Ensures that the database setup is efficient enough to support the applications and integrations, which means better performance and reliability.

INTEGRATION REVIEW



Reviewed the integrations to understand connectivity, complexity, and the security requirements.

Ensures seamless communication and data flow between components. Any potential problems, security risks, or optimization opportunities can be addressed, keeping the system running smoothly.

GUARDRAILS COMPLIANCE CHECK



Reviewed the compliance score and all warnings, focusing on the severe guardrail estimates.

Ensures that Pega applications follow best practices, security standards, and regulatory requirements. It's key for supporting the integrity and security of the system, protecting sensitive data, and avoiding legal or regulatory consequences.

FINDINGS

The assessment shed light on several outdated elements:

1 OUTDATED RULES

The company's system had outdated rules and practices, focused on about 860 rules that needed updates. This included Rules Overrides, ActiveX components, missing Access Roles, and Custom Objects.

2 GUARDRAILS AND PATTERNS

Certain established guardrails and patterns had grown obsolete, leading them to rely on frameworks that are now considered “anti-patterns.”

3 PEGA CHAT AND PEGA CALL

The applications required re-implementation because of major updates since version 7.4. (Your framework may differ depending on the industry applications your Pega applications may use.)

4 WEB DEPLOYMENTS

From Pega 8.8 onward, only containerized deployments were supported. They needed to establish in-house cloud infrastructure or migrate to Pega Cloud.

5 SMART DISPUTE

The framework went through significant changes, including performance upgrades, and fixing more than 180 issues in the last three releases. (Your framework may differ depending on the industry applications your Pega applications may use.)

NEXT STEPS IN THE MODERNIZATION JOURNEY

ASSESS

Complete assessment of existing Pega applications:

1. App stacks
2. Integrations
3. Database and infrastructure
4. Technical debt
5. Existing pain points

UPDATE

IMPLEMENT

Improve application stability, integrity, security, and performance:

1. Migrate applications to Pega Cloud, updating to the latest version.
2. Fix what is needed to ensure the applications operate on the cloud and Infinity '23
3. Remediate items uncovered during the assessment.
4. Validate applications on Pega Cloud.
5. Migrate Pega-related data for staging (as required) and production.

EVOLVE

Fully modernize the applications, take advantage of new features, and work on existing backlog:

1. Complete modernization of all applications. This will most likely occur after going live to production.
2. Address all pending gaps preventing the application from reaching a modern state and effectively leverage the latest features.
3. Develop a multi-year product roadmap, with feature list and business case (ROI) analysis, driven by user input.

EVALUATION

DELIVERY

The assessment showed the need for modernization and offered a clear path to a smooth, efficient, and secure Pega environment. This is important for driving business growth and improving user experiences.

About SoftServe

SoftServe is a premier IT consulting and digital services provider. We expand the horizon of new technologies to solve today's complex business challenges and achieve meaningful outcomes for our clients. Our boundless curiosity drives us to explore and reimagine the art of the possible. Clients confidently rely on SoftServe to architect and execute mature and innovative capabilities, such as digital engineering, data and analytics, cloud, and AI/ML.

Our global reputation is gained from more than 30 years of experience delivering superior digital solutions at exceptional speed by top-tier engineering talent to enterprise industries, including high tech, financial services, healthcare, life sciences, retail, energy, and manufacturing.

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