



PegaWorld

JUNE 7-9 | LAS VEGAS

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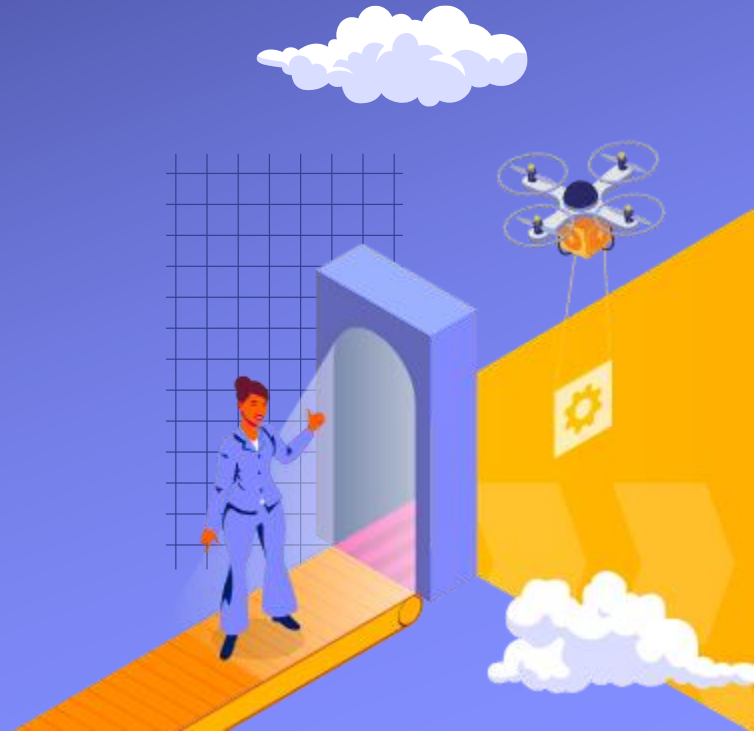
Edward Jones

EY

Shape the future
with confidence

All eyes on ops: Edward Jones creates harmony with Pega Process Fabric™

June 2026



Meet the team



Rodney Kinzinger

General Partner,
Operations, Edward Jones



Marta Tlalka

Department Leader,
Automation Platforms
and CoE, Edward Jones



Rob Fienup

Product Owner, Ops
Portal, Edward Jones



Mark Dobbie

Senior Manager, EY

The challenges faced

OPS ASSOCIATE



“ Have to go to each system. Each may have multiple queues

No single, trusted view

PROCESS LEAD



“ We should know something is wrong before someone calls us.

Fragmented work execution

CAPABILITY LEAD



“ We don't have any real-time view. It's 12 in the afternoon—are we ahead or behind? We don't know.

Escalations lack visibility

OPS PORTAL

Single pane of glass operations desktop to see your priorities, seamlessly execute tasks, and review KPIs & KRIs

CLIENT
ONBOARDING

ASSET MOVEMENT

CLIENT
REPORTING

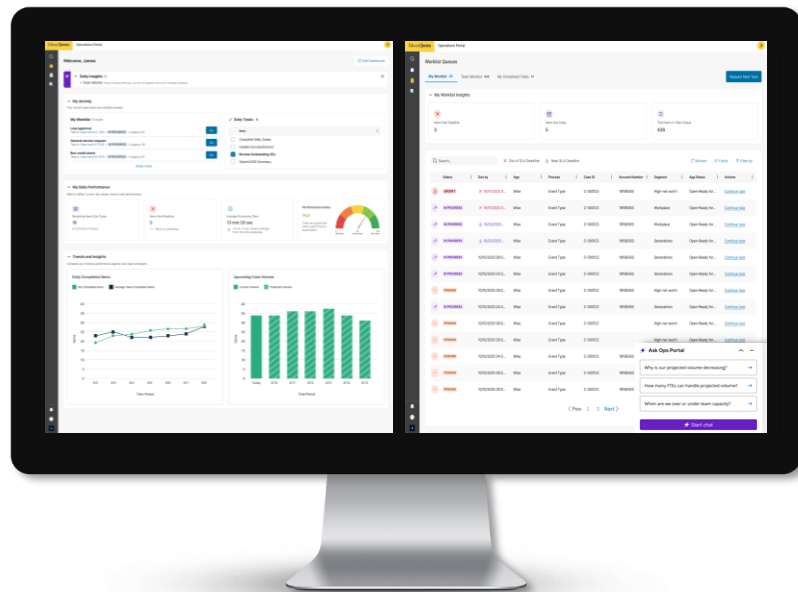
TRADING

CUSTODY

FINOPS, RISK &
PERFORMANCE

PERSONALIZED
DASHBOARDS

TASK
OPTIMIZER



REPORTING &
ANALYTICS

AGENTIC
ENABLEMENT

The Journey to scale

Proof of Concept

Pilot

General Availability



Experience Design

UCase and Integration

Beyond



What we did: Approach and delivery



Partner with Pega's process fabric product & lighthouse teams



Inventory and align work across all sources



Drive cross-functional buy-in

Accelerating value: Core technologies to leverage

**FRAGMENTED
WORK
TRACKING**



**Universal Case
Framework**

Centralizes cases to improve visibility, ownership, and execution speed

**CROSS-
PRODUCT
DEPENDENCIES**



**Universal Event
Intake**

Standardizes and centralizes events for faster, reliable processing

**SILOED
OPERATIONAL
DATA**



**Data &
Reporting
Architecture**

Unifies data sources to deliver real-time, actionable insights

Impact and the road ahead

Client Experience

- Faster Turnaround Times
- Segmented Prioritization

Branch Experience

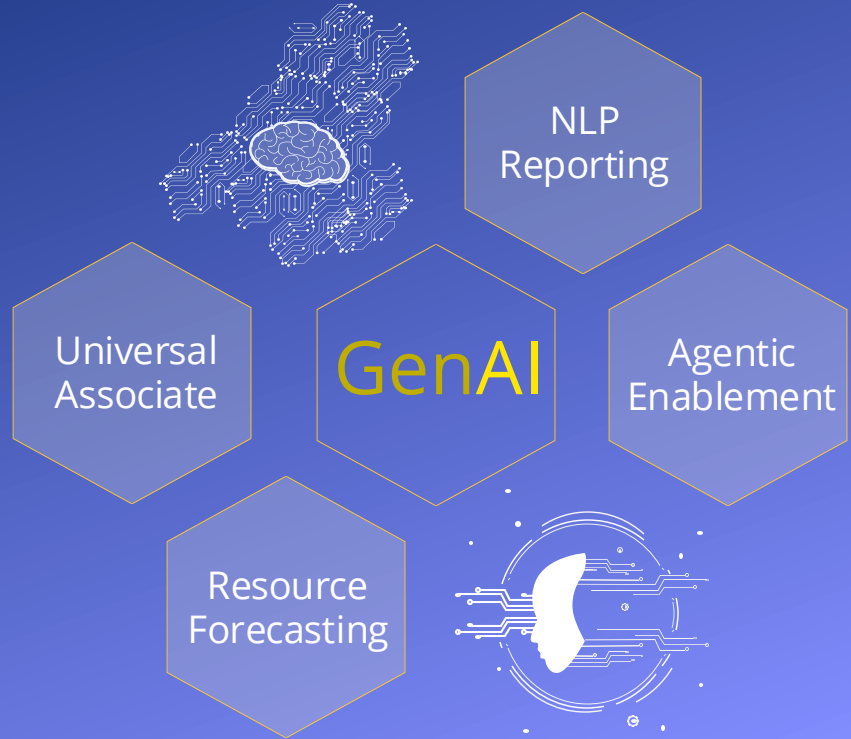
- End-to-End Work Visibility
- Escalation Management

Risk Mitigation

- KRI Alerts & Notifications
- Auditability

Operational Excellence

- Actionable KPIs & bottleneck identification
- Resource deployment & forecasting



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