



PegaWorld

JUNE 7-9 | LAS VEGAS

[PEGAWORLD.COM](https://pegaworld.com)

From Friction to Fans

Our Enterprise Pega Transformation

June 9, 2026



Agenda

- Allied Solutions Introduction
- Through the Ups & Downs...
- ...To the Center of Excellence
- Roundtable Conversation with additional Allied Teammates



Jason Harper
Manager of Business
Platforms



Chris Woods
Director of Software
Engineering



Experience working with
financial institutions since

1978 

2200 

employees located
across the country

170+  products

130+  providers

 **Headquartered in
Carmel, IN**

Five other office locations in

- Boca Raton, FL
- Dakota Dunes, SD
- Plano, TX
- South Bend, IN
- St. Paul, MN



**Independently operated
subsidiary of Securian
Financial since 2004**

One of the largest providers of
insurance, lending, marketing, risk
management products,
and data-driven solutions to North
American Financial Institutions.



More than **6,000 clients** in the
Credit Union, Bank, Finance
Company, Mortgage Servicer,
and Auto Dealer markets



Nearly **\$1.9B** in premium
under management and
\$505M in annual revenue



24M auto and mortgage
loans tracked via proprietary
tracking system

Through the Ups & Downs...

2021

- Pega initially brought promise of unified platforms across our critical business operations, supporting customer-facing Contact Center and backend Escrow processes.

Q3 2025

- Within one quarter of implementing the new approach, our team moved from identifying work to **delivering meaningful value at three times the previous annual output while saving \$1.2M.**

Q1 2025

- The model fell into unsustainability, contractor reliant, siloed development and our internal team's reputation was at low point.
- Our business stakeholders saw Pega as an obstacle, not partner.

Q2 2025

- A significant leadership transition became the catalyst to pivot us from reactive service delivery to structured platform ownership model.

...To the Center of Excellence

Q3 2025

- Could the new model hold under real delivery pressure?
- The team delivered strong results while supporting major initiatives across Contact Center, RefundPlus® DDM, Global CDE and ARM™.
- Q3 exposed scaling risks such as dependency blockers, intake challenges and the need for stronger architecture support.

Q4 2025

- The perception had shifted and the Peganeers were viewed as experts and a go-to team for platform solutions.
- Demand grew faster than intake could handle, making the next challenge about scaling responsibly.

Q1 2026

- With zero contractor dependency, the **internal engineers own the outcomes** and predictable delivery cadence to support long-term planning.
- Business partners seek early collaboration, and the team has proved itself to be a trusted **Pega Center of Excellence**.

The Transformation Journey



Vision

- Defined where the team was going and what the Peganeers were becoming
- Not a ticket-taking Pega support team, but Allied's trusted Pega Center of Excellence



Focus

- Shifted the team from scattered, reactive work to prioritized, measurable delivery
- Made work visible through Jira, ceremonies, backlog discipline and capacity conversations



Clarity

- Implemented shared understanding with roles, expectations, intake, delivery commitments and what “good” looked like
- Allows the team to move with confidence instead of ambiguity



Shared Ownership

- Moved accountability away from contractors and isolated individuals into the team
- Created a culture where engineers owned outcomes, supported each other and understood the business impact of the work



Courage

- Made the hard calls including phasing out contractor dependency, restructuring roles, exposing gaps, challenging old perceptions and betting on internal talent before the model was fully proven

Roundtable Conversation



Jason Harper
Manager of Business
Platforms



Chris Woods
Director of Software
Engineering



Deborah Mardis
Director of Real Estate
& Escrow Payment



Julie Fischer
Director of Risk
Management Service Center

Thank you for your time!



Want to continue the conversation or learn more?
Email **Jason** using the QR code.



For general inquiries, scan here and our team will be in touch.



Visit Our Website
www.alliedsolutions.net



Visit Allied on LinkedIn
Allied Solutions LLC



PegaWorld

JUNE 7-9 | LAS VEGAS

[PEGAWORLD.COM](https://pegaworld.com)