



PegaWorld

JUNE 7-9 | LAS VEGAS

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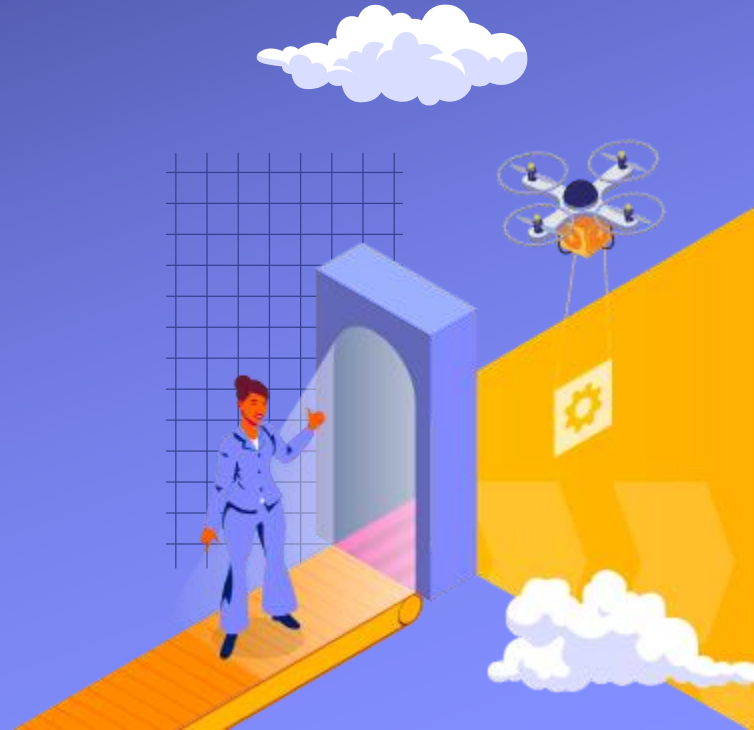
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Transformation Transformed

How Blueprint Drives Speed and Simplicity

NFCU collaboration with Capgemini & Pega.



Presenters



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Explore Navy Federal Credit Union:

Where Excellence Aligns with Community Commitment



Navy Federal Credit Union (NFCU), founded in 1933, is the world's largest member-owned, not-for-profit credit union, focused on serving the military community. It supports more than 15 million members globally, including Active-Duty service members, Veterans, DoD civilians, contractors, and their families, providing financial services designed for key military life events.



The Legal Operations team, within the Legal Department, manages garnishment orders and subpoenas with precision and confidentiality, ensuring compliance with regulatory requirements and supporting risk management by efficiently processing legal requests. NFCU handles around 180,000 legal attachments each year, delivering timely responses to federal, state, and local agencies, as well as private organizations.



The Enterprise Technology Solutions group oversees the technical infrastructure, transformation platforms, and automation tools that enhance member services. ETS collaborates with all departments to improve applications and support the needs of members and their families.

Obstacles:

The Importance of Adaptation, Growth, and Transformation



Disparate Systems

Legacy Lotus Notes applications + IBM BPM systems



Manual Operations

Paper-based document handling (physical folders/drawers)
No automation for routing, approvals, or case tracking



Limited Visibility

No reporting or workload forecasting capabilities



Business Impact

High manual effort
Inefficient case handling
Limited scalability for growing legal demands

The Solution

Business Outcomes

Less Manual Effort · Faster Turnaround · Compliance

Pega Capabilities

STP

SLA Engine

Auto-Routing

OCR + Power BI

Unified Pega Platform



Legacy 1

Legacy 2

Legacy 3

Enterprise Pega Governance as an Accelerator

DRIVING EFFICIENCY AND SPEED THROUGH STRATEGIC PARTNERSHIP AND COLLABORATION



END-TO-END ENGAGEMENT & ARCHITECTURAL GOVERNANCE

- **Full Lifecycle:** Continuous support and partnership.
- **Guidance:** Proactive design & consistency.
- **Enforcement:** Rigorous design & code reviews.



REUSABLE ASSETS & INTEGRATION FOUNDATION

- **Components:** Governable, reusable, functional elements.
- **Rich library:** Ready-to-use connectors & patterns.
- **Integration:** Seamless modern connectivity (On-prem & Cloud).



ENTERPRISE CLASS STRUCTURE & DATA MODEL

- **Structure (ECS):** Governed, scalable control.
- **Data Model:** Spans all business domains.
- **CoE Visibility:** Centralized enterprise asset governance.

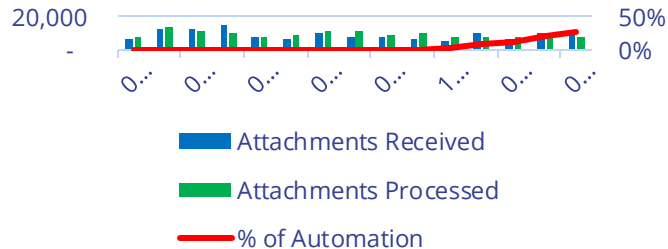
The Results: Automated Processes & Smart Case Handling

Accelerating Delivery Through Pre-Built Assets

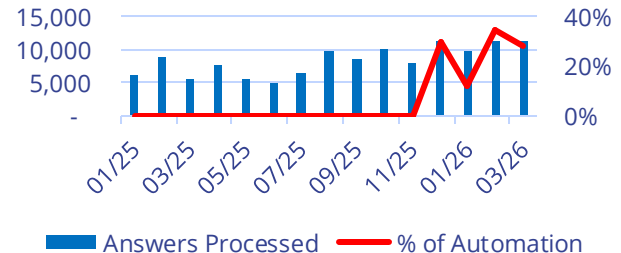


Driving Efficiency Through Straight-Through Processing

LDM - Attachments



LDM - Answers



What the Transformation Journey Taught Us



Migration scope and constraints surface late if you wait — building the plan up front compresses everything that follows.



Long-lived and in-flight cases don't all move cleanly. Understanding the limits before commitment shapes a realistic delivery plan.



Tooling like Blueprint and Migrator Plus would have meaningfully shortened the timeline. The next implementation should not start without them. Could have saved **3–4 months of development time**

Powering Success Through Strategic Collaboration

NFCU, Capgemini, and Pega – One Unified Team

- **Business-IT Alignment:** Unified team aligned business goals with tech execution
- **Co-Creation & Agile Delivery:** Iterative workshops and sprints enabled rapid feedback
- **Complementary Strengths:** NFCU: Business | Capgemini: Deliver | Pega: Innovation
- **Outcome-Driven:** Faster transformation, high quality, scalable solution



**Challenger
Mindset**



**Strategic &
Comprehensive
Transformation**



**Fresh
Insights**



**Commitment
to Business
Value**

From transformation to “Transformation Transformed”



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