



A Connected Digital Foundation for the **Future of Pensions**

Modernise Pension Operations
Accelerate Member Outcomes
Stay Ahead of Regulatory Change



Built on NewgenONE, the Intelligent Pension Solution orchestrates content, processes, AI, and customer communications together on a unified digital foundation for pension operations. It enables pension providers to streamline operations, manage information with greater control and deliver personalised member experiences at scale. By extending existing pension administration systems, it helps modernise the pension ecosystem while improving operational efficiency, agility and member engagement.



Regulatory Change is Reshaping Pension Operations, Pension Transformation is No Longer Optional

The pensions landscape is being fundamentally redefined by:

- UK Pension Dashboards Programme (PDP)
- Value for Money Framework
- Wet toekomst pensioenen (WTP)
- Digital Operational Resilience Act (DORA)
- GDPR and evolving data governance requirements
- Pension Schemes Act
- Consumer Duty
- European Accessibility Act (EAA)
- Insurance Distribution Directive (IDD)

These initiatives demand accurate member data, transparent record keeping, auditable processes, operational resilience, and highly personalised communications.

The Growing Complexity of Pension Operations

Legacy Systems & Fragmented Information

Member information sits across administration systems, legacy repositories, paper records, emails and spreadsheets, resulting in slower processing, limited visibility and higher compliance risk.

Evolving Member Expectations

Members expect digital self service, personalised communications, real time access and consistent experiences, while fragmented systems make engagement difficult to deliver at scale.

Rising Costs & Operational Risk

Manual, document intensive processes drive higher costs, delays and specialist dependency, while growing volumes of sensitive information demand stronger security, governance and auditability.



The solution brings together two key capabilities:

- Records, Content & Data Management
- Member Communication Management

Records, Content & Data Management

- Centralised, secure content hub for pension correspondence and member documents, with retention controls
- Automated capture, classification and intelligent extraction to reduce manual effort and improve accuracy
- Records management, legal hold and immutable audit trails for compliant record keeping
- Dashboards ready, standards compliant member data with reporting and insights for operational decisions
- Pre built API connectors to pension administration platforms and regulatory portals

Member Communication Management

- Automated, personalised communications across the member journey, including statements, projections, benefit illustrations and regulatory notices
- Accurate batch and on demand output, generated at scale and delivered on time
- Flexible template design, authoring and controls for consistent branding, governance and compliance
- Multichannel and multi language delivery across email, SMS, print and web channels
- Communication tracking and delivery monitoring for greater visibility and proactive follow up

Delivering Measurable Pension Outcomes



Strategic Outcome	Business Value Delivered
Transform Processing Efficiency	Accelerate retirement, transfer, benefit payment and servicing processes through faster access to information and automated workflows.
Elevate Member Experience	Deliver timely, relevant and personalised communications across channels, improving engagement, satisfaction, trust and communication accuracy.
Strengthen Regulatory Readiness	Support WTP, Pension Dashboards, Consumer Duty, DORA, GDPR and EAA through stronger governance, controls, auditability and reporting.
Reduce Cost to Serve	Reduce manual processing, document handling and communication effort while improving workforce productivity and operational efficiency.
Improve Data Confidence	Create a trusted source for pension records, correspondence and member data, improving data quality, accessibility and reporting.
Future Proof Pension Operations	Build a scalable digital foundation that supports evolving regulations, member expectations and future business needs.

Proven Impact for a UK Pension Provider

250+ Hours Reclaimed Every Month

Administrative effort significantly reduced through document-based automation.

78% Faster Approvals

Approval cycles reduced from 9 days to 2 days.

70% Reduction in Content Handling Time

Improved document accessibility, governance, and processing efficiency.

25% Lower Cost Per Member Interaction

Reduced operational costs while enhancing service quality and responsiveness.

Ready for Pension Dashboards. Prepared for WTP. Built for the Future of European Pensions.

NewgenONE empowers pension providers to modernise operations, strengthen compliance, reduce costs, and deliver the seamless digital experiences that today's members expect.

About Newgen

Newgen Software Orchestrates Intelligent Enterprises at scale. The NewgenONE Platform unifies content, processes, and communications into an orchestration layer where intelligence is embedded into how enterprises operate, with trust, governance, and control built in. Enterprises move beyond fragmented initiatives to continuously adaptive, production-ready operations. Decisions, workflows, and experiences evolve in real time, shaped by context, data, and embedded AI. Trusted by leading organizations worldwide, Newgen defines how modern enterprises operate, intelligently and at scale.

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