



A Superannuation Fund Strengthens Member Service Operations Through Unified Orchestration



A photograph of three middle-aged men with grey hair and beards, wearing business suits, sitting around a wooden table. They are looking at a laptop screen which displays several charts and graphs. The man on the left is smiling and pointing at the screen. The man in the middle is also smiling and looking at the screen. The man on the right is looking at the screen with a serious expression. The background shows a window with greenery outside and a potted plant on the table.

Customer Overview

The customer is a large superannuation services organisation delivering retirement savings, investment, and member servicing operations at scale. Operating in a highly regulated environment, the organisation manages significant volumes of member transactions, including withdrawals and contributions, while maintaining strict compliance, reporting, and service-level requirements. The organisation continues to focus on strengthening operational efficiency and delivering consistent member service experiences across multiple service channels.

Business Context and Transformation Intent

As service volumes grew, the organisation required a more structured and transparent operational model capable of handling member requests across multiple intake channels while maintaining strong SLA adherence, compliance oversight, and consistent service delivery. The objective was to move from fragmented workflows toward a coordinated, automated, and visibility-driven operations framework.

Key Operational Challenges

Several operational limitations were affecting efficiency and member experience:



Withdrawal and contribution handling processes were fragmented and required significant manual intervention, resulting in delays

Limited end-to-end visibility and SLA tracking increased the likelihood of escalations and compliance risks



Communication across channels lacked consistency, leading to an inconsistent member experience

The absence of a unified orchestration environment created duplicate effort and higher operational costs



There was a growing need for proactive monitoring, faster issue resolution, and transparent service management

Newgen's Strategic Fit

The organisation required a unified digital workspace capable of orchestrating processes, enabling omnichannel intake, automating routing and alerts, and providing real-time dashboards for SLA tracking, compliance monitoring, and operational visibility across departments.

Transformation Approach

To address these challenges, the organisation introduced a unified operational workspace designed to orchestrate processes, automate case handling, and provide real-time operational visibility.

The implementation enabled:

- ▶ Streamlined handling of withdrawal and contribution processes through a unified workspace
- ▶ Omnichannel intake across portal, email, mailhouse, and call center channels
- ▶ Automated routing supported by proactive alerts to reduce manual intervention
- ▶ Centralised dashboards and reporting for improved visibility into requests, SLAs, and compliance
- ▶ SLA monitoring at both process and departmental levels
- ▶ Case prioritisation based on business impact to ensure critical requests were handled first
- ▶ End-to-end orchestration supporting collaboration across teams and systems



Business Impact and Value Delivered

Area	Impact
Operational Efficiency	Automation and proactive workload distribution improved handling efficiency
Compliance and Governance	Real-time SLA tracking, dashboards, and audit trails strengthened oversight
Case Management Visibility	Unified dashboards provided end-to-end visibility into requests and queues
Service Experience	Consistent and transparent communication improved member experience
Operational Scalability	Established a scalable foundation to extend automation across additional processes

Building a Scalable Service Operations Foundation

By implementing unified orchestration, real-time monitoring, and automated case management, the organisation strengthened operational visibility, improved SLA tracking, and enhanced service handling efficiency. This transformation established a scalable service operations foundation, enabling the organisation to manage service volumes more effectively while delivering consistent and transparent member service experiences.



About Newgen

Newgen is the leading provider of an AI-first unified digital transformation platform with native [process automation](#), [content services](#), [customer engagement](#), and [AI/ML](#) capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low-code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries, Newgen unlocks simple with speed and agility.

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FEB 2026