A UK-based Pension Provider's Journey to Smarter Content Management with Newgen

Saved 250+ Man-hours per Month Through Efficiency Boost

Who Is The Customer?

The customer is a trusted provider of workplace pension schemes in the UK. Operating for nearly eight decades, the organization offers diverse pension solutions, including fiduciary management services, defined contribution, and defined benefit pension schemes. It works with employers, members, and advisers to offer the most appropriate pension solutions.

The organization focused on leveraging technology to maintain its position as a top service provider. It partnered with Newgen to enhance the experience for its members and modernize its system to meet the changing demands.

Bleeding Efficiency Through Paper Cuts

Let's look at the challenges that the company faced and the possible solutions they were looking for:

- **Reliance on Legacy System:** Excessive dependence on outdated, third-party systems for document storage and access caused inefficiencies.
  The Fix: Break free from legacy systems and move to a modern, centralized document management solution to support scalability and ease of access.

- **Integration Gaps:** The current system was not adequately integrated with core pension platforms, Global Banking Software Technology (GBST) Composer, or Customer Relationship Management (CRM) systems.
  The Fix: Implement seamless integration across all critical systems to ensure smooth, end-to-end business processes and data consistency.

- **Manual Document Handling:** Document management was heavily manual, which slowed down processing times and increased errors.
  The Fix: Automate document handling workflows to improve efficiency, accuracy, and turnaround time.

- **Lack of Standardized Metadata:** Without standardized metadata tagging, documents were hard to search and unreliable.
  The Fix: Automate document classification, metadata tagging, and routing through AI-powered workflows for faster retrieval, higher accuracy, and improved operational efficiency.

- **Audit & Compliance Nightmares:** Audits dragged on, and compliance became harder to manage due to siloed, manual handling.
  The Fix: Establish automated audit trails and compliance monitoring features to meet regulatory requirements and streamline audits.

Securing The Golden Years With Newgen

The organization selected Newgen to digitize its document systems to address the challenges. **NewgenONE** Enterprise Content Management, built on an AI-first, low-code platform, offers a scalable, unified repository for simplified, safe, and efficient document management and archival.

Implementation Highlights

Document Digitization & Metadata-tagging:
End-to-end digitization of documents (including KYC, Premium letters, Receipts, Blue Form, Quotations, Pay Slips & Tax Statements, Income Payments, Death Certificate)

Integration with Core Pension Platforms:
Robust APIs enabled easy integration across legacy and modern systems

User-friendly Web Portal:
A simplified, browser-based interface ensured easy access & navigation by business users

Version Control and Audibility:
The system offered automated versioning, full audit trails, and real-time compliance dashboards

Access Control & Security:
Enabled device-agnostic browser access by removing the reliance on VPNs

Compliance-ready Framework:
The solution complied with key regulatory and security standards, including GDPS, DORA, GDPR, and RBAC

What's Better Now

*Made documents **instantly searchable** by streamlining document retrieval*

*Eliminated siloes to ensure **better transparency** and **automated workflows** across platforms*

*Simplified digital portal **reduced training effort** and boosted adoption*

*Cut manual audit preparation, **improved monitoring,** and enabled system-generated compliance reports*

*Access became simpler and safer with **reduced dependency on VPNs** or controlled desktops*

*Reduced regulatory risks and strengthened **content security***

Smart Content Management In Action

Content handling time
Reduced by more than
70%

Approval time
Cut down
from 9 days to under 2 days

Manual audits
Reduced by
60%

Straight-through processing
Increased from
75% to over 90%

Per-member service cost
To decline by
25% over the next 5–10 years

Manhours saved
Reclaimed
250 hours per month

Turning Pages Into Progress

Newgen transformed a slow, chaotic and outdated process into a streamlined digital powerhouse. This integration helped automate document-centric workflows, manage data effortlessly, and enable quick approvals. It eliminated legacy headaches, allowing the customer to work not just faster, but smarter! This partnership empowered the customer to serve their members more quickly and securely than ever before, positioning the company for many more years of market leadership.

About Newgen

Newgen is the leading provider of an AI-first unified digital transformation platform with native **process automation, Content services, customer management,** 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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