Leading Continuous Change
with Platform, Process, and People

Change is the only constant in life, and if we've learned anything from 2020, it's that you better be prepared. At Sagitec, we have ingrained the mantra of "continuous improvement" into every part of our organization – our **Platform**, **Processes**, and **People**.

Here's how:

Our Commitment to **Platform Evolution**

Sagitec entered into the pension market in 2004, a time when organizations were purchasing solutions with a predetermined date of death. Sagitec's distinct objective was to create a platform for the pension industry that:

- Responds to continual shifts in the underlying technology
- Mitigates the risk of technical obsolescence
- Works as an evolutionary platform that can adapt, survive, and thrive

By its very nature, a platform designed to meet the above objectives is ever-changing and constantly evolving. Sagitec's Platform provides you with everything you need today and has the tools to build what you may need tomorrow. Build enterprise-ready applications exceptionally fast and leverage powerful visual development tools to enhance your applications. Plus, you can update applications quickly and efficiently or rely on a regular platform release or upgrades filled with new features. These upgrades are prioritized and added to our product roadmap based on:

- Direct customer requests
- Listening to customer pain points and strategically solving them
- RFP requirement trends from prospective customers
- Industry trends
- Ideas from customer code projects
- Employing and retaining extremely skilled experts who have a passion for continuously gaining knowledge

Adopting a platform that employs a regular upgrade cadence makes it possible for developers to focus on "what" to do, rather than on "how" to do it, allowing your organization to:

- Expedite the time it takes to develop and deploy new functionality
- Improve development and testing quality standards
- Ensure consistency and maintain a great user experience across your application for your end-users
- Better manage your organization's resources and enable your specialized IT staff to focus on proactively evolving your solution
- Ensure you are using the latest technical advancements
- Employ industry-leading practices and take advantage of industry trends
- Improve application performance

In addition to mitigating the risk of technical obsolescence, upgrades will:

- Provide you with new and innovative enhancements to solve real problems and improve efficiency
- Eliminate glitches from using older technology
- Provide robust security and compliance aimed at continuously evolving threats
- Provide an immediate and long-term return on your overall investment and reduce your true cost of ownership
- Allow for optimizations and performance enhancements
- Empower your staff to learn new technology inherently providing them with opportunities for growth
- Supply you with the best-in-class technical support from Sagitec

Your organization likely spent millions of dollars to "modernize" your pension administration solution. But, "modern" is a point-in-time and doesn't extend over the long-term. Partnering with Sagitec moves you beyond just being modern and provides the means to mitigate the risk of technical obsolescence for good because you will evolve as technology evolves. Sagitec's platform will keep you a step ahead and enable you to be a technology leader in your industry.

Sagitec is committed to evolving our product for you. We want to provide smart choices for organizations that haven't had that option in the past. What is required of you? We ask you to be just as committed to this evolution and position yourself to make the most return on your investment. Adopting new technology may sound risky, but we believe it is a step toward being risk-averse!

Our Commitment to **Processes Evolution**

Many companies fall in the industry trap of evolving their base product without committing to developing the people and processes to support their product. We choose to take a different approach. We are committed to excellence – we expect more of ourselves and set expectations to get better every day. We use the same inputs gathered for our product roadmap and apply them to improve in other areas in the company. Talk to any of our long-term customers and you will hear that Sagitec's processes get better year after year.

Here are a few examples of process improvements we'd like to share with you:

Center of Excellence – Delivery

When we were a start-up with a few customers, standardization across projects and processes wasn't the primary priority. As we've grown, however, one of the delivery philosophies we've developed is to lean on standardization as a method for continuous improvement. Recently, we launched a Center of Excellence intending to standardize delivery processes across customers. Among these standards include a developer handbook enforcing guidelines and best practices for our teams to follow through internal processes and tools.

Our goals for each project include:

- Perform code audit for meeting standards and best practices
- Review the automated Code Inspector Tool results
- Review the coverage of unit and integration testing
- Certify the code before a vital project milestone

DevOps with Continuous Integration/Continuous Delivery

After listening to our customers and project teams talk about challenges with release management, Sagitec launched DevOps, short for Development Operations, across a variety of projects projects. Our DevOps team uses a combination of tools to maintain source code and perform build and release automation based on the project needs at the time of planning and implementation. We fix bugs early so we can deliver on our 'build once, deploy many – early and often' philosophy. Our vision is to manage the source code and releases transparently, ensuring we maintain changes across teams, and our end-users reap the maximum benefit.

Reusability of Code and Components

Our focus has always been to create reusable code and components and to make it available to you out of the box. Our teams are consistently improving our code base with inputs from our customer teams so they are available in our future releases.

We produce significantly fewer lines of code than typical software applications. We achieve this by offering our clients a full-featured, externalized business rules engine, an externalized business process modeling and execution engine, along with a design studio for generating Web forms, data binding, correspondence generation, and interface file management. Fewer lines of code mean fewer intrusive software changes, reduced regression testing, improved performance, and improved agility. You can manage change and reduce risk simultaneously. While most of our competitors are busy re-coding their systems to untie the rules implemented for earlier clients, we focus our time and energy on your unique business problems. You pay a vendor for your software application, not for the time it takes to untie business rules from older systems.
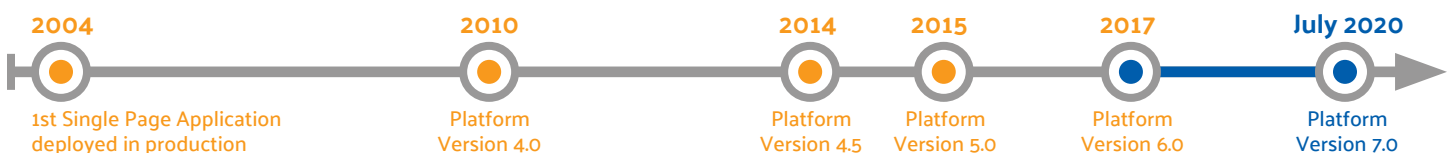
Automate Unit and Integration Testing

The most used word in the testing world right now is "automation," and it is no different at Sagitec. We look for ways to automate our testing services, making it easy for customers to release upgrades, changes, and new functionality. Our tool for automating testing, the Sagitec Test Studio (STS), can be customized to run a suite of test cases or a small list based on customer needs. The STS user interface enables customer teams to design the test cases, and we implement it through build automation.

Sagitec's future is in automation. We cannot achieve our vision without automating wherever possible. It's through automation that we can support activities, like continuous testing and capitalizing on new trends, and technology, including service virtualization, artificial intelligence (AI), business intelligence (BI), and machine learning. In addition to constant automation, we have established goals around specialized SWAT teams designed to focus on certain types of in-depth testing. Additionally, as a trusted and transparent relationship is vitally important to us and you, our customers, we aim to collect more accurate data and provide better metrics around testing so we can keep our eye on continuous improvement.

Reduction in Time to Upgrade

Continuous upgrades are a key differentiator when it comes to Sagitec's value proposition for customers. Over the years, we have become better and faster at upgrades. The proof is in the data. According to our internal client base records, customers took nearly 16 weeks to upgrade to version 4.0 of our Platform (released in 2010). Fast forward to our most recent upgrades from 5.0 to 6.0, and many customers completed their upgrade in just 6 weeks.

2004	2010	2014	2015	2017	July 2020
1st Single Page Application deployed in production	Platform Version 4.0	Platform Version 4.5	Platform Version 5.0	Platform Version 6.0	Platform Version 7.0

As we roll out version 7.0 at the end of 2020, our goal is an end-to-end upgrade in 4-weeks. This would save our customers valuable time, reduce the amount of time code is frozen to changes, and make it feasible to upgrade more often. This example refers to upgrading from one major version to another. Minor upgrades take far less time. Customers who upgrade quarterly to the newest minor release spend just about a week for the entire upgrade, including user acceptance testing.

Our Commitment to **Personal Evolution**

Our people truly power Sagitec. Driven by a commitment to client success, they advance the Platform and processes by leveraging knowledge and expertise. We embrace collective ownership that inspires everyone to be bigger than ourselves. As a result, Sagitec can grow the role of our people through accountability and empowerment.

Sagitec's commitment to personal evolution centers on three core tenets:

Purpose Driven Work

What we do matters not only to our clients but to the communities they serve. Each Sagitec employee understands the importance of the services your organizations provide, and we take pride in delivering solutions that help your members live happier lives. This recognition creates a more engaged and motivated workforce where everyone can and wants to make an impact.

Values-Based Culture

At Sagitec, we strive to embody our core values in all we do. These foundational principles drive our actions, guide our decision-making process, and reflect what matters most to us as an organization.

- Be a trustworthy partner to our customers
- Maintain a healthy and high-functioning work environment
- Promote an atmosphere of continuous innovation and improvement
- Share the right information with the right people at the right time
- Commit to achieving business results in an ethical and honest manner
- Be bigger than ourselves

Pursuit of Excellence

"Excellence is the gradual result of always striving to do better." – Pat Riley. At Sagitec, we encourage people to find and cultivate excellence in themselves and each other, inspiring us to develop collaborative relationships, view our failures as learning opportunities, persevere in the face of adversity, and become more capable than before.

Conclusion

As Sagitec continues to grow, we firmly believe our clients' success drives our success. We reinvest our profits into our base solution and service offerings, ensuring our clients have the most advanced technology – solutions that resist obsolescence and pave a path forward amidst changing legislative policies and technological advancements.

Our customers directly drive our strategic plan and product roadmap, ensuring that we meet the changing needs of the benefits administration industry. We developed a comprehensive customer advocacy program that ensures we achieve our goals surrounding continuous process improvement and innovation while providing our customers with the ongoing support they need to serve their customers best.

About Sagitec

Sagitec Solutions, LLC, is a global software provider focused on solving complex, business-rule driven problems with domain experts and proven technology. Sagitec designs and delivers complex benefits administration software – pension, unemployment insurance, paid family leave, disability, and healthcare solutions to clients of all sizes. Understanding that a dynamic world requires dynamic technology, Sagitec offers solutions that are highly configurable, rule driven, and extensible by nature. With deep industry experience in software implementation and systems integration, project management, knowledge management, predictive analytics, chatbots, cloud services, consulting, hosting, and software support, Sagitec is a partner clients can trust to drive their vision into action. For more information, visit: **www.sagitec.com**