Plexus Digital Engagement (PDE)

Accelerate digital engagement through configurable customer portals

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Keylane



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Agenda

01 From portals to components

02 PDE Roadmap 2027

03 Portals, customer journeys & AI

04 Wrap-up & questions

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From portals to components

A reusable foundation for customer-specific digital experiences.

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The strategic shift

Today

Standard portal products

Participant portal
Pension

Employer portal
Pension

Advisor portal
Pension

Customer portal
Life

The portal is the primary product boundary.

Tomorrow

Generic component library

Reusable components across customers

Composable into customer-specific portals

Room for customer-specific components where needed

The component becomes the reusable product building block.

Shared by default

Configurable where possible

Customer-specific where it adds real value

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The strategic shift

Life and Pension remain distinct where the technology requires it.

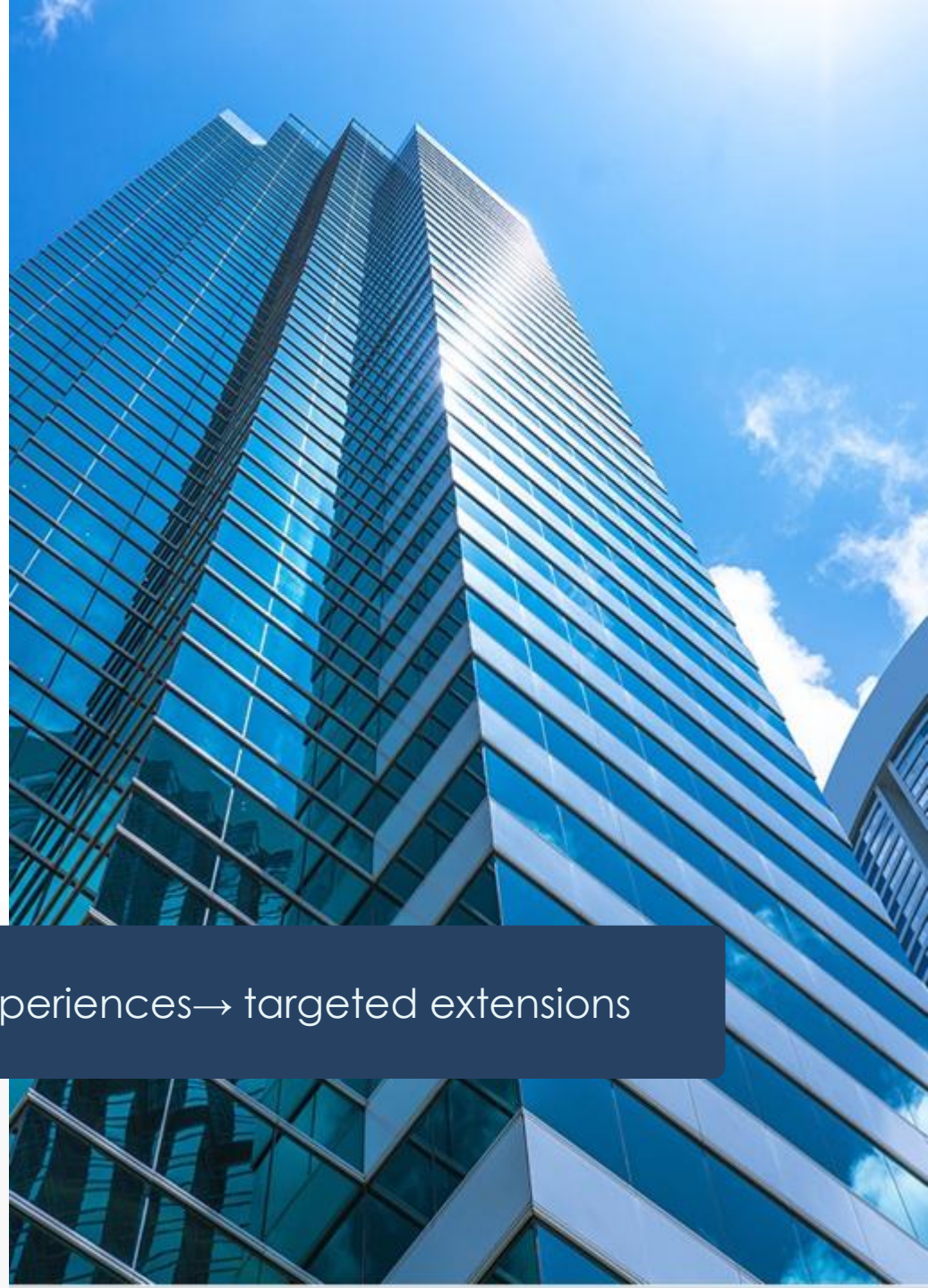
01 Pension component stack

Components for participant, employer and advisor experiences in the Pension domain. The goal is maximum reuse across customers on the Pension technology stack.

02 Life component stack

Components for customer and advisor portals in the Life domain. The goal is maximum reuse across customers on the Life technology stack.

Strategy: Reusable building blocks → configurable experiences→ targeted extensions



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What this changes for PDE customers

Accelerate digital engagement through configurable customer portals.

Reuse first

Generic components can be improved once and then reused across the customer base, reducing duplicated product development.

More flexibility

Customer portals can be assembled and configured around the experience that fits the customer, rather than forcing one fixed portal shape.

Focused customization

Customer-specific components remain possible, but are used deliberately where configuration or generic reuse is not enough.

PDE roadmap 2027

Generic capabilities that strengthen every digital experience.

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Six roadmap themes

A focused view on the capabilities behind future PDE experiences.

01 WCAG

Web Content Accessibility Guidelines

02 Configuration

CMS & portal configuration

03 Video Engage

Visual guidance in journeys

04 AI

Development & visitor experience

05 Statistics tooling

Faster data availability

06 Performance

Insight for employer experiences

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Raise the usability and accessibility of our portals

Accessibility is a product capability, not a one-off compliance project.

- Clearer interaction and navigation patterns
- More consistent, accessible component behavior
- Improvements become reusable across customer portals

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How customers could configure more of the portal experience

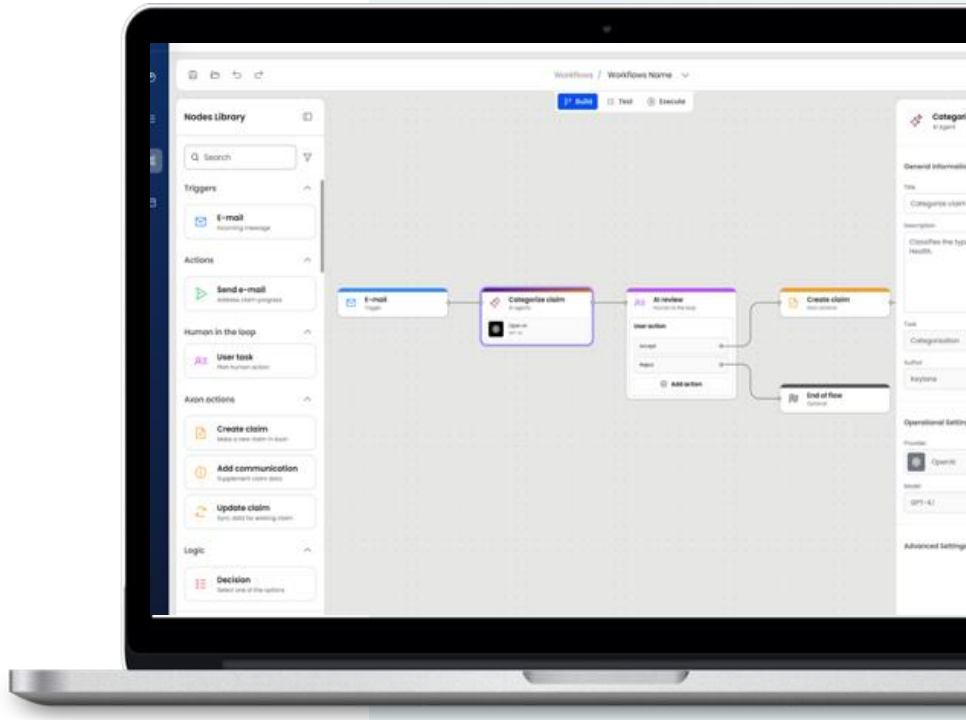
02

Configuration

CMS answers: **“What content do I show?”**

The next question is: **“How much of the portal can I configure?”**

- Explore component-based portal configuration
- Research tooling such as Storyblok as an example direction
- Balance customer control with SaaS consistency and reuse



Demo moment:
Show current idea of Storyblok

Your view:
Which parts of a portal would you want to configure yourself?

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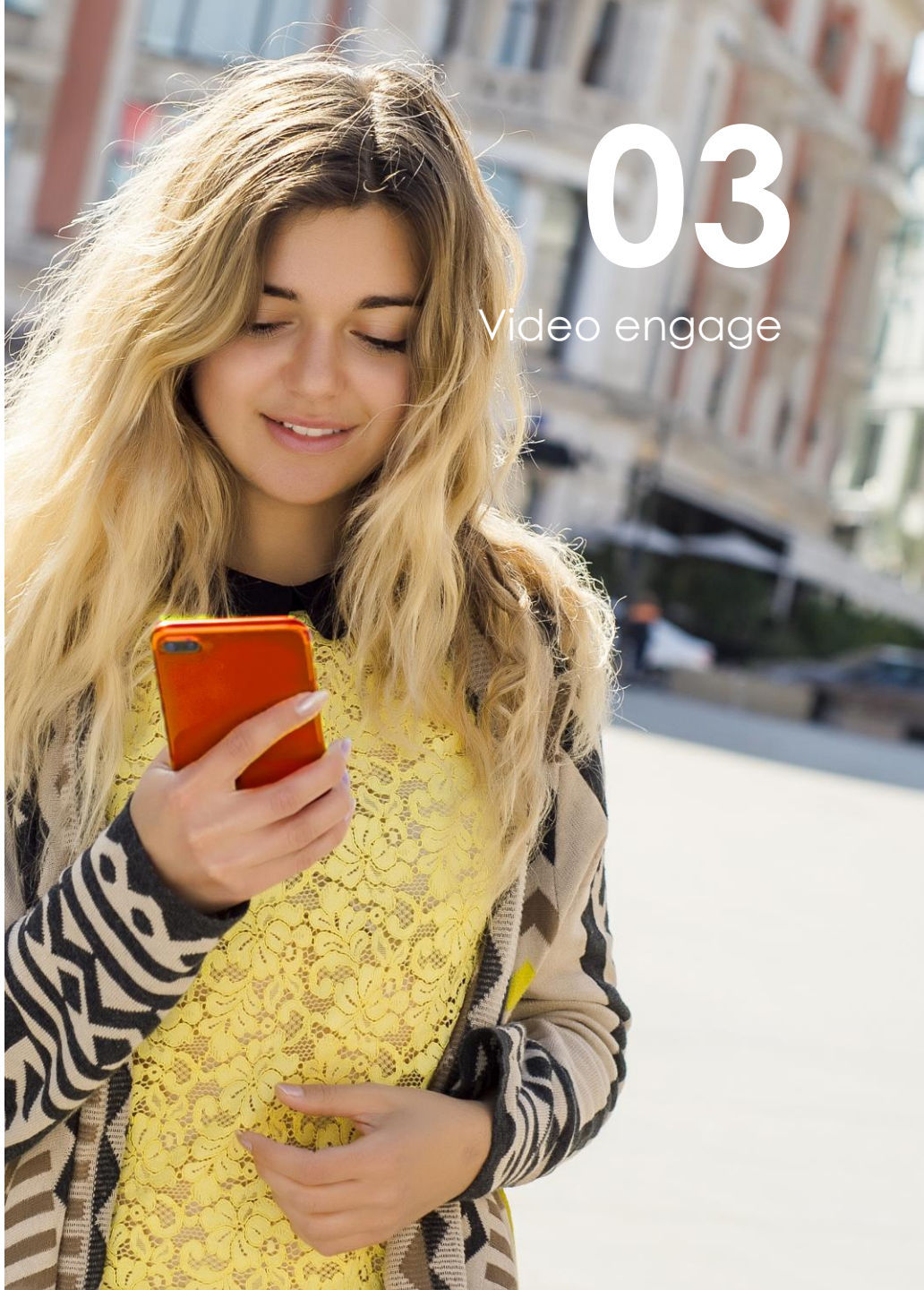
Bringing explanation and guidance closer to the moment of choice

Concept: Use video as a reusable engagement component inside digital journeys.

- Explain complex pension or life topics in context
  e.g. UPO or extra savings
- Support guidance at decision points
  e.g. pension planning
- Combine visual explanation with existing portal data and journeys

Demo (NL) Demo (EN)

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Two horizons: how we build, and how portal visitors interact

04
AI

01 AI for developers

Best practices for PDE currently:

- Creating test cases based on epic info (via ChatGPT)
- Creating documentation based on the code (via Claude)
- Code reviews for FE and BE
- Efficiency and quality increase in development process

02 AI for portal visitors

Explore whether conversational AI can complement today's data-driven portal experiences and help visitors understand or navigate complex journeys.

Your view:
If a visitor can ask instead of click: does the customer journey itself change?

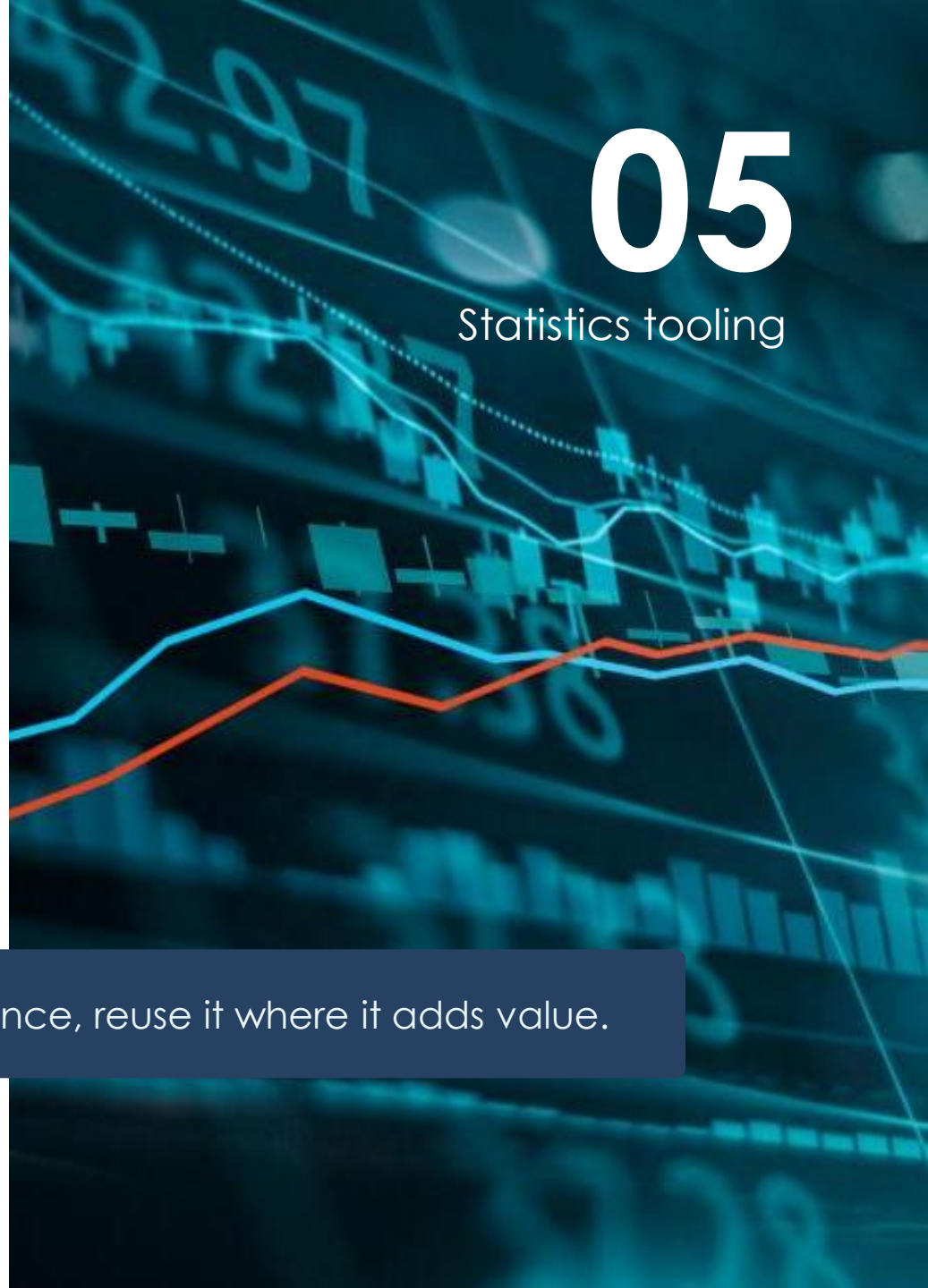


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Turn portal activity into insight - with the Employer portal Epic

05

Statistics tooling



What the epic is about

- Make relevant usage and process statistics visible based upon predefined KPI´s
- Help employers and service teams understand activity and progress
- Create a generic statistics capability that can grow beyond one portal

Demo

Roadmap principle: build the insight component once, reuse it where it adds value.

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Event driven architecture. From pull to push mechanism.

06

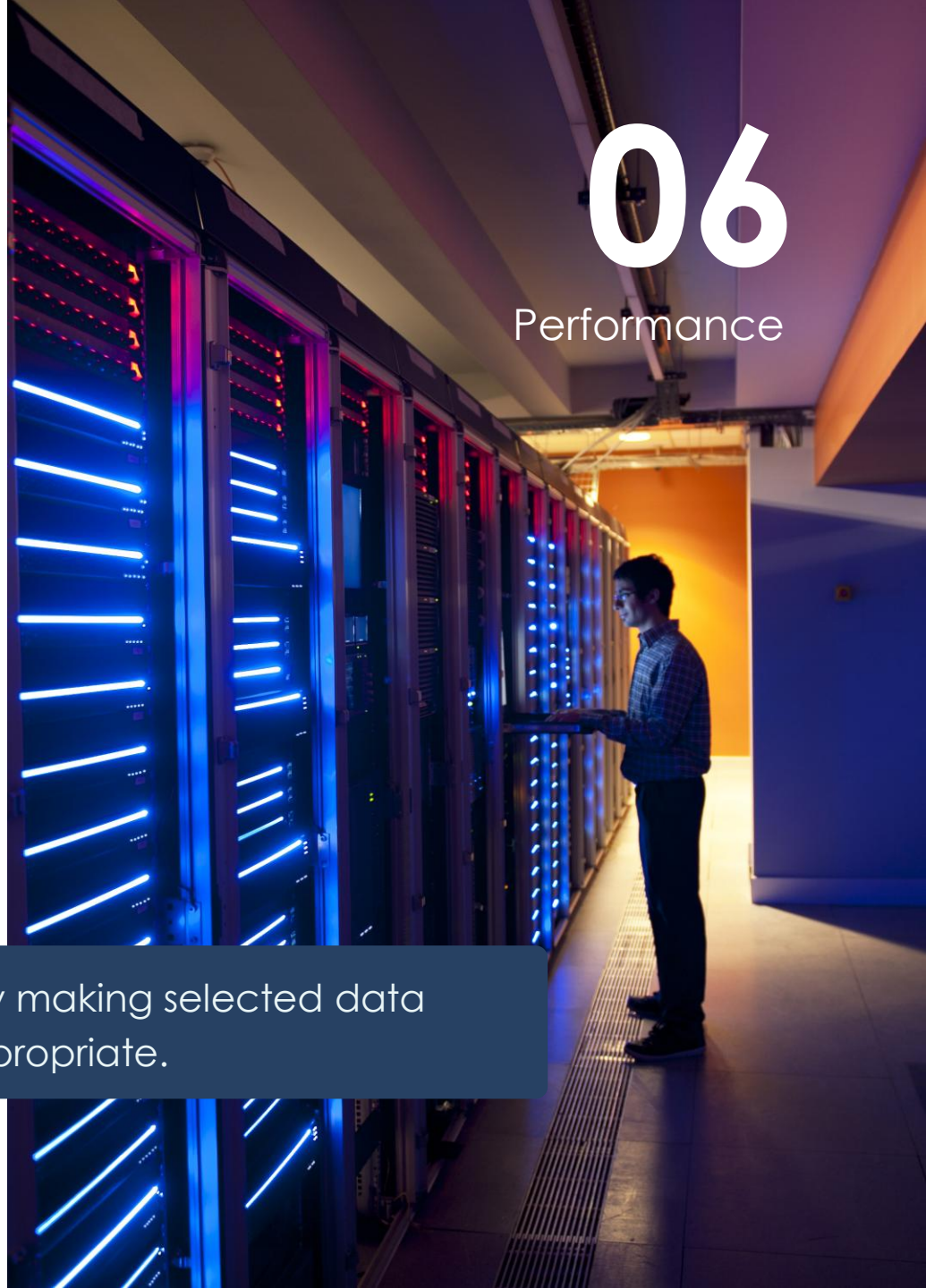
Performance

Event-driven architecture (EDA) changes communication between front-end portals and administration back offices from mainly pulling data to receiving updates when something changes.

Focus areas

- First dashboard after login
- Pension detail pages
- Employer and advisor-specific pages

Direction: Reduce request-time back-office retrieval by making selected data available earlier / push-based where appropriate.



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Five key messages to take away

- **Components over fixed portals**
  Reuse becomes the default product model.
- **Life and Pension remain distinct**
  One strategy, two technology domains.
- **2027 strengthens the platform**
  WCAG, configuration and performance benefit every customer.
- **Engagement keeps evolving**
  AI and video can change how visitors are guided.
- **Customer input shapes the direction**
  Configuration and conversational AI need your perspective.

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Questions?

And one final question from us:

what should be the next reusable PDE component?

