

## ODE/NMS - Quarterly Business Review

Aligning on Vision, Priorities & Possibilities.



20 August 2025.

## Agenda

#### **MEETING TOPICS**

#### Pega Cloud

- Revisit Cloud Migration Assessment: Work Done & Recommendation
- Compliance with Regulatory Standards: FedRAMP

#### Pega roadmap

- Pega Process Al
- Pega Agentic Al
- Pega Knowledge Buddy
- Constellation vs. Traditional UI
- Exploring ACDV APIs



# Pega Roadmap: Process AI and Agentic AI

By Anthony Leonardi.





## Operationalizing Success

How do we innovate while growing the business?

TODAY'S ENVIRONMENT

OPERATIONAL LANDSCAPE

WHY PROCESS AI

NEXT STEP

## Likely suspects delaying Al adoption

#### **CHALLENGES OF AI ADOPTION**



#### **OPERATIONALIZE AI**

#### Access to Resources

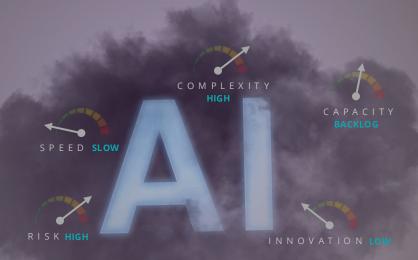
Preparing data, training models, and operationalizing Al is slow expensive, and requires a team of experts

## Complex and ever-changing policies

Organizational innovation is stymied by the inability to keep up with best practices on implementing corporate policies when using Al technologies

#### **High-risk manual process**

Manual work and intervention is required to address compliance requirements and to monitor and respond to model performance – which increases operational cost and risk



#### **No-Code AI and Decisioning**

Put the power of AI in the hands of the business

#### Transparency and Bias Management

Easily ensure you're using Al according to corporate policies and the highest ethical standards

## Model Ops and testing new approaches

Manage Al and Decisioning Ops with just a few mouse clicks



## Improving customer experience

Including AI and decisioning at each customer interaction





#### **Personalize** engagement

Improve sales, retention & marketing with cross-channel Next Best Action.



**CUSTOMER DECISION HUB** 

#### **Anticipate** service

Deflect calls and increase NPS with Intelligent Virtual Assistants, preemptive outreach, and NBA agent recommendations.



With **CUSTOMER SERVICE** & COLLECTIONS

#### **Optimize** operations

Reduce cycle time and improve operations effectiveness with OOTB self-learning workflows and Al model operationalization.



With **PROCESS AI** 

#### **Accelerate** work

From application creation, to customer engagement, to the answers you need use Pega GenAl<sup>TM</sup> to do your work faster.



PEGA GENAI™

Customer context



Ethical Bias



Business rules



Live data



3<sup>rd</sup> party models



Case data



Real-time events



Advanced decisioning



Predictive models



Adaptive models











## Forrester Leader

#### Al Decisioning Platforms (2025)

"Pega's approach is timeless — it aims to build a platform that enables enterprises to "design for people, build for change." The company is now using Al to do that, infusing it into every platform capability, including Pega GenAl Blueprint, which enables users to generate full decisioning workflows and Al agents using natural language. Pega is firing on all cylinders with its superior vision, innovation, roadmap, partner ecosystem, adoption, and support services."

## Al Decisioning Platforms Wave Report (2025) Forrester Research

According to Forrester, enterprises must blend human expertise, business rules, and machine intelligence to compete in the modern marketplace. **Pega Process AI** was selected as a leader in this evaluation with perfect (5.0) scores in the following categories:

- Data Modeling & Integration
- · Decision Testing
- Cohesive Experience
- Observability & Extensibility
- Strategic Vision
- Roadmap & Innovation
- Partner Ecosystem
- User Adoption
- Supporting Services





Top 5 Healthcare **Payer** 

\$7+ million

savings from reducing SLA penalties

\$3+ million

savings in overtime

\$6+ million

administrative cost savings through increased efficiency

**CHALLENGES SOLUTION** 



### Pega GenAl Blueprint

Workflow and Decisioning Tools

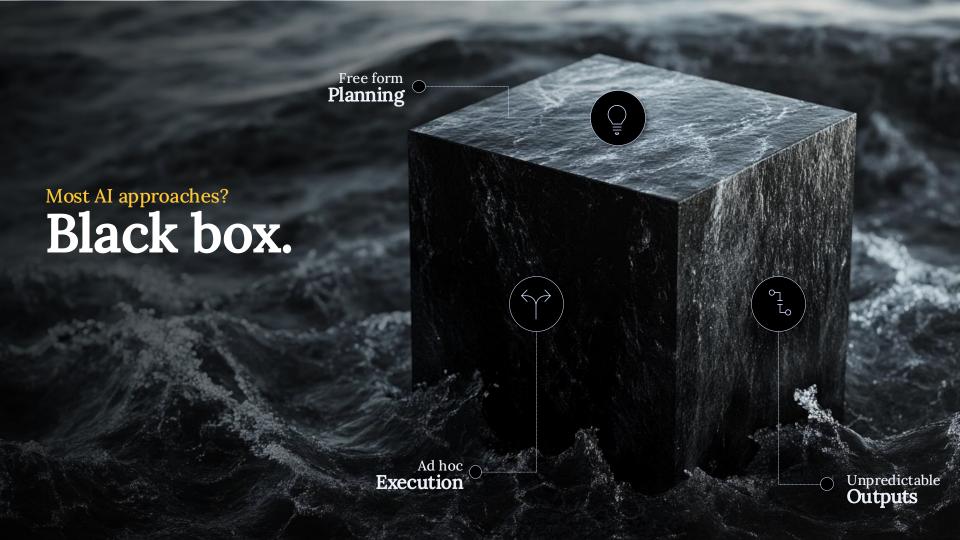
Agentic Strategy

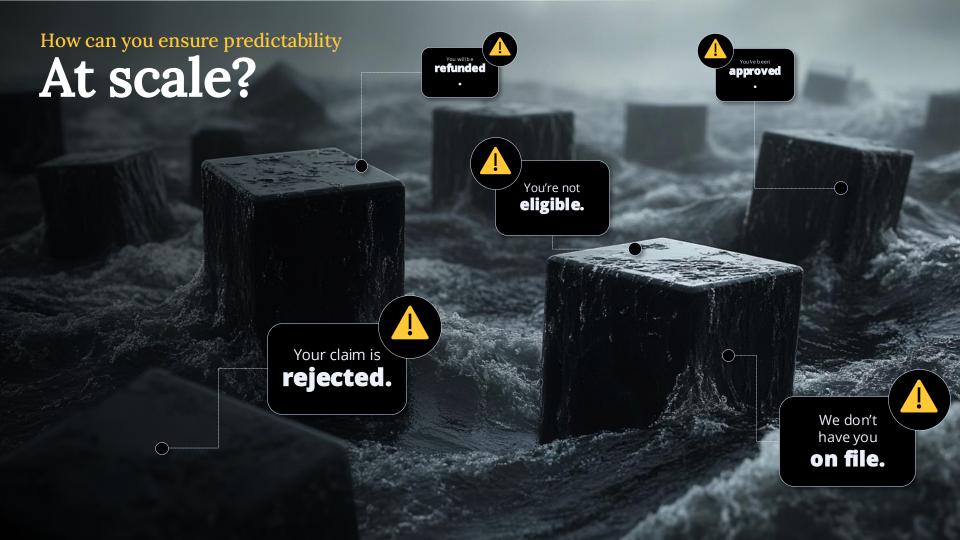
## **Customer Feedback**

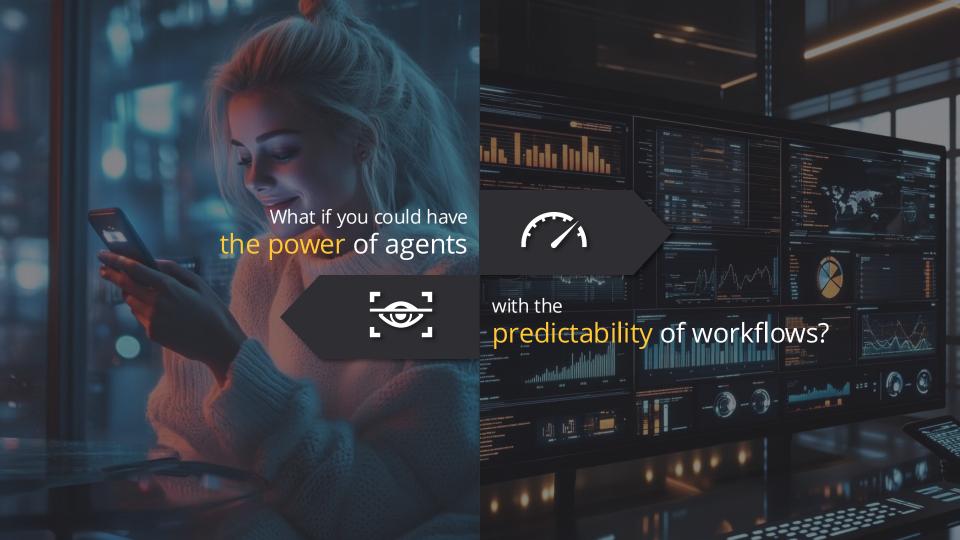
"Pega GenAI Blueprint enables users to generate full decisionin, workflows and build AI agents using natural language" Implementing the Pega Platforr. broke down customer data silos unified processes, and most importantly, enabled hyperpersonalization for millions of consumers."

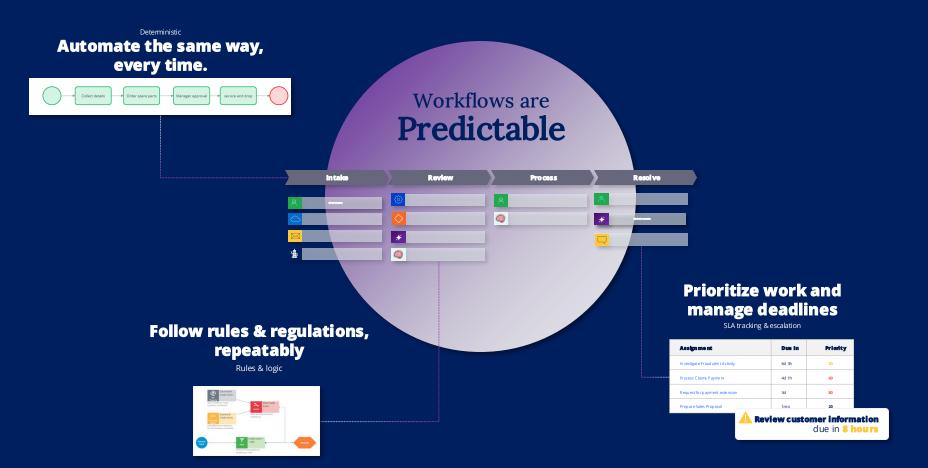
Pega Infinity Platform (Process AI)



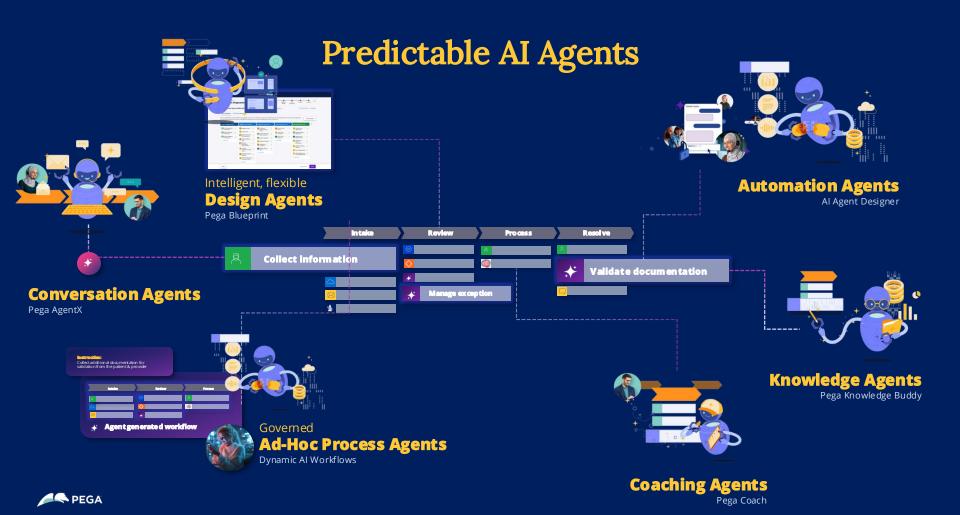












## Fully governed conversation agents

Guided by Structured Pega AgentX Workflows



Self-service For customers & employees

## **★** Agentic workflows

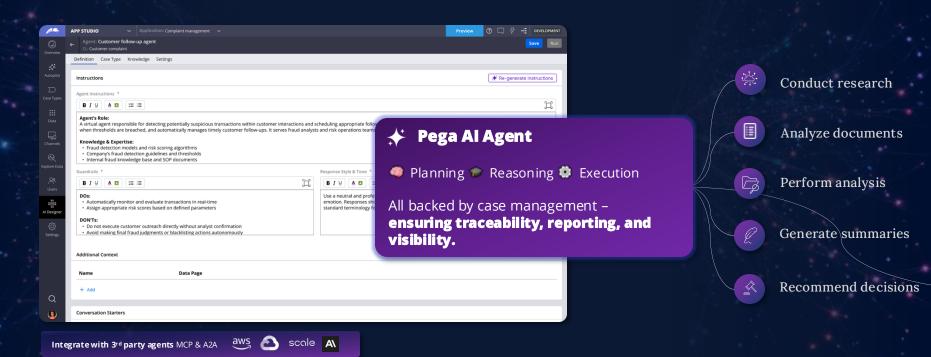
fuel Agent Experiences with

- What data needs to be collected
- What validations need to be done
- What **business rules** needs to be run
- What systems need to be updated
- Where work should be routed
- How urgency & SLAs should be managed



## Fully autonomous agentic automation

Pega Task Agent Performs the Work



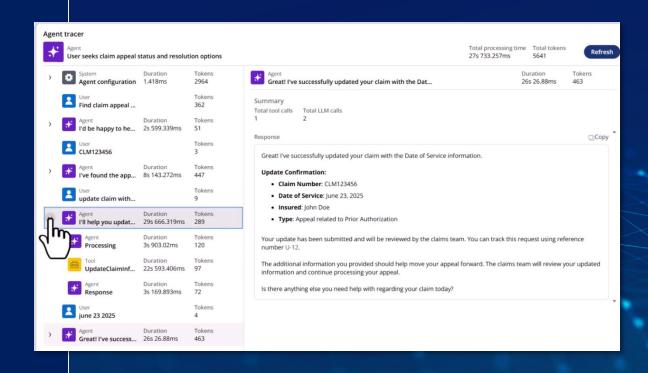


## Monitor & Audit Agentic AI

#### PEGA PREDICTABLE AI™ AGENT TRACER

Ensure Al agents are behaving well at scale.

Track, audit **agents**, troubleshoot, & report on agent interactions across the operation.





## Pega Knowledge Buddy

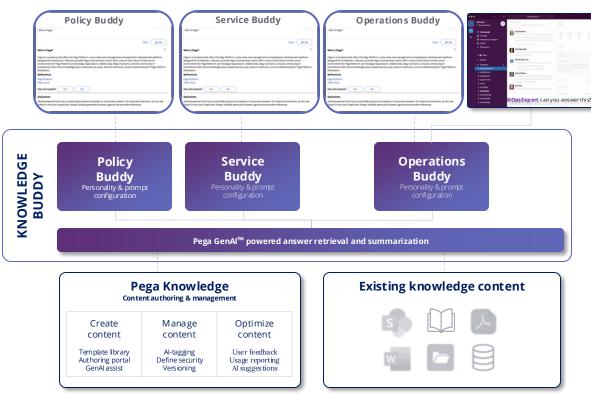
By Cord Cantrelle.





## Bring your knowledge to where your users are

Quickly point Knowledge Buddy at the documents, web pages, and content to import Then plug Knowledge Buddy into your existing user apps, chat, and channels



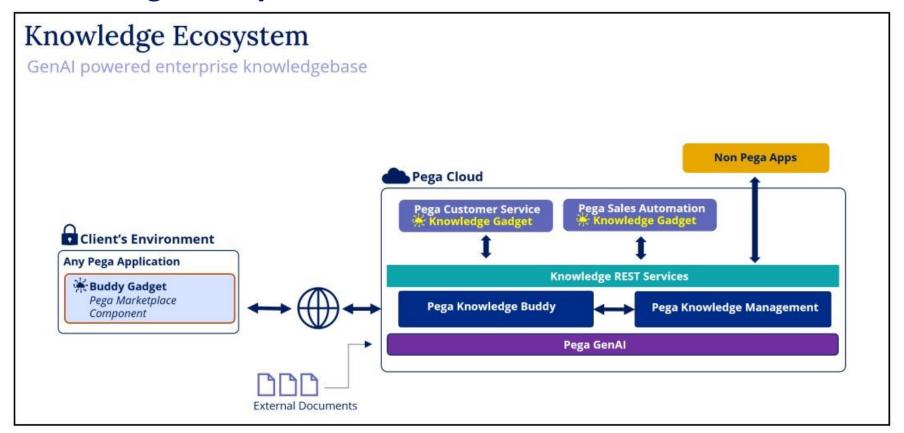
Plug into existing customer & employee channels

Quickly configure & test Alpowered assistants

**Get instant Al powered answers** 

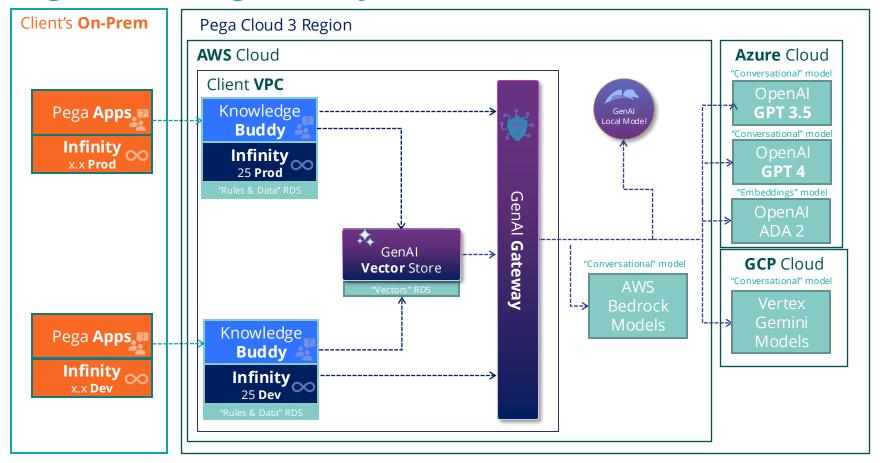
Import your existing content

## Knowledge Buddy Architecture





## Pega Knowledge Buddy™ Architecture





## **LLM Models Supported**

Pega Version	LLM infrastructure	LLM	LLM versions*
'24.1	Microsoft Azure Open AI	GPT 3.5 (default)	<ul><li>Current: gpt-35-turbo-1106</li><li>Next: gpt-35-turbo-1106</li></ul>
'24.2	Microsoft Azure Open AI	GPT 3.5	<ul><li>Current: gpt-35-turbo-1106</li><li>Next: gpt-35-turbo-1106</li></ul>
	Microsoft Azure Open AI	GPT 4o mini (default)	<ul><li>Current: gpt-4o-mini-2024-07-18</li><li>Next: gpt-4o-mini-2024-07-18</li></ul>
	Microsoft Azure Open AI	GPT 40 mini (default)	<ul> <li>Current: gpt-4o-mini-2024-07-18</li> <li>Next: gpt-4o-mini-2024-07-18</li> <li>Deprecated: gpt-4o-mini-2024-07-18</li> </ul>
	AWS Bedrock	Anthropic Claude 3 Haiku	Deprecated Spt 10 mm 2021 of 10
	Google Vertex	Gemini Flash 1.5	
'25.1	AWS Bedrock	Anthropic Claude 3 Haiku	
	Google Vertex	Gemini Flash 1.5	
	Microsoft Azure Open AI	GPT 40 mini	



## Credit Union

## Transforming Knowledge Access: A Leap in User Experience and Efficiency

#### **Background**

- This credit union is one of the United States Premier Credit Unions with over 500,000 members
- The credit union sought a solution to transform agent interactions with organizational knowledge

#### The Challenge

- Manual search methods resulted in inefficiencies, slowing down workflows, and affecting overall productivity.
- The credit union was looking for an intelligent, responsive system that ensures rapid, high-satisfaction user experiences

#### The Solution

- Partnered with Pega to implement Pega Knowledge Buddy (KB), a Gen AI-powered tool designed to assist in the fast and intelligent retrieval of knowledge across the organization
- Achieved immediate value with an 80.29% overall satisfaction rate
- Standardized information delivery across teams, which improved alignment with contact center goals





## US Insurance Company

## Transforming Agent Efficiency with AI-powered answers

#### **Background**

- With over 100 years of service, this insurance company offers a wide variety of products, including workers compensation insurance, liability insurance, building insurance and more
- The company wanted a solution that would elevate customer service and drive efficiency

#### The Challenge

- Agents spent too much time trying to find the right answer
- Answers were inconsistent, and agents were becoming frustrated



#### The Solution

- Partnered with Pega to implement Pega Knowledge Buddy (KB), a Gen AI-powered tool designed to assist in the fast and intelligent retrieval of knowledge across the organization
- Received value within four weeks
- Reduction in search time boosted productivity



## Constellation vs. Traditional• UI

Pega Infinity User Experience Approach

By Anthony Leonardi.



## Traditional to Constellation: A Shift in Approach



## Customization

"Build any UI you want, from the ground up, by branching code"



## Configuration

"Build a modern, powerful UI that exemplifies great UX and drives business results.

And do it with a prescriptive presentation, powered by flexible orchestration."



## Prescribed presentation + Flexible orchestration

#### **Constellation** Design System

- Library of cohesive UI templates, patterns and software components
- Contains prescribed navigation, workflows, and information architecture
- Enables teams to deliver Pega application experiences consistently and efficiently

#### **Constellation Architecture**

- Low-code, easy, consistent and error-proof configurability in App Studio
- Modern web-standard (React, Redux, Node.js)
- Better separation of concerns for easier maintenance and upgrading
- An open, API-based, industry-leading architecture that allows front-end developers to both extend and, in some cases, replace the front-end experience.



## **Traditional vs. Constellation Key Differences**

	Constellation UI	Traditional UI
UI Architecture	View based	Section based
DX API	Constellation DX API (V2)	Traditional DX API (V1)
API Calls	Stateless*	Stateful¤
Customization	Prescriptive	Extensive
Development environment	App Studio	App/Dev Studio

<sup>&</sup>lt;sup>n</sup> The server must keep track of the current state of the client's session, including all information necessary to identify the client and its current form.

<sup>\*</sup> API calls can be made independently of one another, and each call contains all of the data necessary to complete itself successfully. **Stateless UI's are <u>faster</u> and more extensible.** 



## **Pega Infinity Constellation Modern Architecture**

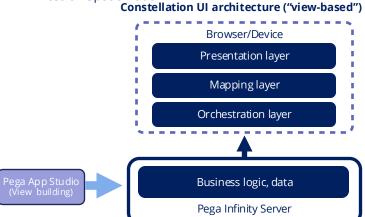
## **Traditional architecture**No Code building blocks built in Dev Studio

- Pros
  - Well, you can do anything you want!
- Cons
  - More dev work & rule maintenance
  - Harder upgrades, specialized rules
  - Slower performance
  - Inconsistent UX patterns, spacing
  - More difficult to learn
  - More difficult to pick up others dev work

# Pega Dev Studio (section building) Pega Infinity Server

## Constellation modern architecture Configure components that build blocks for you

- Pros
  - Ouicker time to value
  - Massive Upgrade Improvements
  - End User Productivity based on proven UX patterns
  - Accessibility improvements built in
  - Consistency increases learnability, less training, more resources
  - Easier to continue others configuration work
  - Flexibility with alternate design system support through SDKs
- Cons
  - Less UX Specialization





## Why Pega Infinity Constellation











Faster to build

Give your authors an outcomebased authoring experience that's accelerates the pace of change for your applications **Easier to Learn** 

Learning Pega Infinity Constellation doesn't require knowing deep UX constructs, and learning is Pega GenAl assisted **More Flexible** 

Seamlessly plug workflows into your existing employee & customer front-ends with lower effort & TCO. **Easier to Brand** 

Deploy employee-facing apps which adopt your brand in just a few clicks. Accessibility First

Develop workflows & UX with built-in accessibility and responsiveness.

Business, IT, & design collaboration on outcomes



## **Pega Infinity User Experience**

Preparing for Pega Infinity Constellation



## Where can I learn more Videos, Training and Documentation

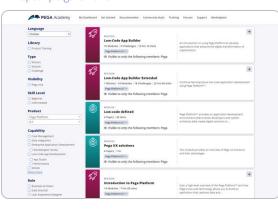
#### **Pega Community Video Library**

https://pe.ga/48eOoQV



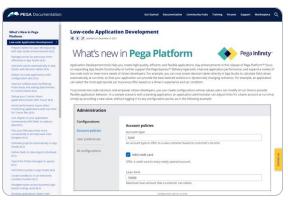
#### **Pega Academy Training**

https://pe.ga/3PdXOnf



#### **Pega Documentation**

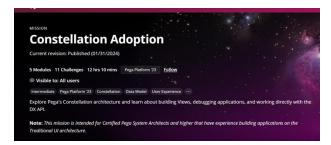
https://pe.ga/39N4HL2





## Preparation for Constellation Adoption

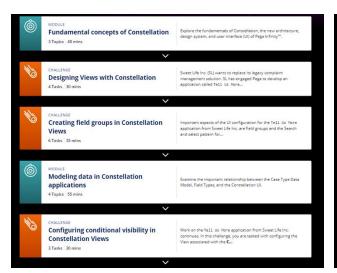
#### Key Pega Academy Course on Adoption

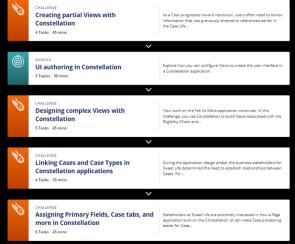


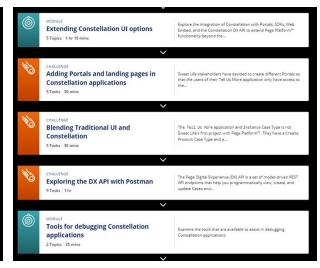
#### **Pega Infinity Constellation Adoption Course**

This course is key to your success in learning Pega Infinity Constellation

https://academy.pega.com/mission/constellation-adoption/v1









## Preparation for Constellation Adoption

#### Key Pega Knowledge Articles

#### **NEXT Steps: Recommended Academy Courses**

Low-Code App Builder & Low-Code App Builder Extended

https://academy.pega.com/mission/low-code-app-builder/v6
https://academy.pega.com/mission/low-code-app-builder-extended/v6

#### **Key Documentation Articles**

- Changes and limitations: some notes on how things changed https://docs.pega.com/bundle/platform-23/page/platform/user-experience/constellation-limitations.html
- Working with Views: why do I need those?
   <a href="https://docs.pega.com/bundle/platform/page/platform/user-experience/working-views.html">https://docs.pega.com/bundle/platform/page/platform/user-experience/working-views.html</a>
- Configuring Views: overview of how we populate Views (more details in child articles)

  https://docs.pega.com/bundle/platform/page/platform/user-experience/configuring-views.html
- Goodbye to Action Sets

https://community.pega.com/blog/goodbye-action-sets-cosmos-react-yes-good-reason

Data Pages in Constellation

https://docs.pega.com/bundle/platform-88/page/platform/data-integration/data-pages-constellation.html

Taxonomy: which UX bit is which?

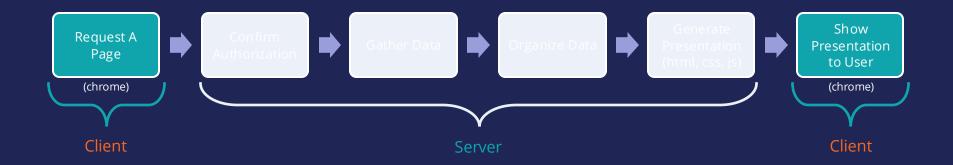
https://docs.pega.com/bundle/platform/page/platform/user-experience/constellation-taxonomy.html



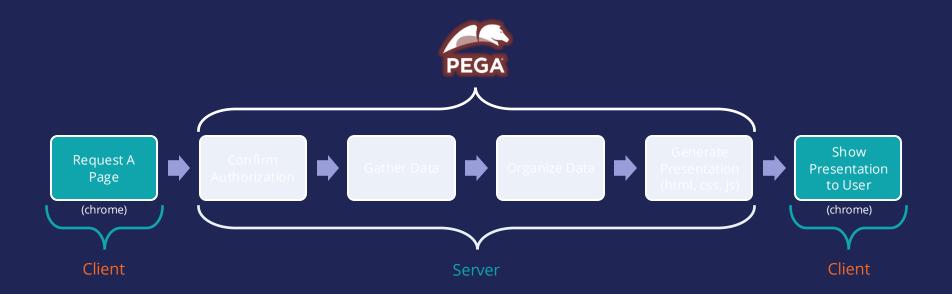
## **Traditional** → **Constellation**

Architecture Crash Course

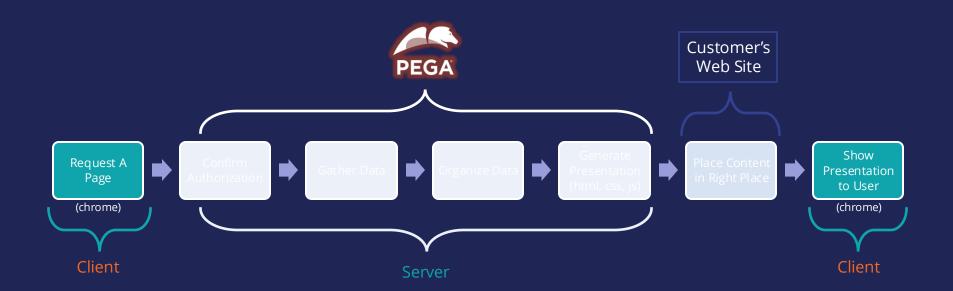






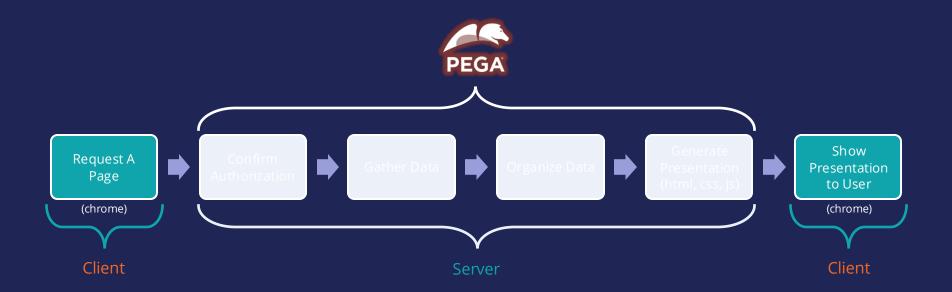




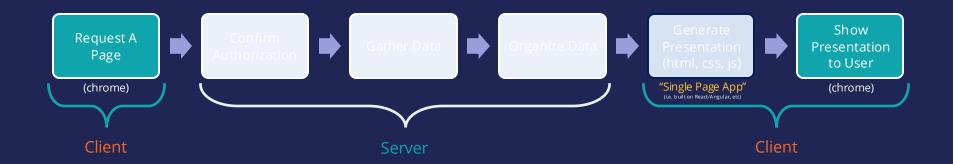


Web Mashup (iFrame)

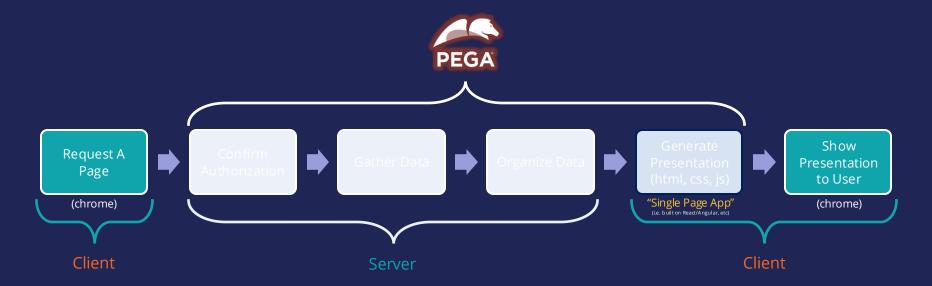




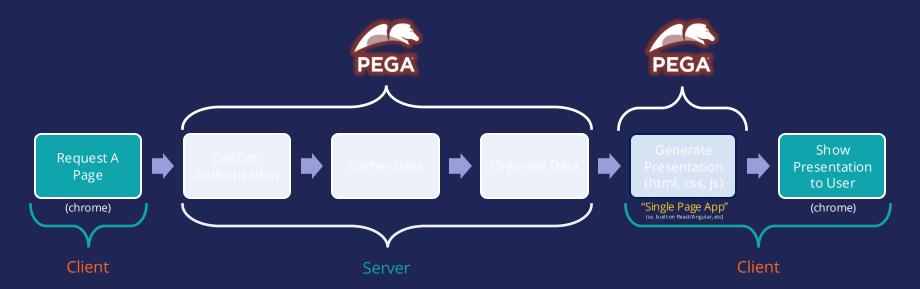




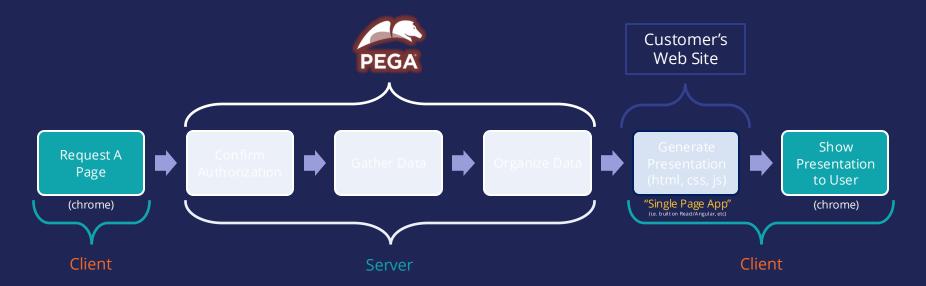




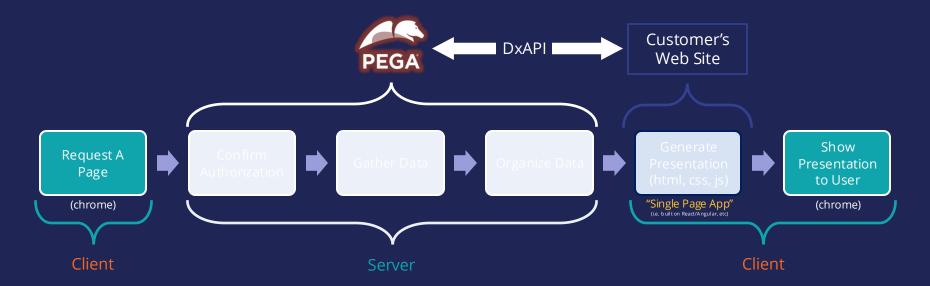




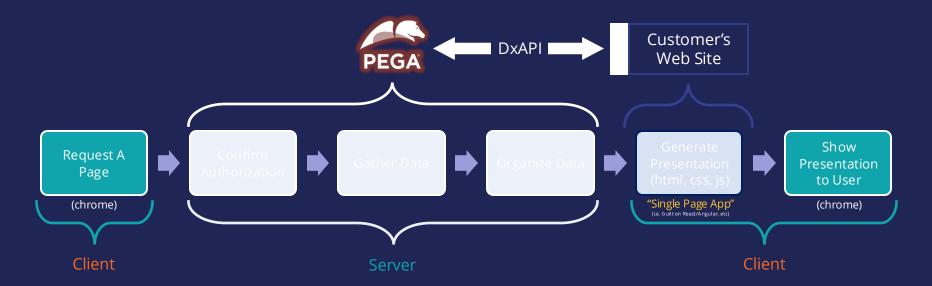






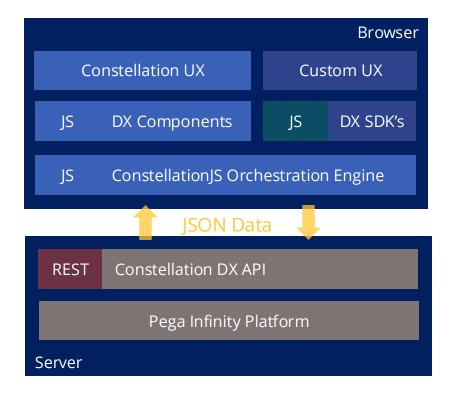








#### **The Constellation stack**





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