

Pega® Sales Automation for Financial Services

Bust quotas with artificial intelligence

A Pega Sales Automation Datasheet

Uncover hidden revenue. Drive faster deal progression. Sell smarter.

Traditional sales force automation systems have failed to deliver insights to salespeople, to augment their knowledge, and make them more productive. In fact, many argue they're nothing more than a burden, dragging on precious time. The result: More than fifty percent of sales reps still don't make quota each year, and managers don't know why, and don't know how to help.

With Pega® Sales Automation for Financial Services you get built-in artificial intelligence (AI) and insights that direct sellers with real-time offers, suggested actions, content, and valuable insights on how to build and progress pipeline across retail, small and medium enterprise and commercial accounts.

Bust quotas

- Identify the best leads, opportunities, actions, content, and offers for each rep.
- Generate insights into how to progress the deal faster to the next stage.

Sell smarter

- Generate offers and content that is relevant and contextual to the contact and account.
- Identify which reps are struggling and the best recovery actions.
- Predict forecast accuracy and which actions will deliver revenue.

Simplify sales

- Give sellers and managers real-time views into predicted length of sales cycle, quota attainment, lead quality, and which reps are poised to have the best performance.
- Get a full view of prospect or client activity, and proactively alert busy managers and reps with the best content to send and actions to take.
- Accelerate time to transact with intelligent guided selling that leverages AI.

Challenge

Your traditional sales force automation system is not living up to the promise of helping your reps generate more revenue, or in providing accurate forecasts to management. Why? Because you are reacting to data buried in activity logs and looking at reports that don't isolate problems and deliver coaching in real time.

Solution

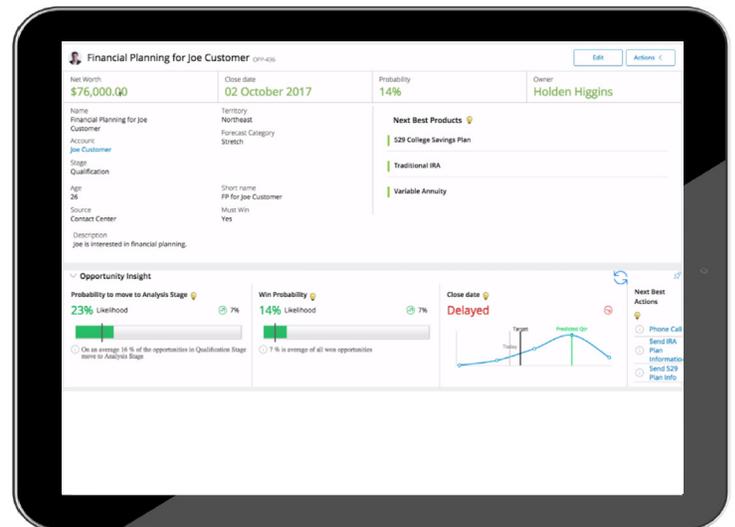
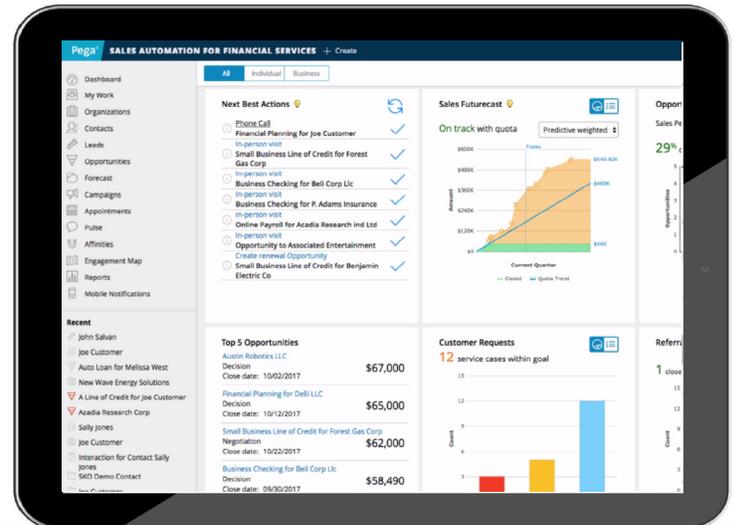
The use of artificial intelligence in sales force automation changes the paradigm of sales and sales coaching from reactive to proactive, and from instinct-driven to insight and data-driven. Pega's AI constantly learns from what works, what doesn't work, and self-optimizes so that guidance to reps, agents, and managers continually improves.

Intelligently guide sales teams

By blending predictive analytics with configurable business rules, Pega recommends the next best action to take, offer to make, and proactively drives these insights to sales reps and agents across each step of the sales cycle.

- Guided and self-learning sales processes** – In one environment, Pega is uniquely able to configure sales processes to handle multiple sales teams (inside sales, external sales, partner sales) and across business-to-consumer and business-to-business sales. Each seller has his or her own dashboard and is prompted to move to the next sales step, or to execute on the next sales activity, based on a guided sales model. The AI engine gathers insights from these steps and applies analytics to optimize future guided sales steps.
- Next best actions are identified for each lead and opportunity** – Pega uses AI to present the next best action at the right moment in time. These actions can relate to the steps to qualify leads, progress pipeline, nurture with content, or other activities to drive lead and opportunity qualification and closure.
- Next best offers drive new and repurchase sales** – At the heart of the system is the Pega® Customer Decision Hub. This digital brain is constantly evaluating representative activities and client/prospect activities across channels to determine the next best offer. Sales people no longer have to guess at bundles, or cold call to generate new leads or sales. Instead, Pega® Sales Automation and the Customer Decision Hub work seamlessly together to use customer lifetime value (CLV), win scoring, offer propensity, and other configurable inputs to generate offers.
- A system built to highlight coaching actions** – AI is also used to drive real-time sales coaching insights. The AI engine looks at sales results, sales activities, projected forecast, and other data points that your team deems relevant. Pega Future Cast and rep effectiveness dashboards show managers the estimated quota attainment for the quarter, and recommendations to keep reps on track with meeting their goals.

- Designed for financial services organizations** – Pega Sales Automation for Financial Services delivers out-of-the-box functionality for retail, small business, and corporate bankers, empowering them with guidance to drive revenue, as well as the insights they need to provide customer-focused responses and financial advice. That guidance is displayed in specific, role-based dashboards and processes, thus eliminating non-relevant information for bank representatives. Pega supports account and contact management, with geo-location and householding, as well as branch banking territory reporting and forecasting.



The built in AI guides reps and managers on desktop or mobile devices.