



# Accelerating the AI journey: A Pega Catalyst™ case study

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## Business goals

- Drive largest revenue growth target in the past 10 years.
- Deliver personalized offers based on real-time context and big data insights.
- Operationalize artificial intelligence to respond to dynamic market conditions.
- Improve business and analytics agility with an enhanced data supply chain.

## Results

- Outcomes roadmap with 13 actionable steps.
- Recommendations underway within 60 days.
- More than 300 adaptive models live within two weeks.
- Governance process implemented to improve model data and curation
- More than 90,000 next-best-action recommendations each month.
- Increased average revenue per offer.

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- Millions of customers and prospects
  - More than 600 sales and service CSRs
  - Hundreds of field technicians
  - 100,000 transactions per week
  - Web, contact center, and retail channels
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## Challenge and vision: What did the client want to achieve?

Pega was asked to provide recommendations for how to increase the value realized from an existing implementation of the Pega Customer Decision Hub™. The client needed to identify causes leading to the application underperforming expectations.

There were a number of opportunities to improve results. First, there was a lack of clear ownership of the application within IT and a corresponding lack of business sponsorship. Second, key business and IT processes weren't optimized. Third, the client did not have a systematic measurement program that captured value realized over time. Fourth, there were opportunities for better data curation and governance. Finally, the most important challenge was how to apply its test and learn culture within the application.

The leadership needed to establish a positive digital and analytics mindset and teach stakeholders how to use the Customer Decision Hub to achieve their business outcomes.

## How Pega helped: The Catalyst solution approach

The Pega Catalyst™ Group led an AI transformation at the client by guiding them through the Pega Catalyst™ engagement methodology – frame, focus, mobilize, and catalyze – over 90 calendar days.

During the frame phase, the Pega Catalyst™ Group discovered the client was not using the available adaptive models with real-time, contextual data to drive next-best-action

recommendations. During the focus phase, the team further refined the problem and opportunity as a lack of real-time and near real-time decisioning capabilities that would increase the relevance and conversion rates of next-best-action offers with an effective and continuous learning feedback loop. Furthermore, in the focus phase the team identified the 11 people, process, and technology outcomes required to realize meaningful business value. The journey to success was subsequently depicted in a business outcomes roadmap.

In the mobilize phase, the group used their design toolkit, rooted in design thinking, to create a prototype that illustrated the ideal solution. During the catalyze phase, the group created and presented the plan to achieve all of the client's business goals. The plan included 35 business and technical recommendations that would operationalize and scale the application as desired. The implementation of the recommendations was led by Pega's Customer Success Manager (CSM) who worked onsite with the client to achieve the desired outcomes. The CSM prioritized the work and provided thought leadership and analytics subject matter expertise to enable transformation.

During the engagement, the Pega Catalyst™ Group was completely immersed in the client's day-to-day operating environment. This immersion was reciprocated by a commitment of time and guidance from each VP and director at the organization. Specifically, the group met with 22 stakeholders in more than 40 interactions over the 90-day engagement. In each interaction, the content of the conversation was transparent, direct, and focused on the business outcomes.

## Outcome: Enabling real AI with the Pega Customer Decision Hub™

The client's awareness and understanding of analytics, decisioning, and the Pega Customer Decision Hub™ increased dramatically during and after the engagement. The increased trust and ownership of analytics led the client to turn on more than 300 adaptive models that influenced at least 93,000 decisions per month in the two weeks following the engagement. In addition, the client has fundamentally changed how they manage the people, process, and technology that delivers AI outcomes including how they use data and customer insights to offer relevant next-best-action recommendations.

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