



# INCREASE CUSTOMER SATISFACTION AND QUALITY BY SIMPLIFYING THE DESKTOP



## A PEGA® ROBOTIC AUTOMATION CASE STUDY\*

### Business Goals

- Enhance customer experience
- Decrease total call handle time
- Improve CSR Quality Assurance scores
- Increase up-sell and cross-sell opportunities

### Results

- 40% improvement in AHT
- Overall AHT decreased from 3:30 to 2:54
- QA scores improved from 94% to 96%
- Customer scores increased from 91% to 99%

A leading North American business process outsourcing provider that helps world-class organizations optimize their operations through strategic marketing and business intelligence. They provide robust customer care services to support millions of reward cards that it fulfills annually on behalf of its blue-chip client roster. The center handles over three million calls annually.



“*The Pega Robotic Automation solution provides great options for the front end dashboard display to agents and allows other applications to run in the background. This allows agents even more focus on the tasks at hand and the customer on the phone!*”

**BPO, Director of Customer Care**

## Vision: Bridge Disparate Systems and Enhance the Customer Experience

Agents were using disparate applications and websites from its clients, partners, and internal systems, resulting in reps often needing to complete manual processes and redundant steps when serving callers. Reps sometimes were required to focus more on system navigation—taking focus away from the customer experience and interaction. Multiple systems also posed a risk factor that potentially could impact accuracy. Agents did not have a consolidated view of customer data to efficiently respond to inquiries or service requests. “We realized we needed a way to bridge the disparate systems and enhance the customer experience,” commented the director of customer care. “In order to keep our leadership position and better serve our customers, a change was in order.”

## Execution: First Live Implementation in Less than Ten Weeks

The first automations took just three weeks to build, and after a short testing period, were deployed to the production teams. The company rolled the solution out one team at a time, paralleling with untrained agents on the use of both the new and old ways of doing business. The Pega® Robotic Automation\* solution was easily adapted to its various applications and websites, both internal and client or supplier owned. The solution building effort was flexible and allowed the development team to experiment and find just the right sequence of interrogations to pull or plot the most useful data for agents, providing a more comprehensive view with

the right information at the right time. Pega’s support teams provided onsite help during the initial deployment as part of its enablement model. This allowed its development team to receive firsthand guidance and mentoring as well as tips for building future solutions.

## Outcome: Pega® Robotic Automation Solutions Improved AHT and Customer Satisfaction Scores

The company able to reduce new agent training by a full 1.5 days for new hires, with transitional ramp-up time to achieve key metrics dropping by almost 25%. It has already begun to expand Pega® Robotic Automation use to other major client contact centers. To date, it has built more than 30 automations for agent desktops—and has plans for another dozen within the next six months. Pega’s agile development has also become the standard methodology for addressing smaller projects—streamlining details and providing an aggregated 360° customer view that includes intelligent guidance to the agent for more effective up-sell opportunities. With continued progress, the center envisions expanding Pega’s use into other departments such as client services and accounting. The company continues to hold focus groups to enhance ease of use and identify new automation opportunities.

\*Formerly OpenSpan robotic automation



## ABOUT PEGASYSTEMS

Pegasystems Inc. (NASDAQ: PEGA) develops strategic applications for marketing, sales, service, and operations. Pega’s applications streamline critical business operations, connect enterprises to their customers seamlessly in real-time across channels, and adapt to meet rapidly changing requirements. Pega’s Global 3000 customers include many of the world’s most sophisticated and successful enterprises. Pega’s applications, available in the cloud or on-premises, are built on its unified Pega® 7 Platform, which uses visual tools to easily extend and change applications to meet clients’ strategic business needs. Pega’s clients report that Pega® software gives them the fastest time to value, extremely rapid deployment, efficient re-use, and global scale. For more information, please visit us at [www.pegasystems.com](http://www.pegasystems.com).

