



PEGA EXTENDER FOR SALESFORCE.COM

Extending Salesforce.com with Pega Dynamic Case Management

A PEGA PLATFORM DATASHEET

Reap the Combined Value of Pega and SFDC

SFDC case management tools can include the participants, data, task lists, and content associated with a case. But that's not enough to maximize work efficiency and effectiveness. Introducing new products, selling them competitively, delighting customers, and adhering to time or regulatory constraints; all of these activities require context, bridging multiple functions, teams, geographies, and systems.

Pega Process Extender for SFDC addresses this challenge by allowing you to work holistically and in context. Leveraging Pega Dynamic Case Management, Process Extender captures and executes requests, processes, and changes in a dynamic layer that provides visibility and action across the entire spectrum of constituents and systems.

Pega uses business objectives to drive case actions and decisions, which can be made automatically or by the parties working a case. Every decision advances the case towards its ultimate objectives: increasing customer value and loyalty by cross-selling new products, delivering quick and excellent service, and resolving issues and changes as quickly and easily as possible.

- **Manage the Process from Start to Finish**
Holistic case management orchestrates people, processes, and data, making it easy to get work done across multiple constituents, geographies, and systems.
- **Rapidly Integrate with SFDC**
Pre-built, standards-based integration lets you quickly leverage Pega Dynamic Case Management within your SFDC environment.
- **Integrate Channel Interactions to Ensure Best Customer Outcomes**
Dynamic Case Management oversees cases across all channels—including phone, the web, social media, and mobile devices—without any loss of context.
- **Easily Scale to Match Business Growth**
Enterprise-scale integration provides secure and compliant processes and data storage on-premise or in the cloud.

CHALLENGE

Businesses need to handle marketing, sales, and service activities comprehensively, responding not just with customer-facing activities and tasks, but with a range of responses throughout the organization.

Most businesses rely on people to understand the context of a case, remember all the applications that perform different aspects of the work, and “hand stitch” everything together for every situation. When unforeseen situations arise, exceptions that can't be handled by existing policies and processes pile up. The result is inconsistency, missed opportunities, poor customer satisfaction, and slower growth.

SOLUTION

Pega Process Extender for Salesforce.com (SFDC) augments SFDC functionality with secure, enterprise-scale, dynamic case management that delivers end-to-end process integration.

By bringing Pega and SFDC together, Pega offers a robust solution to help organizations get new products to market faster, market and sell more effectively, and deliver excellent customer service.

By leveraging Pega's leading end-to-end case management, intelligent BPM, and CRM technologies, organizations using SFDC to track sales activities can help further their businesses' growth.

Streamline Work from End-to-End

- A comprehensive view of client interactions delivers a real-time, high-definition view of customers for better service, growth, and retention.
- Integrated social, mobile, and cloud capabilities support smart and responsive customer service across every channel.

Integrate Easily with SFDC

- Pega complements SFDC functionality with model-driven development for process design and decision management.
- Easy SFDC installation creates tabs and links for cases, dashboards, reports, and more.
- Automatic authentication and single sign-on make using Pega with SFDC fast and easy.
- Web services automatically update Pega and SFDC with changes in opportunities, cases, and fulfillment details.
- Easy to extend for predictive decision management and coordinated customer service interactions.

Meet Enterprise IT Requirements

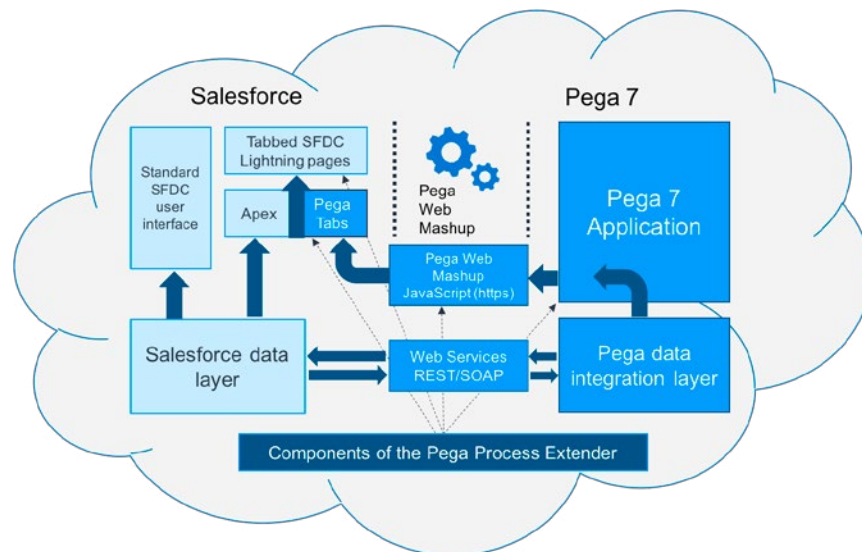
- High-performance data mapping and transformation.
- Delivers a HIPAA, PCI DSS, EU 95/46/EC, and FDA CFR Part 11 compliant environment.
- Secure (based on WS-Security) connectivity, including encryption, authentication, time stamps, and digital signatures.
- Standards support for easy connection and control.

Gain Outstanding Performance and Ease-of-Use

- Use pre-built, case-based solutions for onboarding, customer service, compliance, and investigation.
- Handle regional and product variations with ease using Pega's process specialization.
- Case managers and case workers define and extend case types, outcomes, decisions, and metrics without the need for any programming.

Ready to get started? Visit us at the Pega Exchange:

www.pegacom.com/communities/exchange



Organizations can now leverage data and extend processes in SFDC using Pega's market-leading Dynamic Case Management solutions to bring new products to market faster and better serve customers.