



Up, Up, and Away: Unleashing the Superpowers of Pega Infinity™

Florian Binder, Principal Solutions Consultant,
Florian Wolf, & **Sebastian Hillig**, Senior Solutions Consultants, Pegasystems





DX HERO™





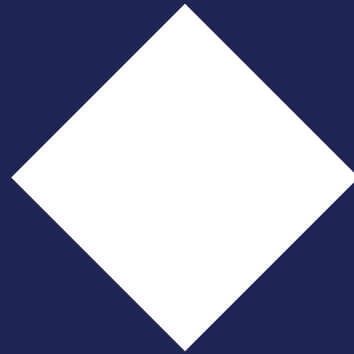








CUSTOMER
ENGAGEMENT



INTERNAL
AUTOMATION

Pega Infinity™

CUSTOMER
ENGAGEMENT

FORRESTER

February 2019



Gartner

December 2018



DIGITAL PROCESS
AUTOMATION

Pega Infinity™

Kelly Wheeler
OWNER

CONTACT INFORMATION

Email kelly.wheeler@example.com

CUSTOMER SUMMARY

Open cases 0

RELATIONSHIP

Churn risk Low

Positive • Category: Auto quote [Hide analysis](#)

Insurance quote bill of sale attached
Wheeler, Kelly (kelly.wheeler@example.com) to: upluscares@example.com
June 02, 2018 03:19PM

I need to add a vehicle to my policy 109186 as of 06/02/2018 can you send over a quote? I purchased a used Honda Civic See attached BOS and below for more details on this change.

2014 Honda Civic VIN # 1HGBH41JXMN109 Mileage 56,287

Also, can you give me an update on when my policy renews? I'm interested in perhaps changing my coverage.
I really appreciate how responsive you have been in all this!

Attachments

Motor_Vehicle_Bill_of_Sale.docx
Open

Analysis

Entities
10 entites

Customer
Kelly Wheeler

Attachment: Motor_Vehicle_Bill_of_Sale.docx

Sentiment Neutral (0.13) Category Action > Proof of Insurance

- Entities
- #Model= Civic
- #Mileage= 56,287
- #Date= 06/02/2018
- #AccountNumber= 109186
- #Year= 2014
- #VIN= 1HGBH41JXMN109
- #Make= Honda

“... automatically triaging
tens of thousands of emails”

NEWS

NAB sets software bots loose on its email avalanche

By Ry Crozier
Mar 21 2019
12:30PM

3 Comments



RELATED ARTICLES

NAB scales up next
best conversation to
3500 bankers

NAB pushes fast alpha
of its new CRM hard to
move off Siebel,
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NAB commits to
massive CRM
transformation

NAB's shift to digital
gets personal

Automatically extracting action items
in 70 percent of cases.

NAB has let 19 “email listeners” loose in eight of its
business units since July last year, automatically triaging
tens of thousands of emails in a bid to improve customer
service.

The bank is one of the first adopters in the world of Pega
Intelligent Virtual Assistant (IVA) software, which is
pitched as a bot that can “read, route, and respond to
email”.

IVA is considered the “star” of the NAB Universal
Workflow or NUW, which is essentially a framework of
reusable components that units and teams from across the
bank can use to digitise processes to improve customer
service.

Pega IVA uses natural language processing (NLP) to pull
the action item out of emails and then direct it to the right
place within the bank.

HAND'S
BEST FRIEND

“34,000 emails... have already
been passed through”

“... 75 percent auto
classification rate”



“... automatically triaging
tens of thousands of emails”

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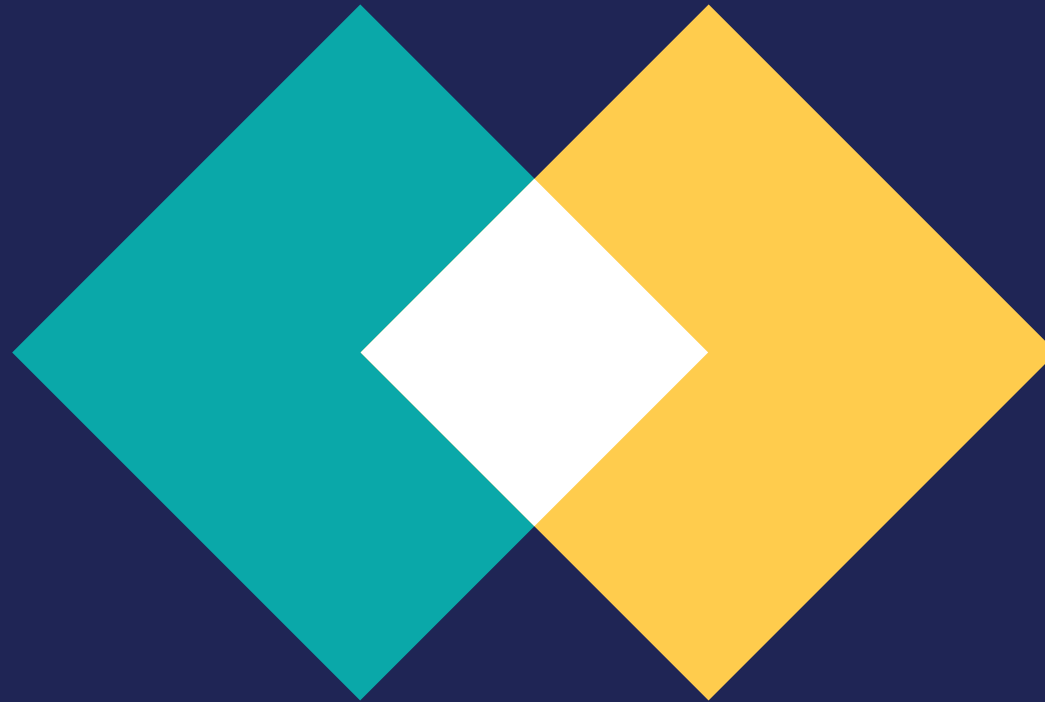


U+ Bank Benachrichtigung ✕

Herzlichen Glückwunsch! Ihr Darlehen
wurde freigegeben...

75 percent auto
classification rate”

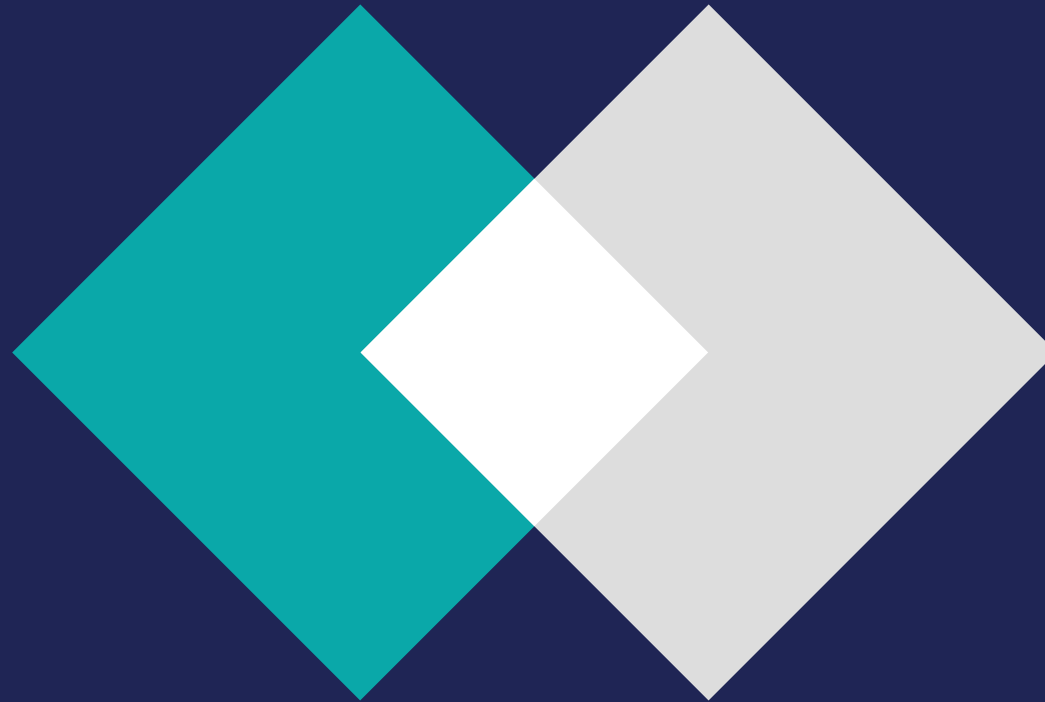
**CUSTOMER
ENGAGEMENT**



**DIGITAL PROCESS
AUTOMATION**

Pega Infinity™

CUSTOMER
ENGAGEMENT



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Next Best Action

PEGA Marketing Search... 99 GR

Next-Best-Action Designer

- Taxonomy**
Define business structure and customer states
- Engagement policy**
Define engagement criteria for each group of actions
- Constraints**
Set constraints, contact policy limits, and controls
- Arbitration**
Define AI behaviors and controls
- Channels**
Enable channels and define triggers

Business structure | Upsell / CreditCards Edited 18 days ago by Chetan Buddi Analyst Save Delete Actions

Engagement policy

Group ORs

- Eligibility ?
 - Action is active Select values +
 - and
 - Action not declined in last 30 days Select values + 🗑
 - or
 - Product is not currently owned Select values + 🗑
- Relevancy ? + ⋮
- Suitability ? + ⋮
- Contact policy ? ⚙

Next Best Action

PEGA Marketing Search... 99 GR

Next-Best-Action Designer

- Taxonomy**
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Business structure | **Upsell / CreditCards** | Edited 18 days ago by Chetan Buddi Analyst | [Save](#) | [Delete](#) | [Actions](#)

Business structure

- All groups
- Collections**
 - Pre-Collection
 - Post-Collection
 - Payment Plans
- CreditRisk**
 - Proactive
 - Reactive
- Service**
 - Account
 - Customer
- Upsell**

Upsell / CreditCards

Add engagement policy (advanced)

Next Best Action

PEGA Marketing Search... 99 GR

Next-Best-Action Designer

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Business structure | **Upsell / CreditCards** Edited 18 days ago by Chetan Buddi Analyst Save Delete Actions

Engagement policy

Group ORs

- Eligibility ?
 - Action is active Select values +
 - and
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 - or
 - Product is not currently owned Select values + 🗑️
- Relevancy ? + ⋮
- Suitability ? + ⋮
- Contact policy ? ⚙️



Welcome, Clark Kent!



Frequent Flyer Credit Card

Always flying without a plane? Earn some miles for when you feel like watching a movie while getting there.

[Learn more](#)



2% Cash Back on Capes

Fighting the same bad guy over and over? Don't always wear the same cape.

[Learn more](#)



Great Mortgage Rates for Smallville Homes

Circle of superhero friends growing? Time to upgrade your SuperPad!

[Learn more](#)





Welcome, Diana Prince!



Corral High Interest Rates

Carry another lasso in your pocket.

[Learn more](#)



2% Cash Back on Cuff Bracelets

Too many bracelets? No such thing!

[Learn more](#)

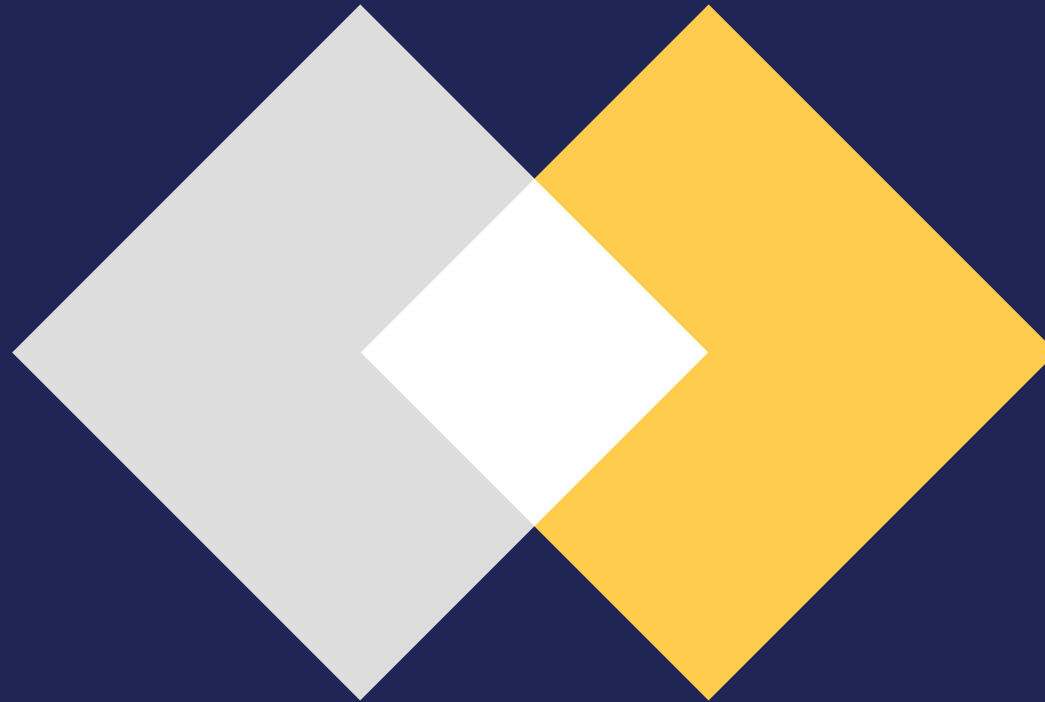


Great Mortgage Rates for Amazonian Homes

Why not get an investment property in paradise?

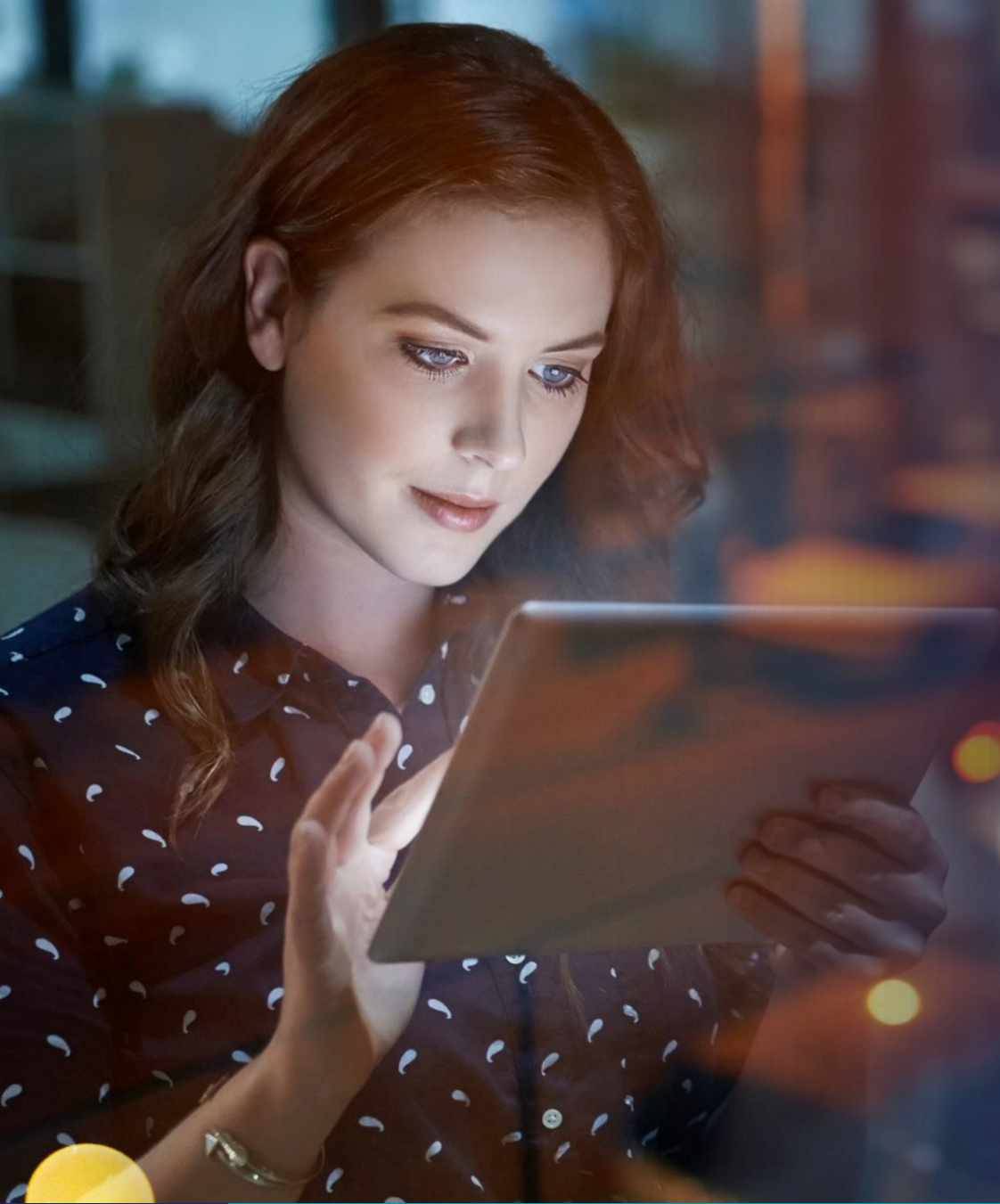
[Learn more](#)





**DIGITAL PROCESS
AUTOMATION**

Pega Infinity™



Employees switch apps
1100x a day.

Source: *Demystifying the desktop*, Pega, September 2018



Robotics



Process



Data



Integration



Logic



AI



People

APP STUDIO | Job Applicant | Data model | Workflow | Views | Settings | Run

Case life cycle

1. Collect Resume	2. Recruiter Review	3. Interview	4. Decision	5. Offer	6. Accepted
Personal Information 1. New Candidate 2. Personal Information 3. Professional History 4. Duplicate Search Cas... + STEP	Phone Screens 1. Phone Screens 2. Next Best Actions + STEP	Manager Interviews 1. Create Interview Cases 2. Wait for Interviews 3. Proceed? CONFIGURE PROCESS	Internal Approval 1. Approve Candidate 2. Applicant File Search 3. Robot Background C... 4. Determine Comp CONFIGURE PROCESS	Approve Offer 1. Approve Offer 2. Send via DocuSign CONFIGURE PROCESS	Start Onboarding Case 1. Send Email 2. Create Case + STEP

Approval Rejection | + ALTERNATE STAGE

+ PROCESS

Life cycle Optional actions

1. Collect Resume 2. Recruiter Review

Personal Information Phone Screens

- 1. New Candidate
- 2. Personal Information
- 3. Professional History
- 4. Duplicate Search Cases

- 1. Phone Screens
- 2. Personality Tests

+ STEP

Reports

Planning Board

Sarah Peterson

Home Search Create Notifications More

Development QA

JA_010101_3 5 Dec 2018 03:11:10

3 branches in queue

Start deployment

You have 2 items to review

- Review payment (exceeds velocity limit)
- New signatory request

Accounts

Account number	Name	Type	Balance
****0000	Disbursement Account	Zero Balance	\$300,150.19
****0100	Operating Account	DDA	\$1,335,000.62
****0300	Customer Payment Account	Sweep	\$43,921.82



Executable rules 350 Case types 30

Guardrails Weighted score 86

Warnings 42 Severe 12

Test coverage Rules covered 70%

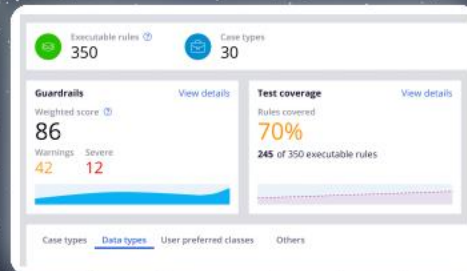
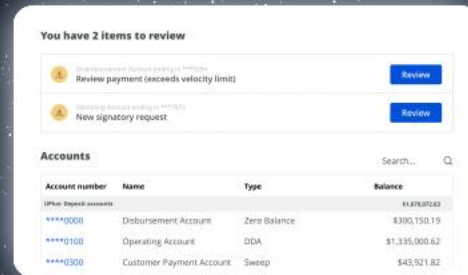
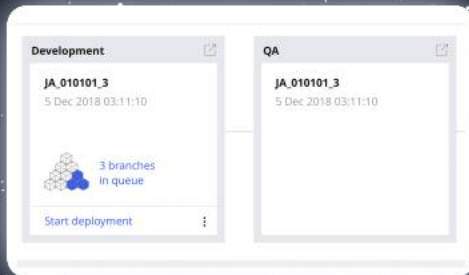
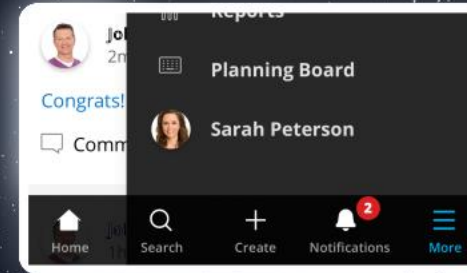
245 of 350 executable rules

Case types Data types User preferred classes Others

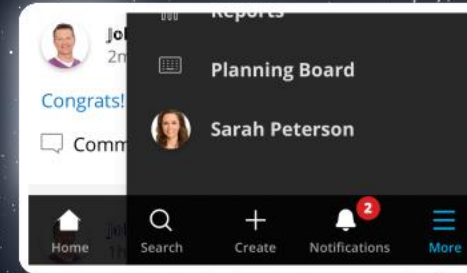
Robot Current activity

- SuperBot-01 Needs attention Working...
- BK-02 Working...
- BK-03 Working...
- SuperBot-02 Standby

App Studio with Case Designer



App Studio with Case Designer



Deployment Manager

You have 2 items to review

- 1 **Review payment (exceeds velocity limit)** [Review](#)
- 1 **New signatory request** [Review](#)

Accounts Search...

Account number	Name	Type	Balance
<i>UPAC - Equity accounts</i>			
****0000	Disbursement Account	Zero Balance	\$300,150.19
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Executable rules: 350 | Case types: 30

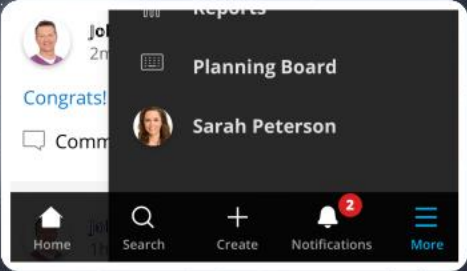
Guardrails [View details](#)
Weighted score: **86**
Warnings: 42 | Severe: 12

Test coverage [View details](#)
Rules covered: **70%**
245 of 350 executable rules

Case types | [Data types](#) | User preferred classes | Others

Robot	Current activity
<input type="checkbox"/> SuperBot-01 Needs attention	Working...
<input type="checkbox"/> BK-02	Working...
<input type="checkbox"/> BK-03	Working...
<input type="checkbox"/> SuperBot-02 Standby	

App Studio with Case Designer •



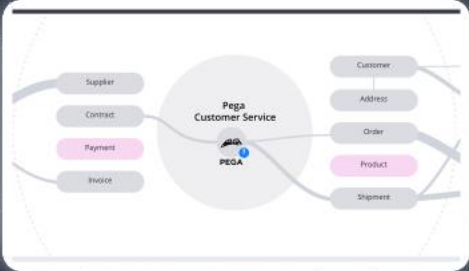
Deployment Manager •

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Accounts Search...

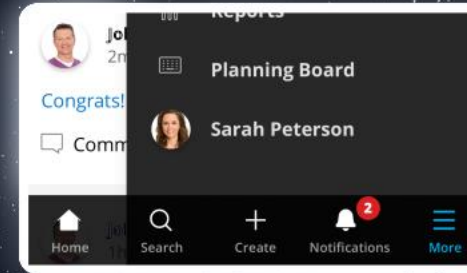
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Quality Dashboard •

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App Studio with Case Designer •



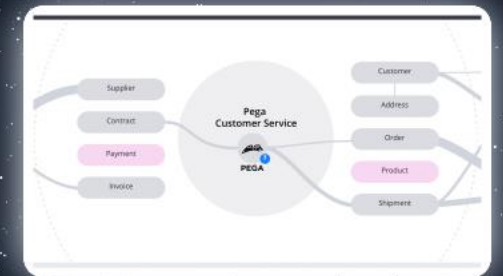
Deployment Manager •

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Accounts Search...

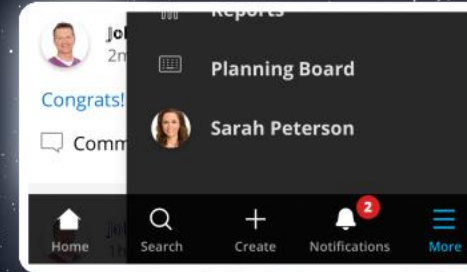
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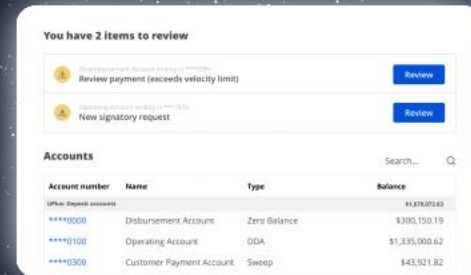
Quality Dashboard •

• Robot Manager

App Studio with Case Designer •



Deployment Manager •



• Integration Designer

Quality Dashboard •

• Robot Manager

App Studio with Case Designer •

• Mobility

Deployment Manager •

The screenshot shows a mobile application interface. At the top, it says "You have 2 items to review". Below this are two items, each with a "Review" button:

- 1. Review payment (exceeds velocity limit)
- 2. New signatory request

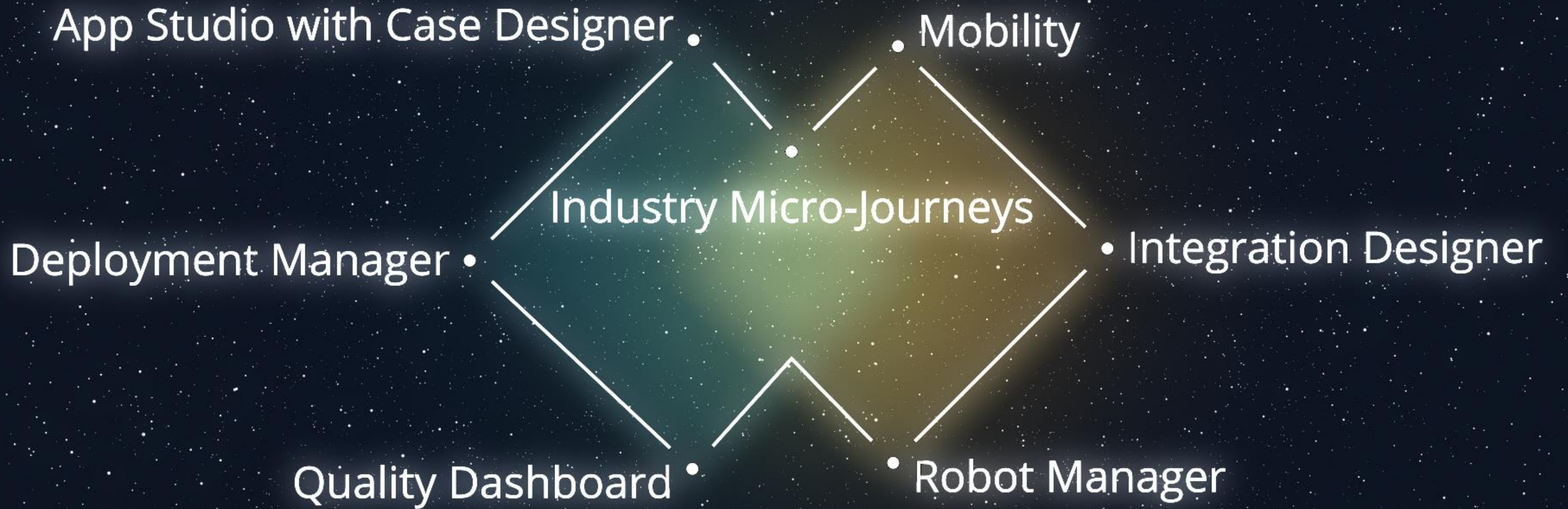
Below the review items is a section titled "Accounts" with a search bar. It contains a table with the following data:

Account number	Name	Type	Balance
UPWA - Regard accounts			
****0000	Disbursement Account	Zero Balance	\$300,150.19
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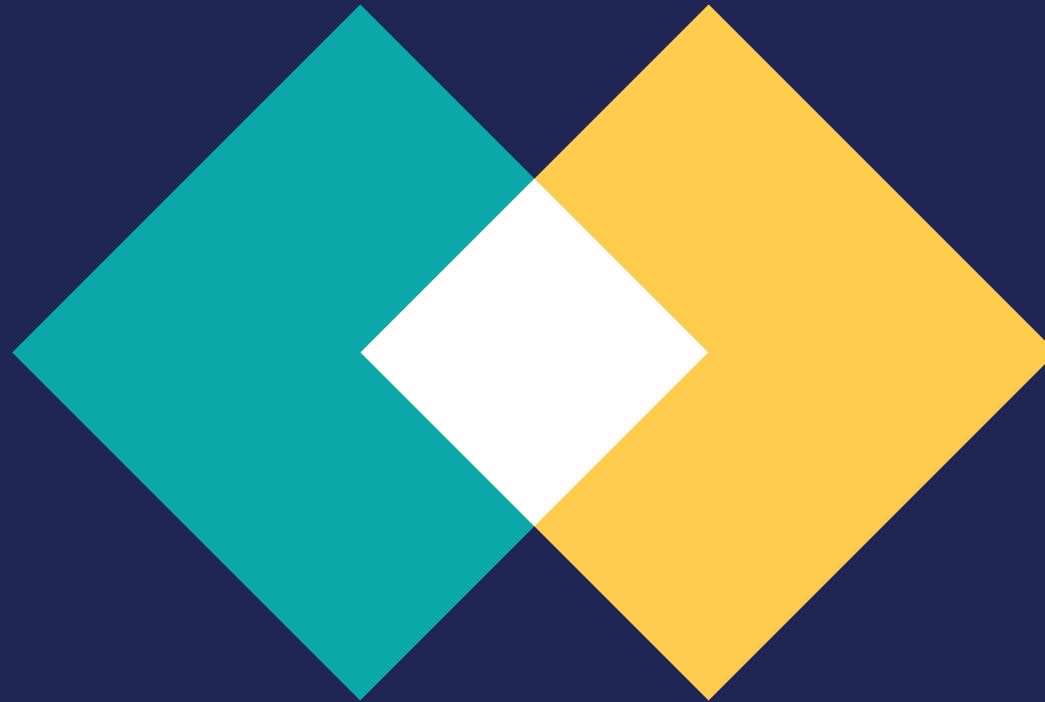
• Integration Designer

Quality Dashboard •

• Robot Manager



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