



PegaWorldiNspire

# Agile customer service in unprecedented times

Jeff Nicholson

Global Head of CRM, Pega



### ⚠️ Travel update

We know that you are concerned about your travel plans. We are experiencing unprecedented call volumes and ask that if you're not traveling within the next 72 hours, please wait to call. If you are traveling between now and April 30th, we have new options to change or cancel your trip online.

[Manage my trip](#)



⚠️ COVID-19 Update: We appreciate your patience as we navigate this unprecedented time. Our customer care teams are hard at work to help you, but wait times are higher than normal. We strongly encourage you to use our digital tools for self-servicing. You can access your accounts online and by using the [App](#). For more information, including Travel support, please visit our [Coronavirus Support page](#). ✕

## Supporting your investing needs – no matter what

We've put together some helpful resources to make it quick and easy to self-serve on our website and mobile apps. If you need to reach us by phone, please understand your wait may be longer than normal due to increased market volatility related to COVID-19.

## Helpful resources

- [Answers to your top questions](#)
- [A letter from our CEO](#)
- [Today's insights on market volatility](#)

sign in or general inquiries (open 24/7):  
1 (877) XXX-XXXX

Estimated wait time

2299:48

Minutes : Seconds

[Request a call back](#)

### Vacations

6 a.m. to 9 p.m. MT-1 (877) XXX-XXXX

Estimated wait time

271:06

Minutes : Seconds

[Request a call back](#)

## We're in this Together.

We're currently receiving higher than normal call volume as we help our customers through this difficult time. We appreciate your patience.

If you have immediate banking needs, please use our [Online and Mobile Banking](#) resources. [Sign in or register for online banking](#).

- Visit our [COVID-19 Resource Center](#) for information and financial hardship relief assistance.
  - Request a [Vehicle or Personal Loan Deferment](#) (Log in and navigate to Contact Us)
  - Request [Mortgage Payment Assistance](#)
- See [Branch information](#)
- Learn how to [Contact Us](#)

To expedite your call, please have your account number ready.

[Close](#)

Our call volumes are higher than usual right now. For faster assistance, consider checking out [comprehensive online FAQs](#). We appreciate your patience.





**YOUR  
TEAM**



**You need to continue to pivot and adapt – quickly.**

You don't have the resources (or time) to waste on another patch-work approach. You need something that's not a throw away.

**Put in place a future-proof strategy now.**



**Even before all of this...**



**80%**

**of customers  
thought service  
took too long**

You're being asked to do it all.  
You're not alone.



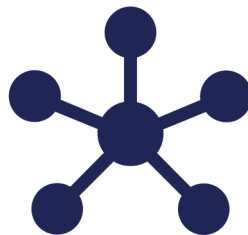
## DEMONSTRATE EMPATHY

Your customers want to be taken care of. **No drama - just resolutions.** Provide proactive, frictionless experiences across any channel.



## SUPPORT AGENTS

Your agents are the backbone to success. Keep your team **connected, effective,** and **productive** wherever they are.



## REDUCE COSTS

Manage costs by reducing handle times, **driving contacts to the most cost-efficient channel,** and proactively and preemptively avoiding service calls.



## PROTECT REVENUE

**Deliver amazing service while you protect revenue** by addressing churn risk and making compelling offers for retention and renewals.

# 1. Demonstrate empathy for your customers

| Customer value  | The experience  |
|--|---|
| <b>“Your company makes it easy for me to get help.”</b>  | <b>Available on any channel</b> , offering 24/7 support via automated contextual engagement and human assistance  |
| <b>“Your company shows that you value my time.”</b>  | Reduce wait times enabled by automated solutions like <b>Pega Email Bot™</b> and <b>intelligent chatbots</b> linked to <b>case management and microjourneys</b> |
| <b>“Your company knows me and shows me that you care.”</b>                                       | <b>Proactive service solutions</b> and custom-tailored offers available across touchpoints, based on your entire relationship with your customers               |



## 2. Support your service employees



### Empower with guided interactions

Task suggestions, dialog recommendations, contextual knowledge, and manager-directed coaching



### Drive collaboration

Engage with managers and colleagues through Pulse, push messages, and Communities



### Monitor and improve productivity

Leverage workforce intelligence analytics and reporting to identify and action productivity improvement opportunities



# 3. Drive down the cost to serve

- **Triage volume while transitioning to lower-cost channels**
  - Extend to digital messaging channels to support concurrent interactions
  - Pega Email Bot™ and contextual self-service
- **Shrink contact duration**
  - Case management and microjourneys
  - Robotic process automation (RPA)
- **Reduce agent interactions**
  - Intelligent virtual assistants and chatbots
  - Proactive and pre-emptive engagement



## 4. Protect revenue with empathetic decisions

Centralized with Pega Customer Service rules engine and Pega Customer Decision Hub



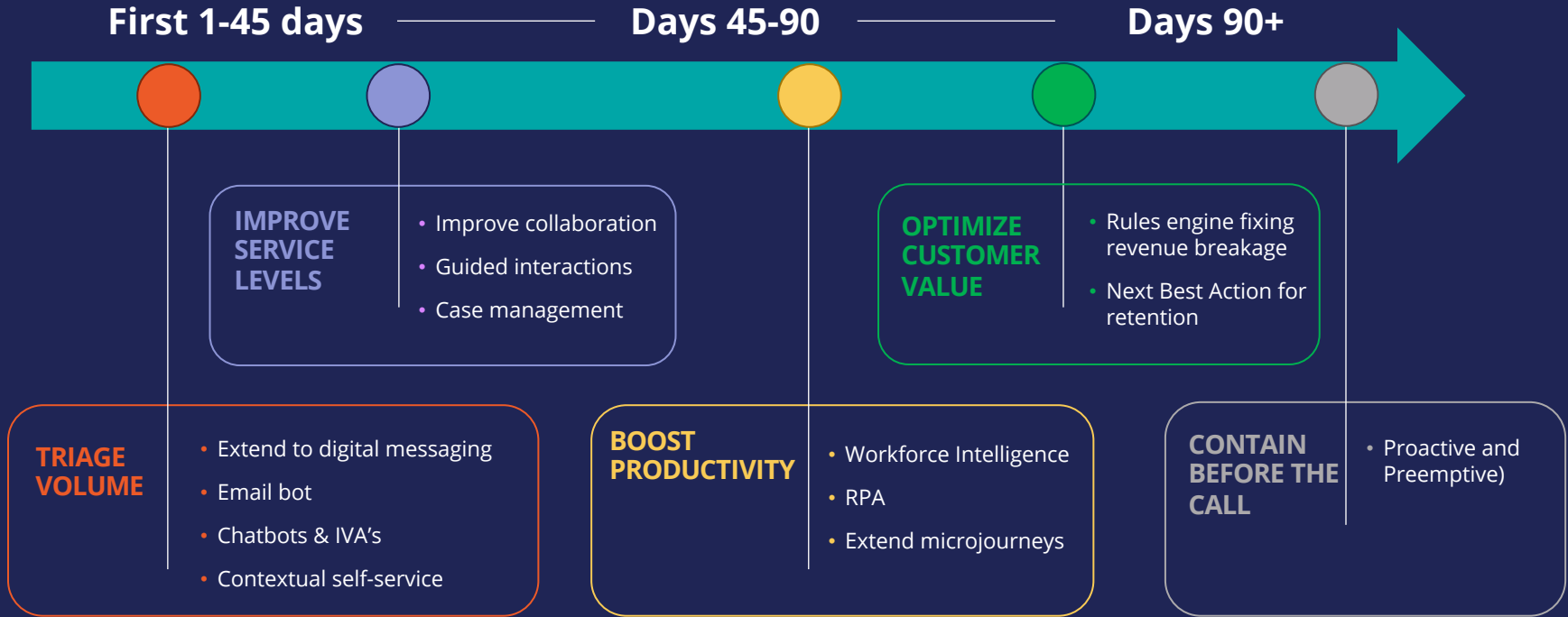
**Identify payment risks**  
*(If relevant to individual via rules engine)*

**Right-size retention offers**  
*(Power Retention Negotiator's LTV-driven offers)*

**Introduce value-added solutions**  
*(Upsell/cross-sell, if offer is relevant and suitable)*

# Actioning your service transformation strategy

Respond to immediate needs while transforming your service strategy for the future



# Pega is with you.

## And we're here to help.



[www.pega.com/service](http://www.pega.com/service)



**PEGA<sup>®</sup>**

Build for Change<sup>®</sup>