



Supercharge your existing
customer service capabilities
with the power of Pega
case management

Extend and reinforce your current investment with Pega

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Take your digital transformation to the next level

Connecting with all of your customers, partners, processes, and products has never been easy, regardless of how advanced you are in your digital transformation journey. Each effort that you've made is a valuable step toward driving optimal engagement across the entire customer journey. This is why your prior customer service investments are so important for your enterprise.

But – as many enterprises have also discovered – taking the next step in scaling a wide array of mission-critical processes, channels, and operations can demand an extra set of critical ingredients. Your customers and partners demand seamless experiences. And to deliver the outcomes that they expect, it's essential to reach new levels of intelligent, seamless front- and back-end processes that improve customer relationships and evolve operations across your enterprise. This is where Pega comes in.

Pega can augment, extend, and reinforce your existing customer service investments to help you deliver real results that provide even greater outcomes. By supercharging with Pega, you can deliver on the promise of truly connected customer engagement across all of your interactions, touchpoints, geographies, business lines, and clouds.

Go beyond the ticket: Connect across silos with end-to-end automation

Many enterprises like yours use Pega to support and reinforce their existing customer service investments. These organizations are able to get even more out of their current deployment by infusing Pega's best-in-class case management capabilities, which scale across sophisticated, multi-dimensional operations that span across all aspects of your business.

“Two-dimensional case management” vs. Pega’s dynamic case management

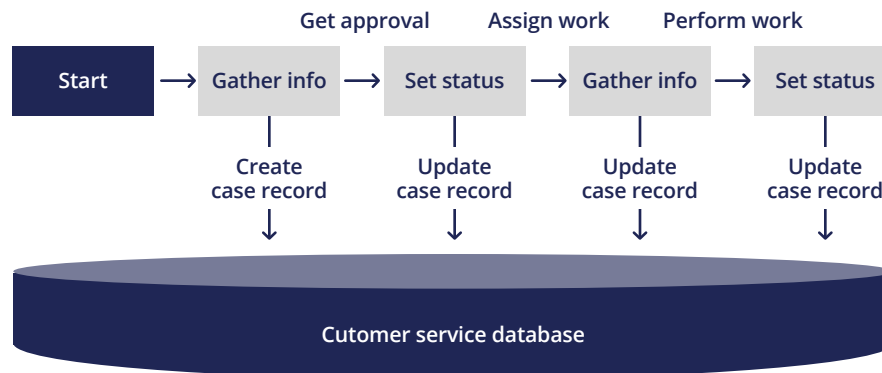
While most customer service offerings include “case management” capabilities, Pega has a different definition and solution for the term “case management.” In many other customer service systems, a typical case refers to your service ticket: a mechanism for routing work across teams and functions. Think of this as a flat, two-dimensional data object that is designed for tracking. While this is important on its own, what is needed is visibility across the entire case as well as the ability to seamlessly automate and execute the actual work (both human and machine-based) that will drive the case to resolution.

Organizations that lack a complete case management solution typically experience many of the following challenges:

- Multiple employees across your organization are **delegated to complete manual work assignments**
- **Incoming work is tracked manually** using point solutions such as Microsoft Access, Microsoft Excel, or manual emails
- **Lengthy development backlogs of change requests** that require extensive IT resources
- **Limited visibility into where cases stand** across channels and child cases
- **Disjointed agent experiences** that require toggling through multiple screens and applications

These challenges make it more costly to maintain a current solution, delaying time to value and eating away at your potential return on investment (ROI).

Two-dimensional case management



To remedy these challenges and go that one last mile on your promise of delivering seamless experiences, it's important to automate far more than just the routing of the service issue. This means automating and executing the actual work within the case, regardless of how long or sophisticated the process is.

With Pega, a case isn't just the two-dimensional ticket that sends work through your organization; a case is the orchestration and execution of the work itself (with less manual work). It is capable of adjusting to the dimensions of your enterprise, such as the regions that you do business in, the products you sell, and the channels and types of customer you engage. Pega's three-dimensional dynamic case management expands and adapts journeys across these business dimensions, systems, and channels – all in a single model.

Pega cases offer complete end-to-end visibility in a 100% visual environment. Regardless of how many steps and participants in the process, Pega manages the human tasks that need to get done, with automatic escalations and dynamic prioritization to ensure that the right people are working on the right things, regardless of where they live in your organization. The case leverages powerful business rules and intelligence to automate approvals, decisions, and routing to drive the work to fast and easy completion. It uses natural language processing capabilities to instantly read customer emails and documents while extracting and categorizing the necessary information – all without a human having to lift a finger.

Because so much of the automation of work involves connecting to your existing systems, a Pega case includes the APIs necessary to power easy integrations with your existing infrastructure. More importantly, the case logically separates your system logic – where and how you get and update your data – from the business logic (UI) – how you get the work done. This allows you to wrap around existing legacy complexity to create simple experiences for both your employees and your self-service customers.

Moving from a channel-led to a channel-less approach

With separated system logic and business logic, Pega empowers your business to shift the paradigm of omni-channel service from a channel-led to a channel-less approach. Whether connecting via interactive voice response (IVR), web self-service, chatbot, mobile, email, or a call center, agents and customers are able to pick up a case or conversation at the exact place where they left off. The channel in this sense becomes irrelevant. You can simply activate your outcome-driven processes to focus on the customer's journey on any channel, without duplication.

By adding Pega to the equation, you can eliminate assigning repetitive tasks to people and instead assign work to bots that connect with legacy systems – even those without friendly APIs. Pega's case management brings together robotics, intelligence, integration, and process automation, so you can turn labor-intensive, error-prone, manual transactions into fast, frictionless experiences.

Pega upgrades your current case management with greater capabilities:

- **Provide complete real-time visibility** into your cases and child cases from end-to-end.
- **Eliminate coding** for screen configuration and representational state transfer (REST) calls.
- Extend cases to **any touch point**, including self-service, IVR, and mobile, so your customers can have a truly channel-less experience.
- **Automate the work itself** from end-to-end with seamless, "lights out" robotic automation (RDA/RPA), to connect into any legacy system.

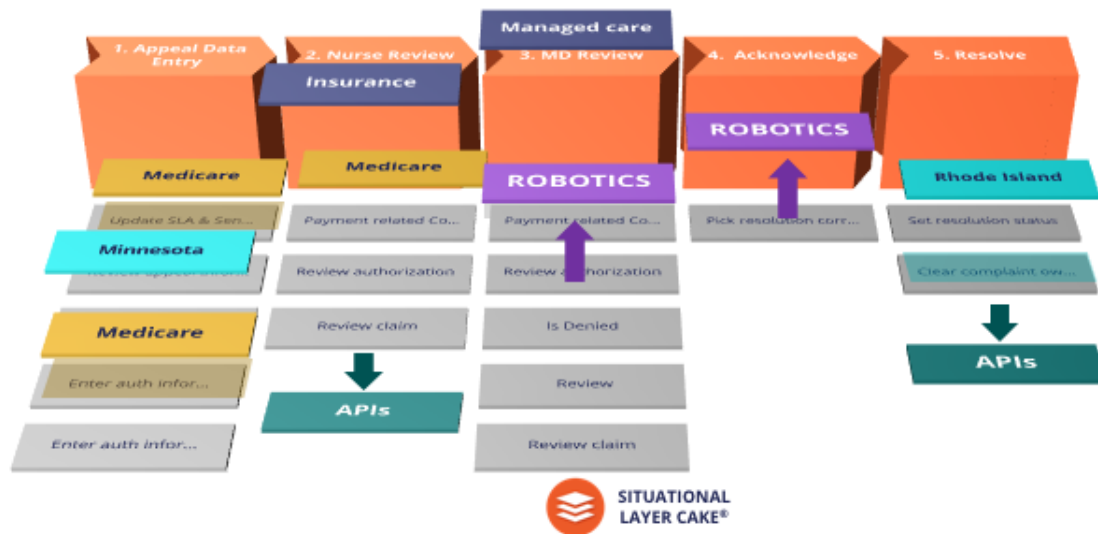
Success story

A large North American contact center outsourcing company employs thousands of agents and serves more than 18 million contacts. In the past, agents were required to use many different service screens. By implementing Pega, all information appears on a single screen, regardless of the channel of interaction. Now processes that once took up to three minutes are automated and executed in under 30 seconds, empowering agents to focus on what matters most: their customers.

Simplify your complexity: Pega's multi-dimensional architecture

A single service interaction could touch multiple workers across several different teams and areas within your service environment. With so many moving pieces and potential scenarios, it may feel impossible to create efficiencies that reach across your entire business. Yet upon closer inspection, you're likely to discover that your organization shares many similar processes, just with certain variations.

Your geographies, business units, departments, or teams operate differently for certain channels or segments. In spite of all these variations, there are common elements across your enterprise. Rather than having to create duplicate, disconnected versions for each area of your business, Pega streamlines processes across the enterprise into a common model. By leveraging Pega's patented Situational Layer Cake™ architecture, which factors in the many dimensions of your organization, you can lay the groundwork with your common elements and customize for unique scenarios within each process. By extending your current customer service system using Pega's three-dimensional case, you can efficiently manage multidimensional hierarchy and process differences in ways that facilitate, reuse, and rein in complexity.



With Pega's Situational Layer Cake, you lay the foundation of steps for a given process and can create individual layers that account for specificities for different aspects of your business, such as region, industry, policy, products, or department.

Start working faster and smarter, like these global innovators

Pega has helped the world's leading enterprises deliver seamless service experiences using end-to-end case management and intelligent automation. Because Pega cases are automatically created at each touchpoint along the customer journey, it's easy to understand and maintain individual goals across every interaction and channel.

For example, a leading healthcare company was struggling to streamline service processes for complex patient cases. Nurse practitioners who handled calls involving challenging, high-risk patient scenarios were unable to access all of the data they needed to resolve interactions using their existing system. This led to complicated, manual, and inconsistent processes. After supplementing with Pega, a case is automatically created that maintains a patient's goal across interactions. Nurses and agents now know what actions patients have taken regardless of where they take place, making it easy to know what's done and what remains to be done. With Pega, nurses and service agents perform significantly less manual effort and patients get results faster.

Another global innovator, a large technology company, was stuck with no practical way to effectively integrate their legacy Oracle system with Salesforce. Using Pega as the orchestration engine, what would have been a two-year implementation project was delivered in only a few months. Now, Pega serves as the glue around their universal customer master, ensuring all work corresponds to the customer journey, no matter the context.

"The system not only allows us to offer a great customer experience, but we're doing it fast, we're doing it in real time, and we're doing it without errors"

- CIO, Large Insurance Company

Gain value quickly

Pega makes integration with your existing investments and infrastructure easy. With the power of Pega digital experience API and web mashup capabilities, you can quickly integrate Pega's industry-leading case management capabilities with your existing deployment to start busting silos and driving better customer experiences.

Pega works by providing both front-end and API-level integration to your current system. This enables your current desktop application to:

- Create Pega cases to **manage and automate work from end-to-end.**
- Invoke Pega robotics to **drive desktop automation.**
- **Display a portion of the Pega screen** within your existing user interface.

The solution leverages your existing system's API to allow Pega to directly update cases, opportunities, and other objects – without the need for third-party integration software.

Example: Salesforce infused with Pega with complaint case

The screenshot displays a Salesforce account page for 'Top Notch Consulting' with a Pega case management overlay. The overlay is titled 'Service - 5-8002 - Service' and shows a progress bar with stages: 'New Service', 'Connected', and 'Resolved'. Below the progress bar, there are three service categories: 'TV/Cable Service', 'Internet Service', and 'Home Phone Service'. The 'Internet Service' section is active, showing options for 'Internet' (checked), 'TV', and 'Home Phone Service'. The 'Internet Option' section has radio buttons for '25 Mbps', '100 Mbps', and '300 Mbps' (selected). There are 'Cancel', 'Save', and 'Submit' buttons at the bottom of the form. On the right side, there is an 'Activity' panel with tabs for 'New Task', 'Log a Call', 'New Event', and 'Email'. The 'Log a Call' tab is active, showing a 'Subject' field with 'Call', a 'Comments' text area, a 'Name' field with a search dropdown, and a 'Related To' field with 'Top Notch Consulting' selected. There is a 'Save' button at the bottom of the activity panel. The bottom right corner of the overlay shows filters: 'Filters: All time • All activities • All types'.

Better together: Boost ROI and take your current investment further with Pega

The added investment in Pega can help you gain significantly more value from your customer tools. Now, you can:

- **Close gaps** in end-to-end automation, potentially leading to millions of dollars in additional conversions.
- **Reduce costs** by optimizing all customer service channels for choice, deflection, and issue resolution.
- **Avoid paying for increased delivery and maintenance costs**, driven by the extensive customization required to scale and harden your current deployment. This often requires countless hard-code extensions that are time consuming, costly to write, and expensive to maintain.
- **Work in a 100% visual environment.** Pega isn't just a low-code environment, it's a no-code environment. This allows you to extend your current environment without additional coding.
- **Accelerate resolution for your customers** by empowering your agents to focus on the important problems, rather than tracking repetitive, manual work.

Until you close these gaps, you're paying for opportunity costs stemming from missing functionality, lost revenue opportunities, limited user productivity, and inability to transition disconnected, legacy processes to less expensive, self-service channels.

Pega has demonstrated proven results for enterprise organizations, just like yours. According to an independent Forrester Total Economic Impact (TEI) study, these results include:

- **\$9.8 million average cost savings**
- **20% reduction in customer churn**
- **Less than 6-month payback period**
- **298% ROI**



So what's stopping you? Learn more about how you can increase ROI and supercharge your customer service investments for the scale and complexity of your business – all with Pega.

Schedule your customized walk-through today.



We are Pegasystems, the leader in software for customer engagement and operational excellence. Our adaptive, cloud-architected software – built on the unified Pega Platform™ – empowers people to rapidly deploy and easily change applications to meet strategic business needs. Over our 35-year history, we've delivered award-winning capabilities in CRM and digital process automation (DPA), powered by advanced artificial intelligence and robotic automation, to help the world's leading brands achieve breakthrough business results.

For more information, please visit us at www.pegacom