



Pega Demo: Engage, Automate & Build – Without Limits

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**CUSTOMER
ENGAGEMENT**



**DIGITAL PROCESS
AUTOMATION**

Pega Infinity™

Engage without limits





MARKETING SELF-OPTIMIZING CAMPAIGNS

PEGA Marketing

TC

1:1 Engagement Campaign ⚡ RUNNING

Stop Actions



Engagement criteria
Audience: 100.0K Offers: 3



Outcome optimization
Response rate



Timeframe
30 days

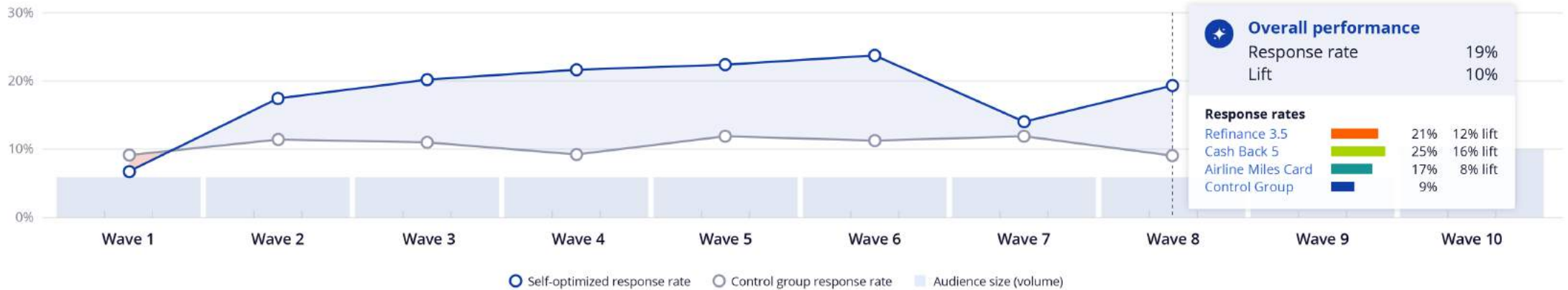


AI insights
19% response rate / 10% lift

Self-optimizing campaign

Overview By offers

Response rate
6/30/2018 - 7/30/2018



Overall performance

Response rate: 19%

Lift: 10%

Response rates

Refinance 3.5	21%	12% lift
Cash Back 5	25%	16% lift
Airline Miles Card	17%	8% lift
Control Group	9%	



CUSTOMER SERVICE AI-AUGMENTED AGENT

PEGA Customer Service

All Search...

Mildred Gray **OWNER**

CONTACT INFORMATION
Callback: (617) 374-9637

CUSTOMER SUMMARY
Open cases: 31

How can I help you today, Ms. Gray?

Summary Account

ACCOUNT	TYPE	ROLE	BALANCE	PAYMENT
00114598769	Credit card	Owner	\$5,245.00	\$75.00

Recent cases

- Dispute charge S-1267
Urgency: 10 Due: 2h ago **OPEN**
- Open account S-8976
Urgency: 10 Due: 7h ago **PENDING**
- Update profile S-0912
Urgency: 10 Due: 1d 1h ago **RESOLVED**

Recent interactions

- Dispute charge S-3424
March 1, 2018 - 45m ago
- Update profile S-4777
March 1, 2018 - 7hr ago
- Claim status S-9345
February 28, 2018 - 2d ago

Transactions [View all](#)

Statements [View all](#)

NPS: 9

Live chat with Mildred

2:25pm
Here's a guide on [Determining Your Income Source](#).
94% confidence - suggested

MG Got it. My primary income source is my house cleaning business.

2:26pm
Great, thank you. I'll go ahead and finish up your application.
96% confidence - automated

Suggested replies 89% confidence
Are you interested in our credit protection plan?
Reply



INTELLIGENCE NEXT BEST MOMENT™

+ Customer Movie

Actions ▾

Marion Sutton



60.1 %

Likelihood that Marion Sutton will call in 15-30 days to take out a mortgage.

Timeline of past events



Top predictions of future events for Marion Sutton

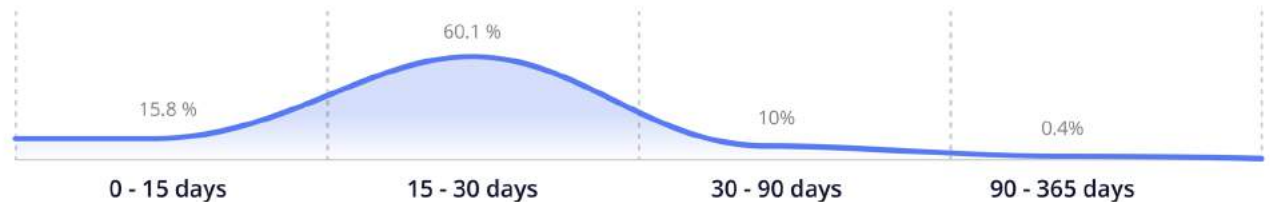
	0 - 15 days	15 - 30 days	30 - 90 days	90 - 365 days
Mortgage	📅 14 %	📞 60.1 %	📞 30 %	🏠 15 %
Home insurance			📅 16 %	📞 39 %
Travel insurance			📅 21 %	📞 13 %

0% 100% likelihood

Likelihood over time of Marion Sutton taking out a mortgage through a call center

86.3 %

Overall likelihood





PREDICTION STUDIO Application: Customer Engagement Center Search... Environment: DEV

Predictions

Transparency thresholds
Models with a transparency score above or equal to the threshold of business issues, are compliant. A high transparency score of 5 indicates that models are fully auditable.

Category	Transparency Score
Sales	3
Service	1
Retention	3
Acquisition	4
Support	1

Model Name	Performance (AUC)	Model Type	Compliance
Predict Attrition	↑85.31	Regression	Compliant
Predict Upsell	↑73.65	Adaptive	Compliant
Probability to Click	↓81.54	Regression	Compliant
Predict Churn within 90 days	68.07	Regression	Compliant



Automate from end-to-end



AUTOMATE EMAIL BOT

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

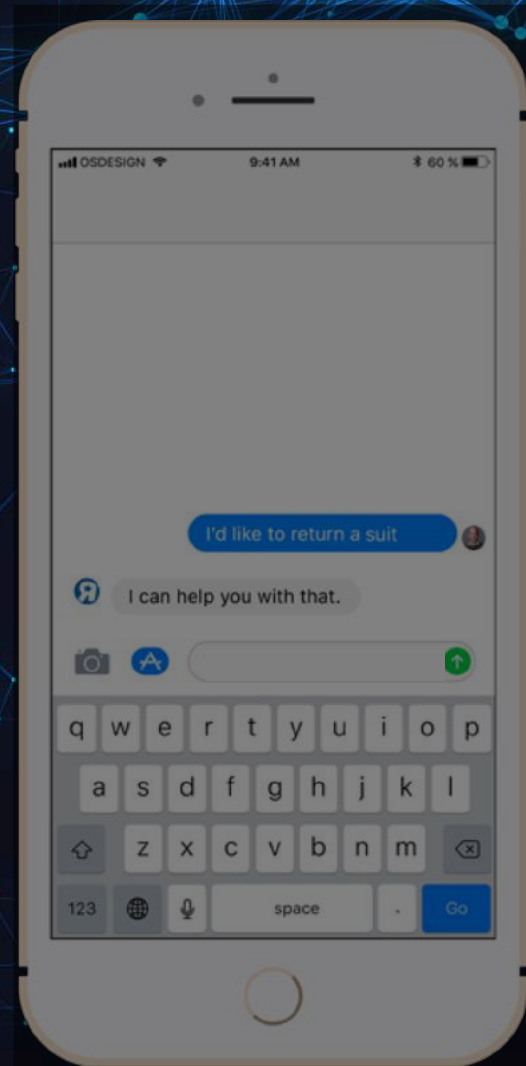
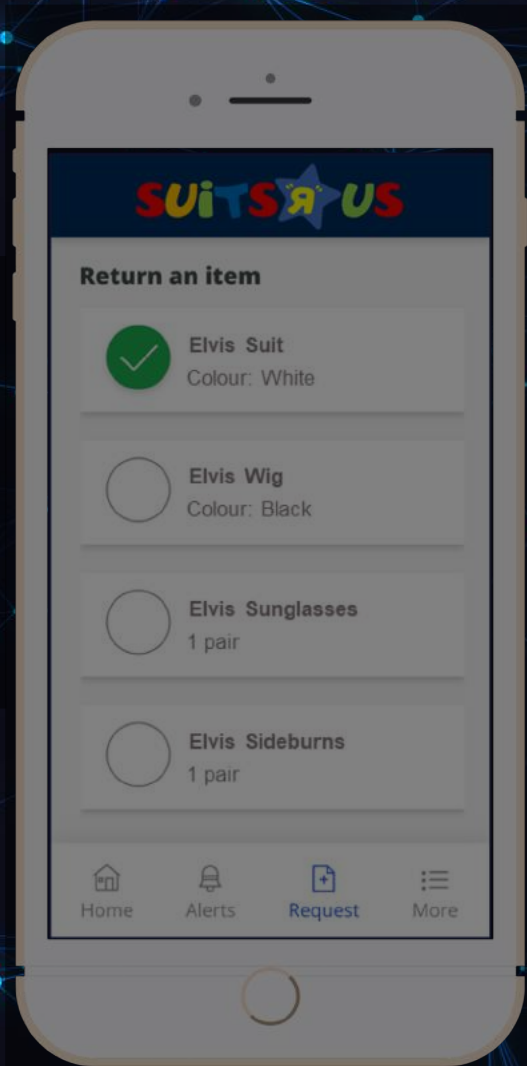
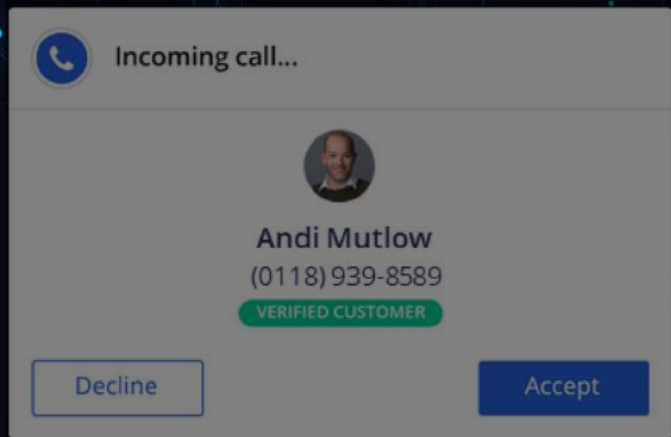
#VIN= 1HGBH41JXMN109

#Make= Honda



SUITS★US

MAKING GEEKS LOOK GREAT!





SUITS★US

MAKING GEEKS LOOK GREAT!

A close-up photograph of a hand making a peace sign (V-sign) against a bright, hazy sunset background. The hand is in the foreground, with the index and middle fingers extended upwards. The background is a soft, out-of-focus glow of orange and yellow light, suggesting a sunset or sunrise. The overall mood is peaceful and optimistic.

IMAGINE

ALL YOUR CUSTOMERS

ENGAGING WITH YOU IN PEACE 😊



AUTOMATE WORKFORCE INTELLIGENCE



Customer Operations

3rd out of 6 departments

Insights



The most commonly used workflow for the **last week** in the **Banker Insight Transaction** opportunity has **5 transitions** across **3 apps** and **5 screens**



Time spent in **non-work** activities has dropped three percentage points to **11%** for **Customer Operations**

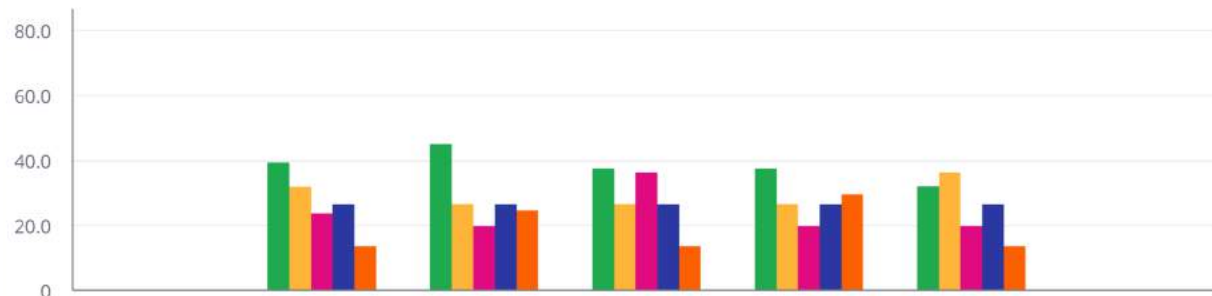


We've noticed a high number of **cut/copy/paste** events between **Excel** and **Customer Service** in the **last week**. This may be an automation or integration opportunity to improve efficiency.

Showing 3 of 7 insights. [See all insights](#)

How is time spent?

Production Other Work Non-work Idle Unknown



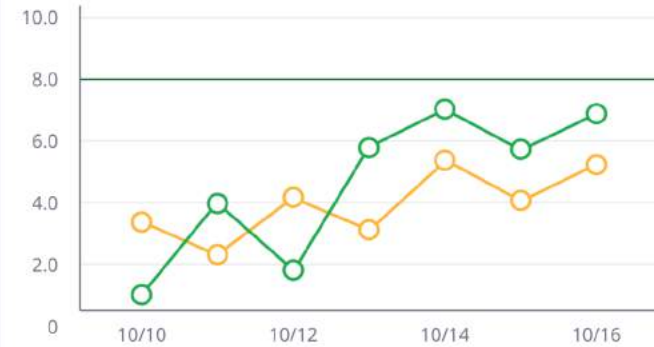
Production score

-4.8

Production hours 140h 5m

Expected production hours 300h 0m

Production trend



Where is time spent?

All Categories

Rank	Application	Hours
1.	Banking	80h 4m
2.	Financial Services	80h 0m



AUTOMATE TASK BOT

Customer Service



Robots (134)

<input type="checkbox"/> Robot	Current activity	Completed	Success rate	
<input checked="" type="checkbox"/> CS-01	Working...	50	98%	⋮
<input checked="" type="checkbox"/> CS-02 Needs attention	Working...	50	30%	⋮
<input checked="" type="checkbox"/> CS-03	Working...	4	96%	⋮
<input type="checkbox"/> CS-04	Waiting for work	34	70%	⋮
<input type="checkbox"/> CS-06	Shutting down...	50	96%	⋮

Insights

- Assignment queues** [Tell me more](#)
 Address change was over capacity 30% of the time
 Update profile was over capacity 30% of the time
 Statement Inquiry was over capacity 30% of the time
- Robots** [Tell me more](#)
 2 robots stopped one or more times
 3 robots failed too many assignments



AUTOMATE DATA BOT

APP STUDIO Application: Vegas Vines Preview Environment: DEV

Data & integration

8 data types

View integration landscape

Data type	Data views	Referenced by	Systems of record
Customer	Customer Details Gold Customers New accounts +3 more	Open Account Order Return Refund +10 more	Zipcodes Accounts
Order	Order details Orders	Order Return Lost Shipment	PEGA Order (legacy)
Product	Product details SIMULATED	Order Return Lost Shipment Order +2 more	
Shipment	Shipment details Shipments	Order Return Lost Shipment	Address Order (legacy)
Supplier	Supplier details Suppliers	Contract Product	Providers
Contract	Contract details Contracts	Supplier	Suppliers
Payment	Payment details SIMULATED	Order Return Order Shipment +1 more	



**AUTOMATE
CHATBOT**

Chatbot support



Is this a personal, or business loan?

Personal loan



What is the purpose of the loan? E.g. "Mortgage".

Mortgage

Type a message here



Build for change



Channels interfaces [View all \(5\)](#)

- CSR Web**
Admin, CSR, Manager
- CS Tracking**
Manager
- Requests inbox**
Manager, CSR
- FAQ bot**
CSR, User

Case types [View all \(12\)](#)

Order Return

Initiate Return → Process → Fulfill

Lost Shipment

Identify → Resolve

Refund

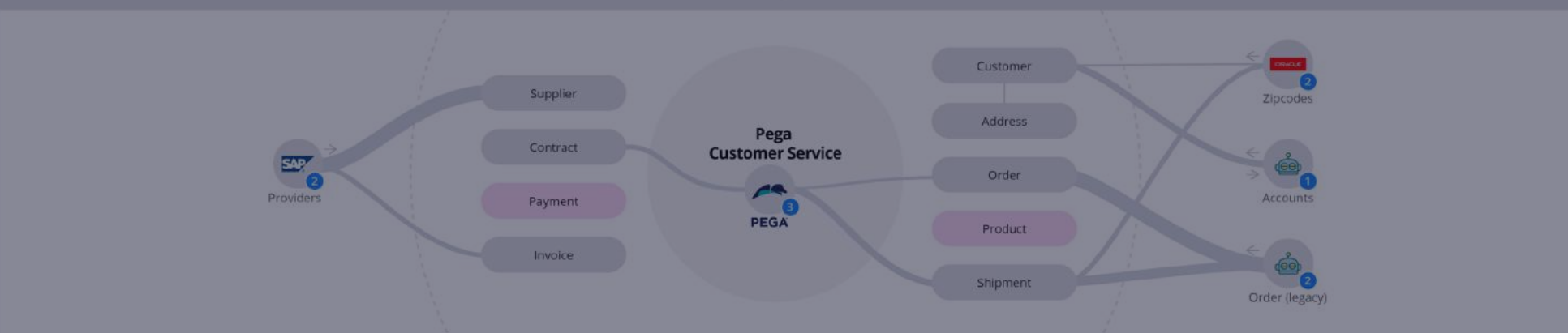
Create → Review → Approve → Refund

Application layers

- Vegas Vines 01.01.01
- Pega Customer Service 08.01.01
- Pega RULES 08.01.01

Predictions [View all \(23\)](#)

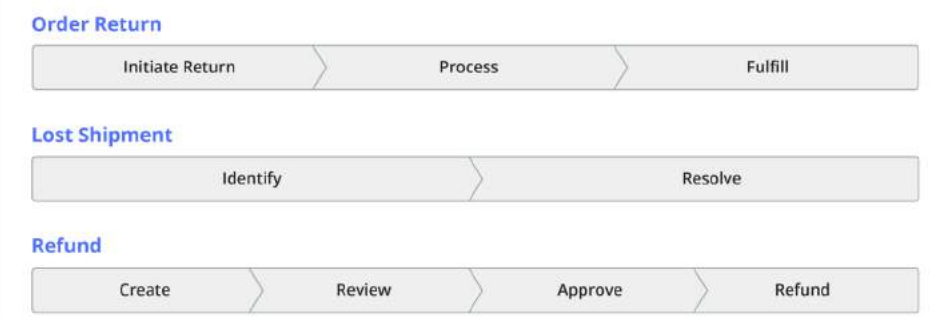
- 85** (AUC)
Predict Attrition
Regression | Compliant
- 79** (AUC)
Predict Upsell
Regression | Compliant
- 73** (AUC)
Probability to Click
Regression | Compliant



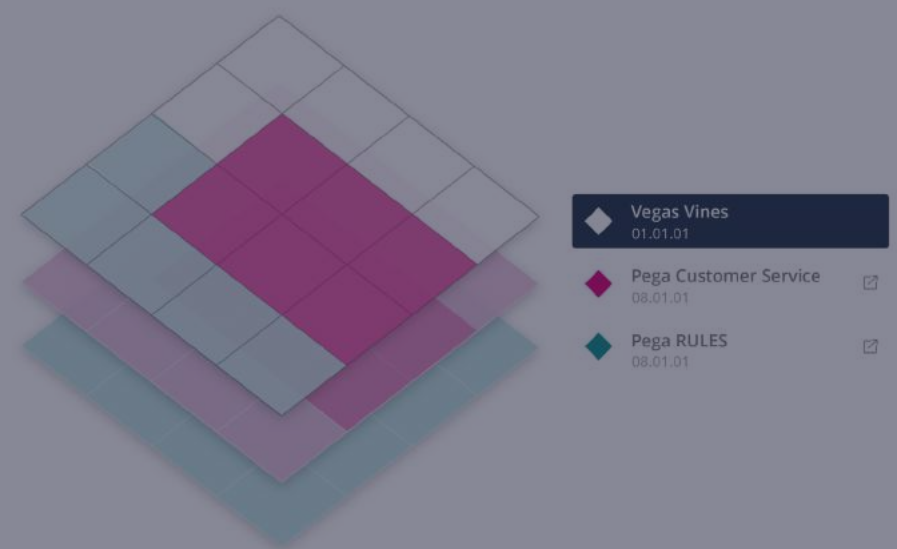
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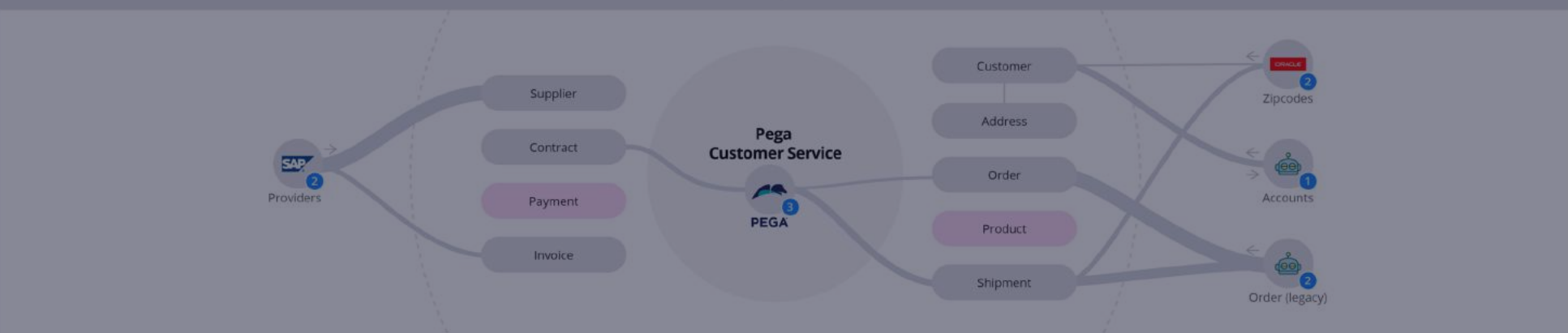


Application layers



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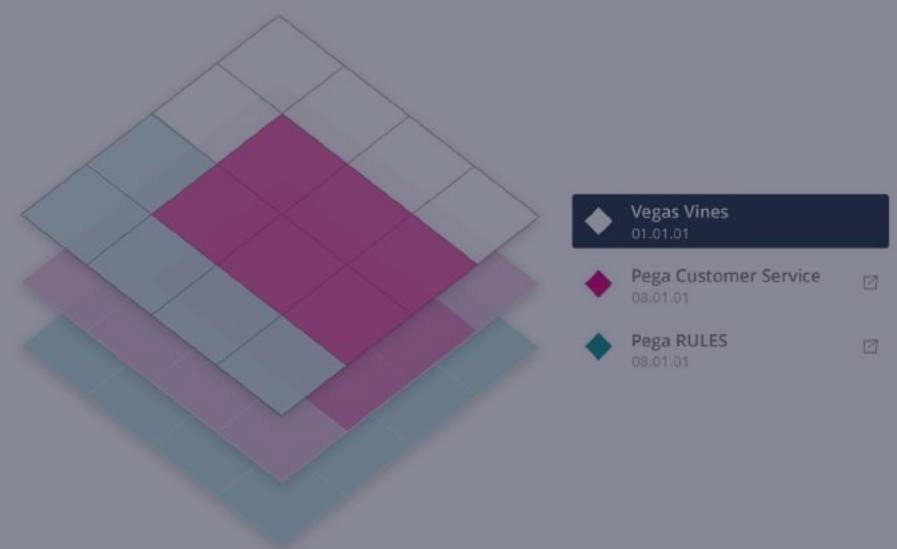
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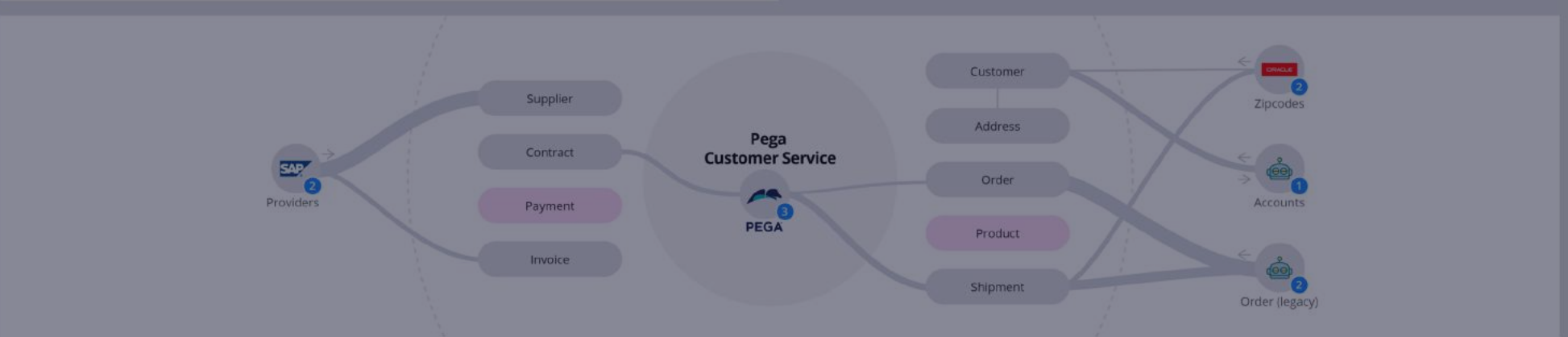


Application layers



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Channels interfaces View all (5)



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Admin, CSR, Manager



CS Tracking
Manager



Requests inbox
Manager, CSR



FAQ bot
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Case types View all (12)

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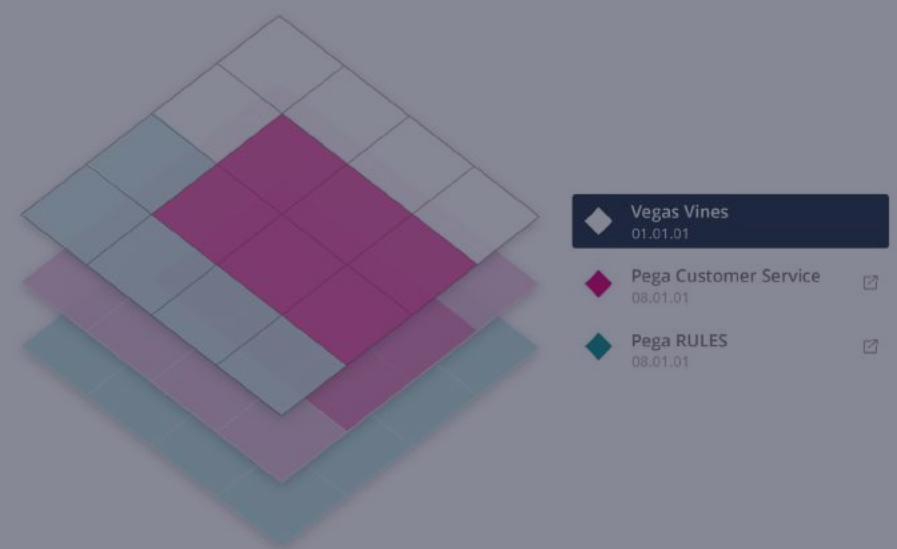
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Refund

Create → Review → Approve → Refund

Application layers

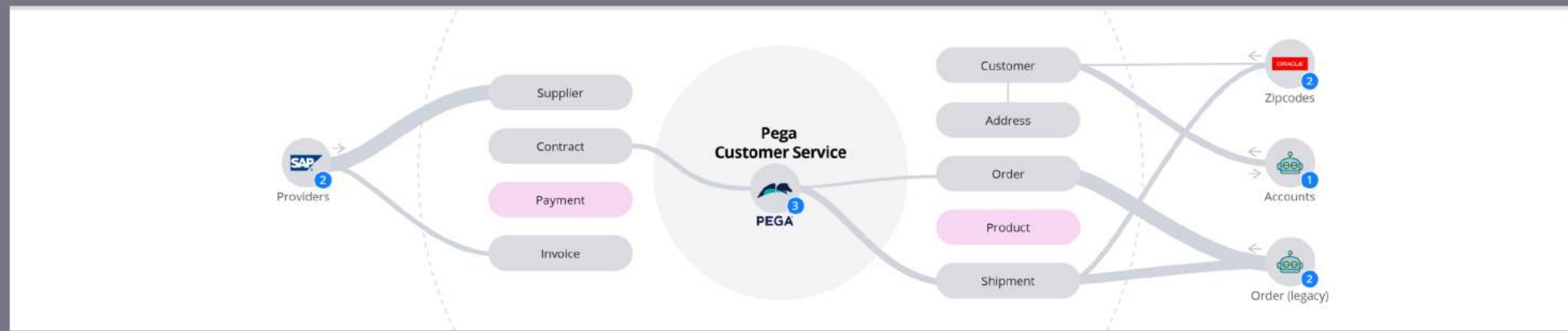


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Channels interfaces View all (5)

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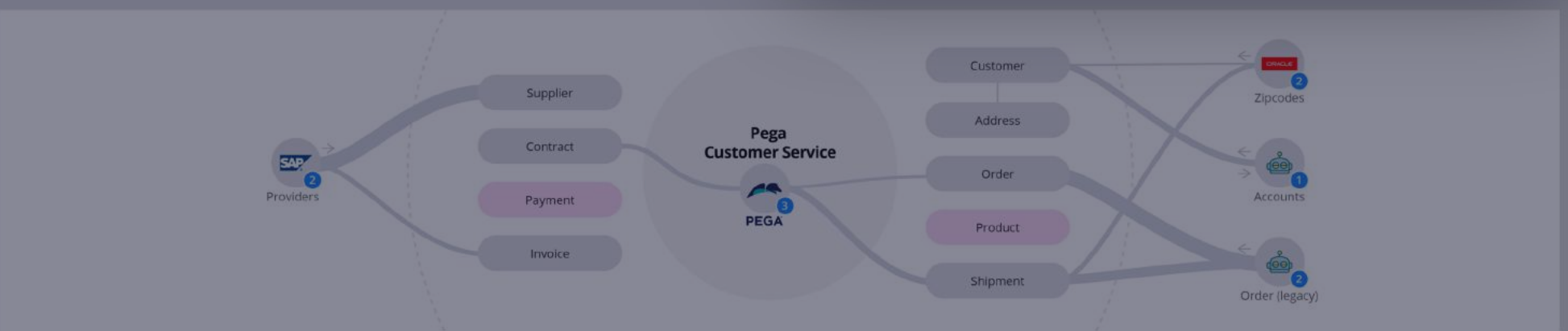
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Application layers

From layer: Pega Customer Service (08.01.01)

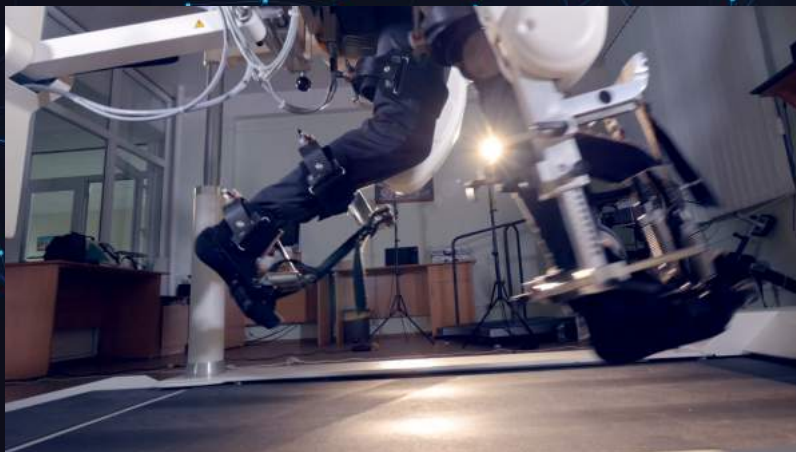
- UI: 3 Pages, Skin, 12 Templates, 36 Widgets
- Automations: 24 Case types, 31 processes, 5 RPAs
- Channel interfaces: 2 Web, 1 Facebook

- Vegas Vines** 01.01.01
- Pega Customer Service** 08.01.01
- Pega RULES** 08.01.01





ENGAGE



AUTOMATE



BUILD





Pega Infinity™