



PegaWorldiNspire

Pega 101: Overview of Pega's Vision and Technologies

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Global Head of CRM, Pega



Uncertain times only make those changes more urgent

- Work environments have drastically changed: The future of work is now!
- Economic pressures are impacting customers and businesses.
- Markets, rules, policies, and regulations are all changing rapidly.
- Uncertainty and change are the new normal.



What are the business problems Pega solves?

Pega drives better business outcomes by...



Making decisions

Delivering one-to-one customer engagement powered by **real-time, omni-channel AI**



Getting work done

Making customer and employee-facing processes more efficient through **end-to-end automation & robotics**



...and very often we can do **both**.
For example, in the context of **customer service** it's when customer interactions involve processing work to resolve a request.

Pega Infinity™

Rapidly deploy automated processes
Optimize customer value
Streamline service experiences

BRILLIANT
DECISIONS



GET WORK
DONE



REAL-TIME,
OMNI-CHANNEL
AI

Industry-leading technology



END-TO-END
AUTOMATION &
ROBOTICS



MICROJOURNEY-
CENTRIC RAPID
DELIVERY

Start fast and scale



SITUATIONAL
LAYER CAKE™



SOFTWARE THAT
WRITES YOUR
SOFTWARE™

Future proof your investment



CLOUD
CHOICE

PEGA DX ARCHITECTURE™

Rapidly deploy
automated processes
with **Intelligent
Automation**

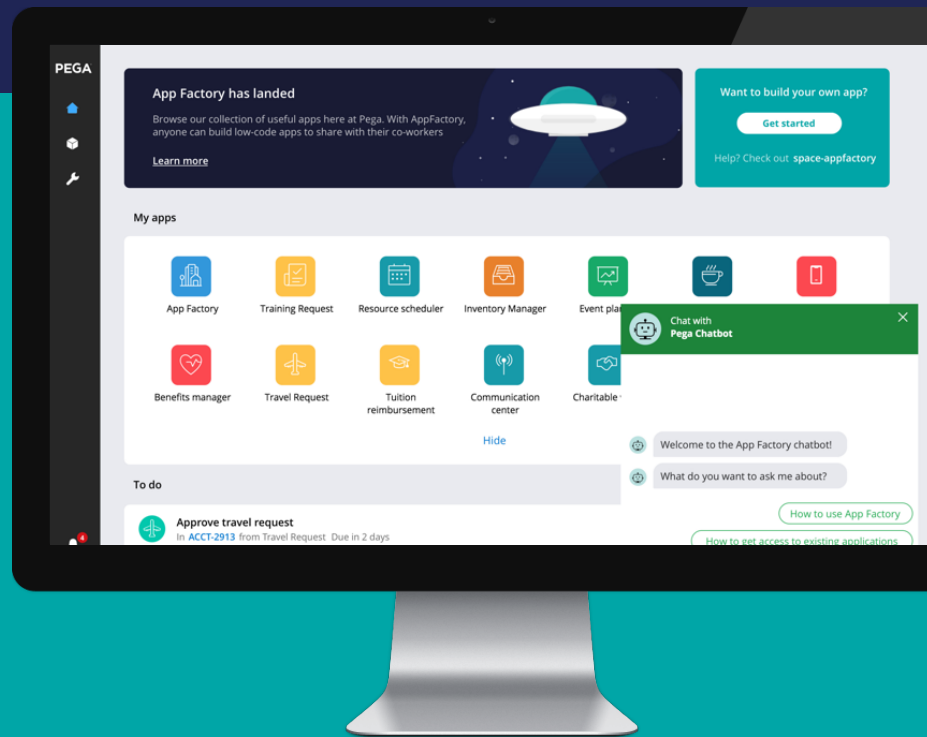
Pega App Studio and Pega Low-Code App Factory

Providing the tools, training, and guidelines for anyone to quickly develop enterprise apps

- Employees gain the freedom and confidence to build the apps they need to succeed.
- IT has the control to ensure every app is created within organizational guardrails – whether it's one or 1,000.
- Organizations can now operationalize and scale low-code development company-wide.

Learn more on Pega Community

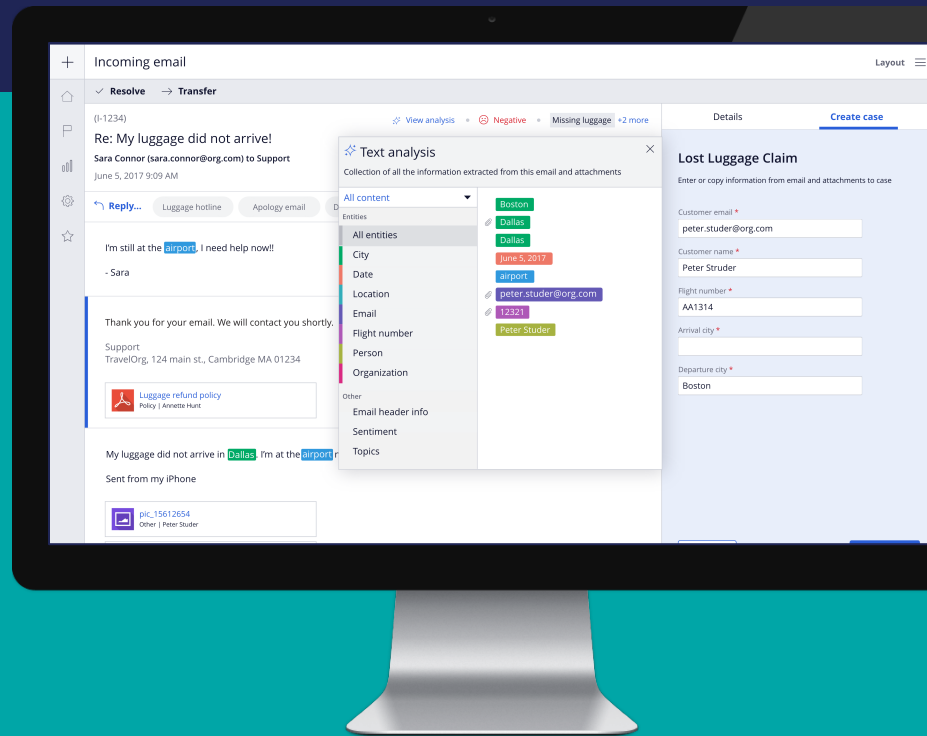
<https://community.pega.com/low-code-factory>



How Pega Email Bot understands email

Using AI and natural language processing (NLP) text analysis

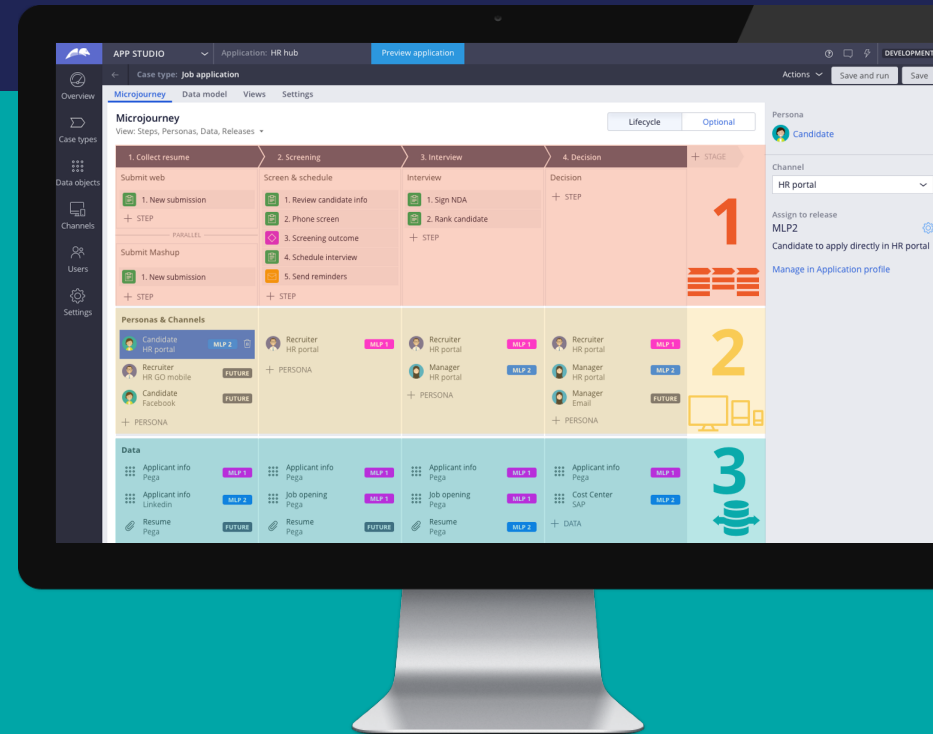
- **Get the right info:** Pega Email Bot uses the Pega Platform's low-code NLP text analysis capability to capture:
 - **Topic:** Why someone is sending an email
 - **Sentiment:** Feelings about the interaction
 - **Entities:** Critical pieces of information like addresses, names, account numbers
- **From emails and documents:** By default, Email Bot scans email subjects and bodies across **multiple languages**. Using Pega's OCR component, Pega Email Bot can digitize attached **documents and images** for NLP text analysis.
- **To the right people or systems:** Setup intelligent routing rules based on AI's analysis to:
 - **Automatically reply** instantly
 - **Create cases** to get work done
 - **Triage** to a team or individual



How Pega Email Bot actions email

Getting started quickly with Pega App Studio and Email Manager

- **Define microjourneys:** With Pega App Studio's low-code capabilities, companies are able to rapidly define and deploy the processes they use for emails by defining:
 1. **Case stages & statuses:** The lifecycle of the email
 2. **Personas & channels:** Who is involved in processing
 3. **Data objects:** What info you need to complete the work
- **Automate outcomes iteratively:** Start small – with simple cases and automations, and use App Studio's **MLP release plan** to schedule, develop, and deploy powerful automations, new communication channels, and integrations to back-end systems.
- **Give employees the right tools:** As Email Bot works to automate the remote work, customer service agents are able to **respond** and **triage** non-automated emails in a purpose-built interface.



Optimize customer value with **1:1** **Customer** **Engagement**

\$150M/Year
(for every 10M customers)

Pega's Customer Decision Hub

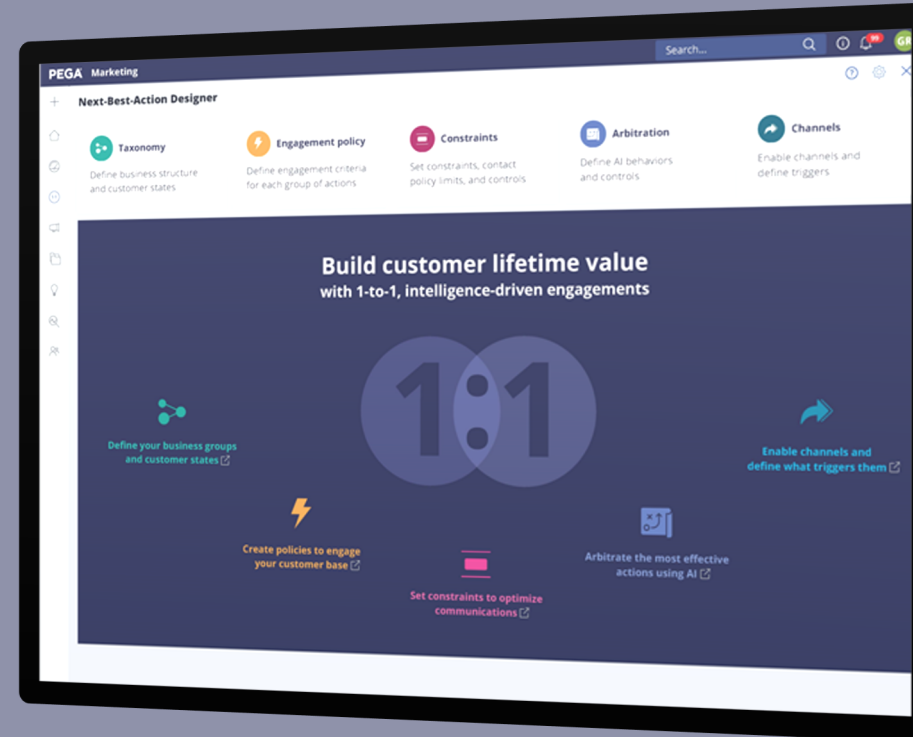
"With Pega, we can forget about the channel – it's irrelevant. The idea of audience-based segments is gone. We have genuine, relevant, one-to-one conversations personalized to the individual – making decisions based on what happened half a second ago."

– **Simon Esland**

Group Head of Marketing Technology, Vodafone

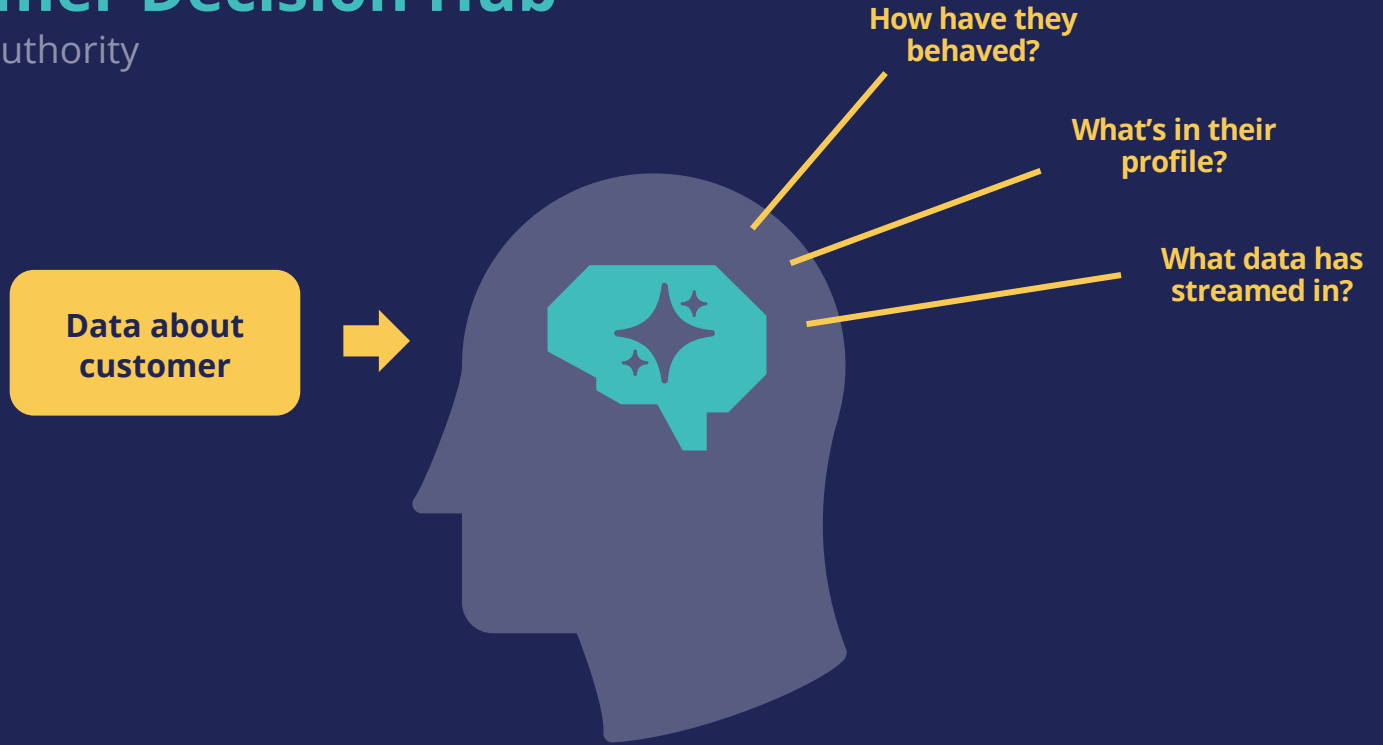
Pega's Customer Decision Hub™ determines the next best action for every customer – then delivers it in their preferred channel, precisely during their moment of need.

- Inbound, outbound, and agent engagement
- Built-in AI, analytics, and machine learning
- Next best action arbitration
- Real-time planning and simulation
- Event-triggered marketing
- Customer journey visualization



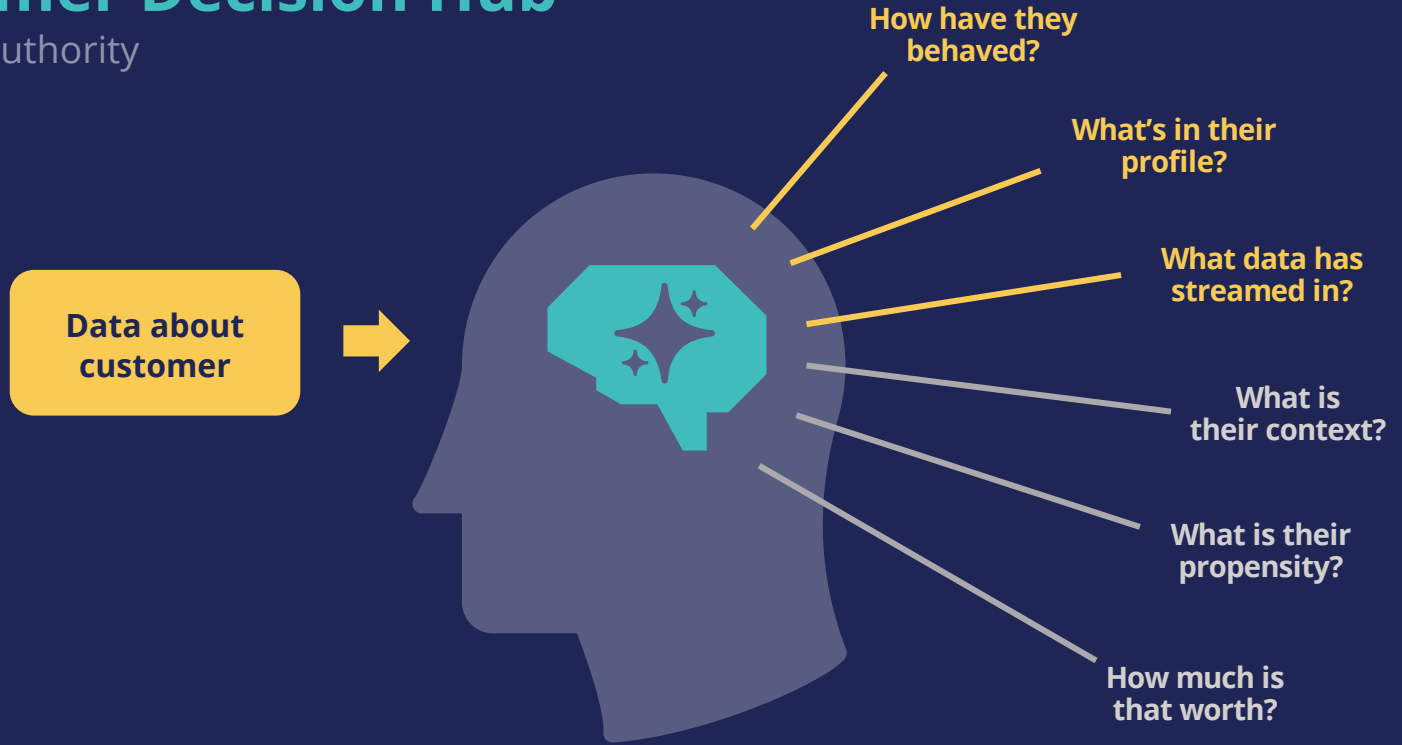
Pega Customer Decision Hub

The single decision authority



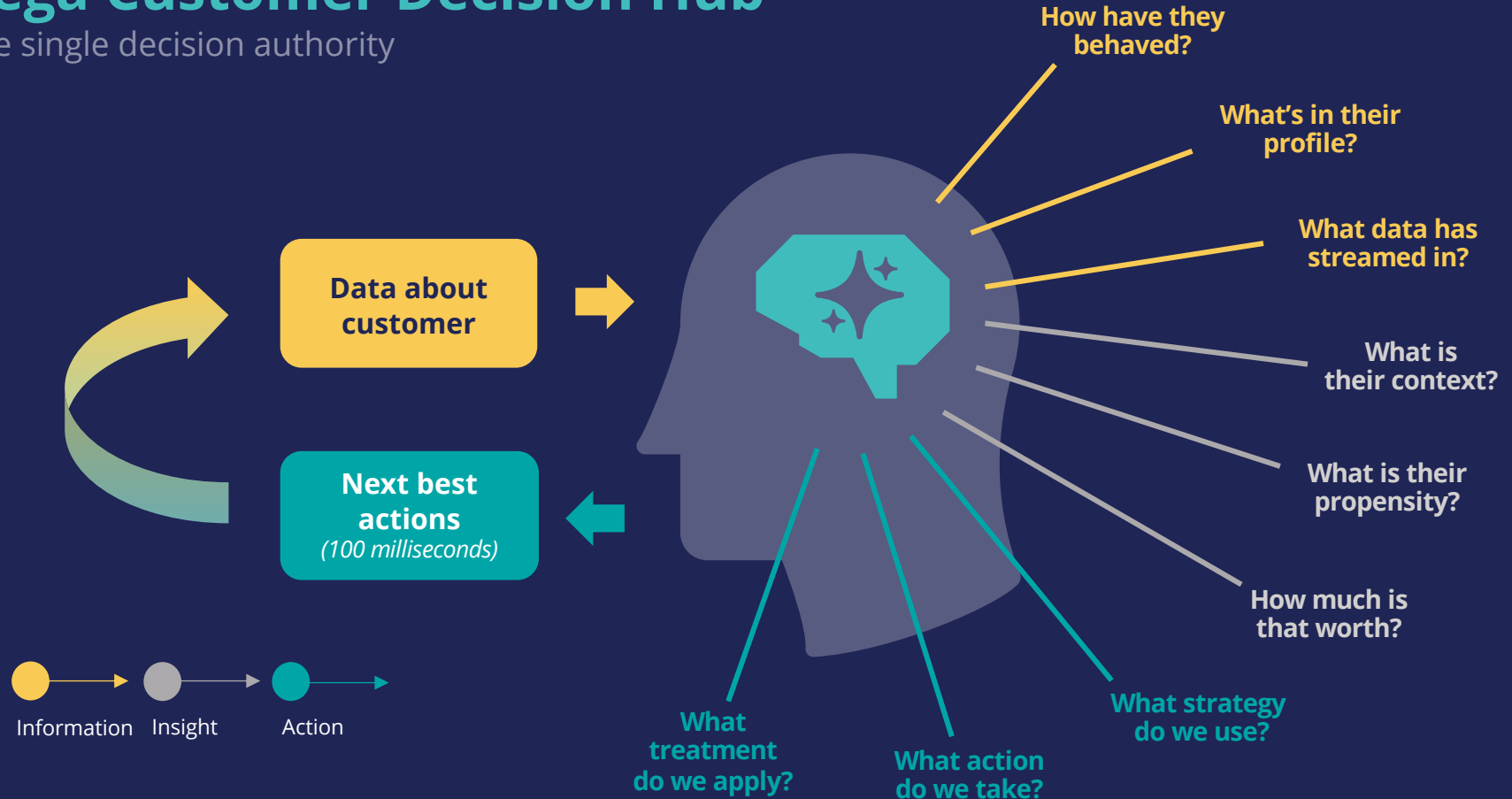
Pega Customer Decision Hub

The single decision authority









Pega Customer Decision Hub

The single decision authority



Track record of accelerated value, unprecedented scale

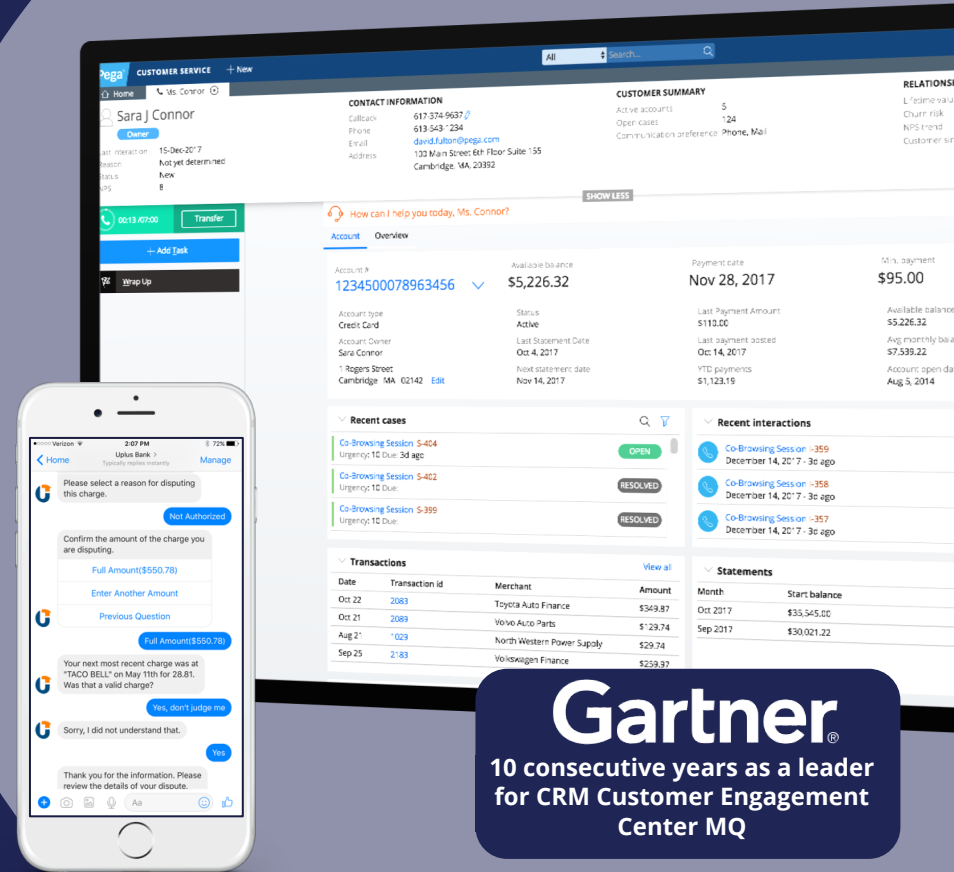
Within one year of investing in Pega Customer Decision Hub

					
700+ self-learning models	200M decisions per day	4x click-through rate	8x customer upsell	#1 in customer experience	\$140M incremental revenue
11 channels	Owned digital channels	Web channel	Retention in call center	Digital & agents	Digital & agents
Inbound & outbound	Acquisition & growth	Initial MVP	90 day initial go-live	#1 CX U.S. northeast banks	Retention & growth
14% average response rate	<100 millisecond response time	Growth strategy	50% NPS lift	#2 nationally in CX	55% lift In service revenue
34% response rate on mobile	Cloud support for 100M customers	400% lift in sales opportunities	15% reduction in churn	#1 for online marketing	Reduced discounts by 29%

Streamline service experiences with **Customer Service**

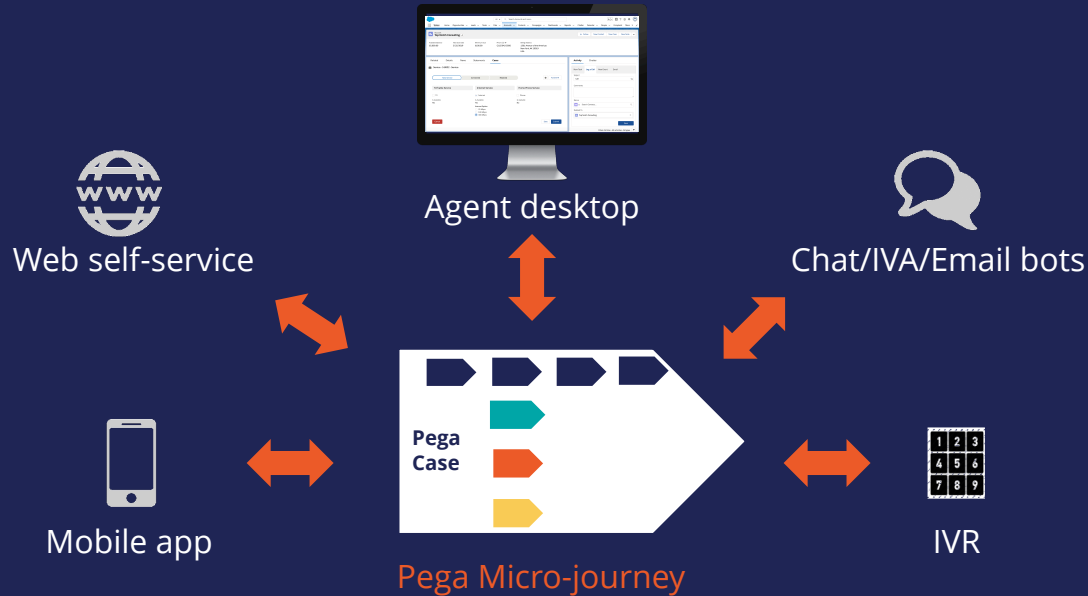
Pega Customer Service

- Unified agent desktop
- Digital messaging
- CTI Integration
- Self-service portals
- Case management
- Real-time co-browse
- Knowledge management & communities
- Guided interactions & coaching
- Troubleshooter
- Robotic process automation (RPA)
- Live data/data virtualization
- ★ AI augmented agent
- ★ AI next best action*
- ★ AI Intelligent Virtual Assistant (IVA)*
- ★ AI email bot*



Gartner
10 consecutive years as a leader for CRM Customer Engagement Center MQ

Tap into Pega's case management superpowers



By completely **separating your case logic** and validation from your UI, you can now access the microjourney **on all channels**.

NEW! Pega Customer Service: Unified Messaging Edition

Streamlines the best of Pega into a unified, easy-to-use interface

- Reduces costs through increased efficiency
 - Improved time to value – **as little as 7 days!**
- Scalable & future-proofed
 - Seamlessly incorporate new channels
- Consistent agent AND customer experiences
 - Same experience, everywhere
 - Removes digital silos using *channel-less vs. channel-led* approach



A proven track record of real service outcomes

Pega Customer Service™



56%
reduction in AHT

Intelligent routing
across 400 offices

93% reduction in
inefficiencies
across cases

25% increase in
worker productivity

80% reduction in
case costs

VIVAT

92%
reduction in
applications

12% increase in
customer
satisfaction scores

Migrated three
CRM systems to
Pega in nine
months

80% reduction
in AHT

38% improvement
in straight-
through-
processing



3x
increase in
customer
satisfaction

4x lower card
member attrition

Decrease in
expense and
service margins

10% increase
in card
member spend

Lower customer
handling time



50%
time reduction
for address
changes

15 systems down
to one

Withdrawal
process reduced
from days to
seven minutes

Live in 14 weeks

Serving 500,000
policy holders with
unified CSR
desktop



33%
improvement
in NPS

20% increase
in FCR

90-day successful
implementation

\$10M
annual savings

30% decrease
in customer
complaints



90%
first contact
resolution rate

#1 for healthcare
customer service

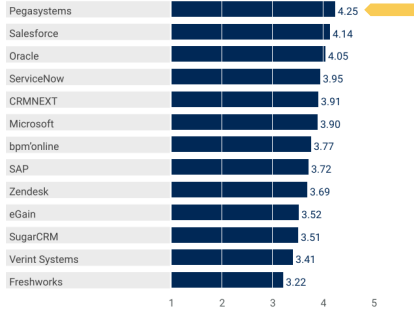
\$100M savings
over 10 years

20% improvement
in call
handling time

Improved
handoff efficiency

CRM customer engagement

Product or Service Scores for Complex Processes

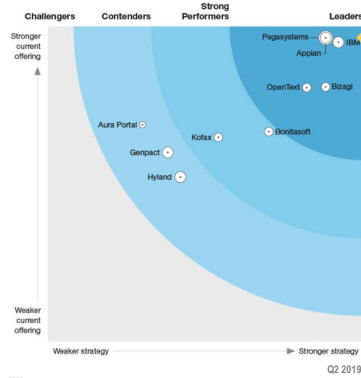


As of 25 September 2018

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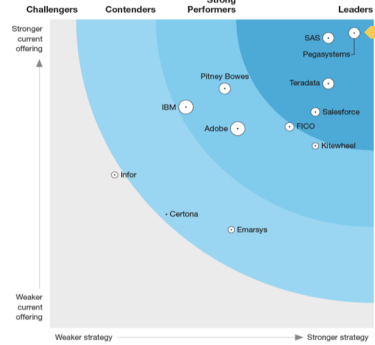
Digital process automation



FORRESTER

The only unified architecture for digital transformation

Real-time decisions & AI



FORRESTER

End-to-end work management



Gartner

“The highest reference customer rating for customer usability. The best ability to build, maintain, and change complex cases. The highest overall product satisfaction ratings.”

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