



PegaWorld

JUNE 7-9 | LAS VEGAS

[PEGAWORLD.COM](https://pegaworld.com)



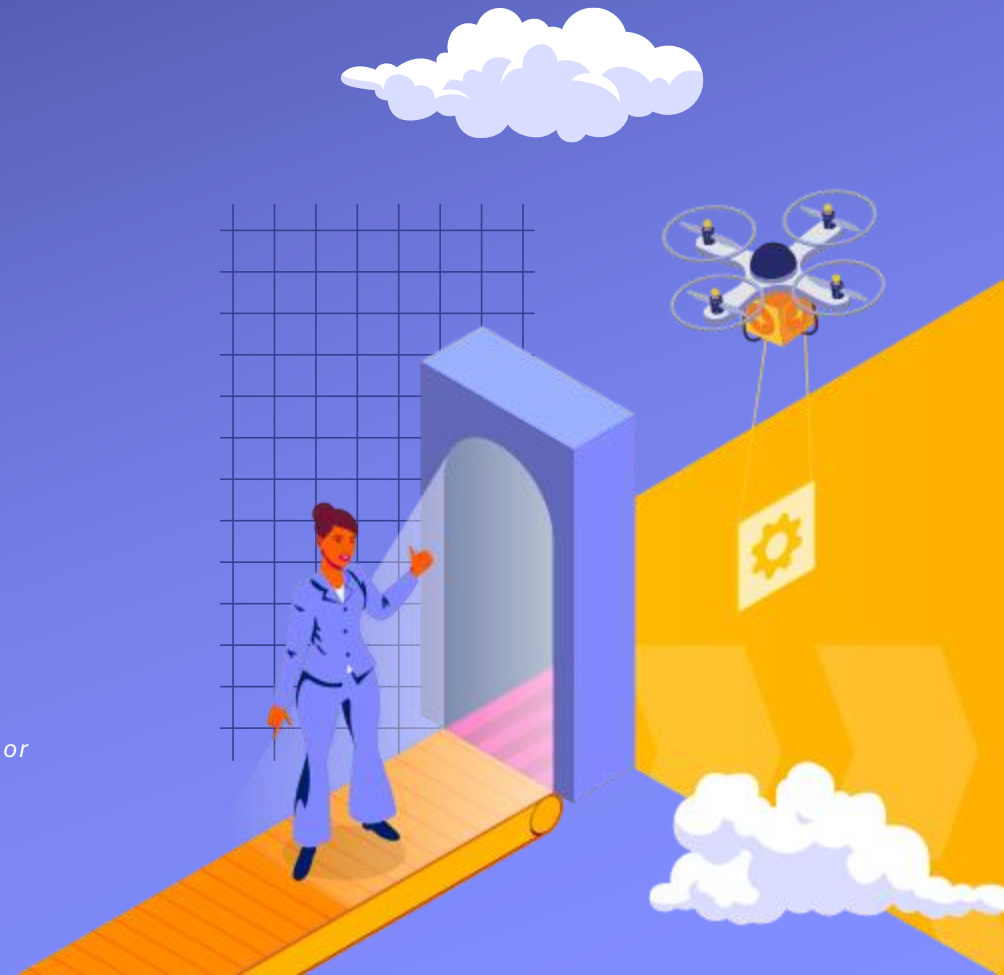
PegaWorld

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AI in Action:

Must-try Agentic Use Cases for Next-level Customer Service

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Brian Daly

Senior Manager,
Customer Service Adoption

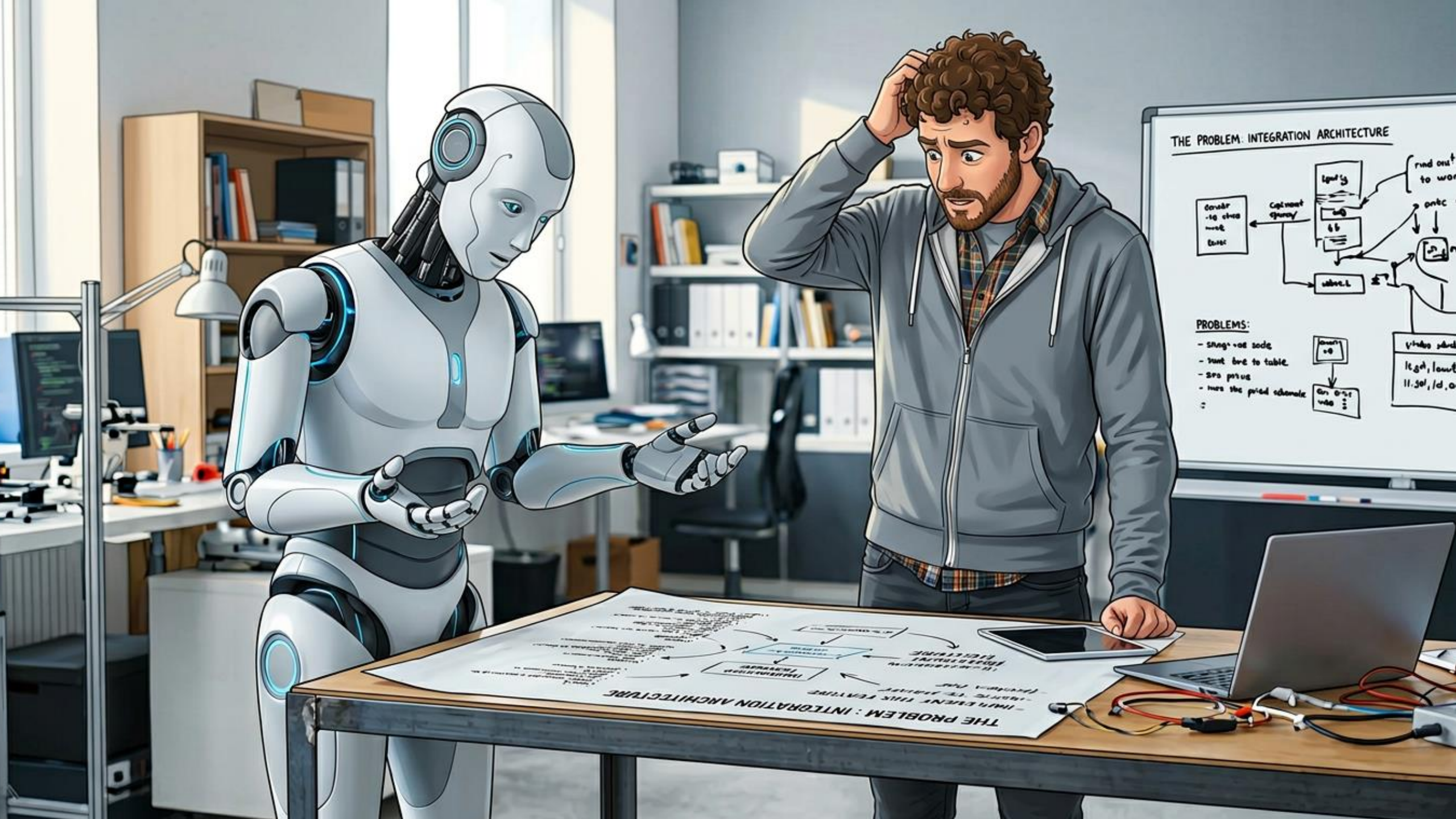
Pega



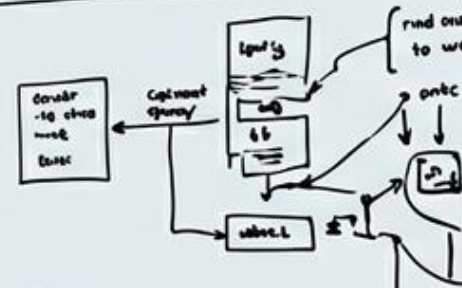
Andi Mutlow

Fellow,
Specialist Solutions Consulting

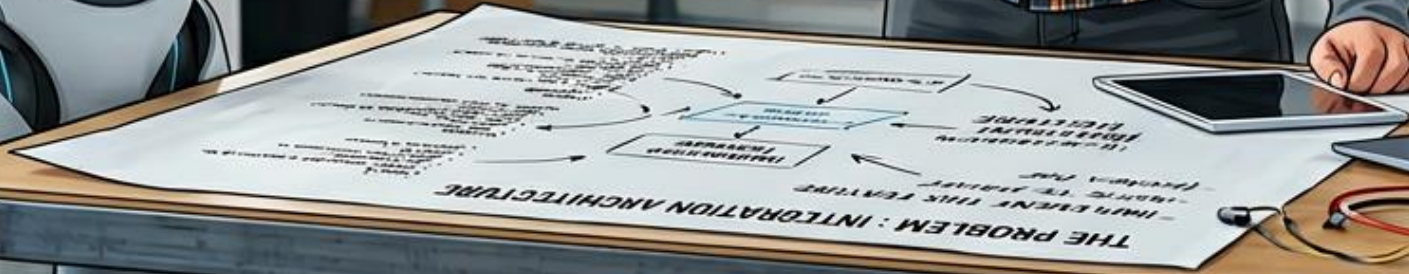
Pega



THE PROBLEM: INTEGRATION ARCHITECTURE



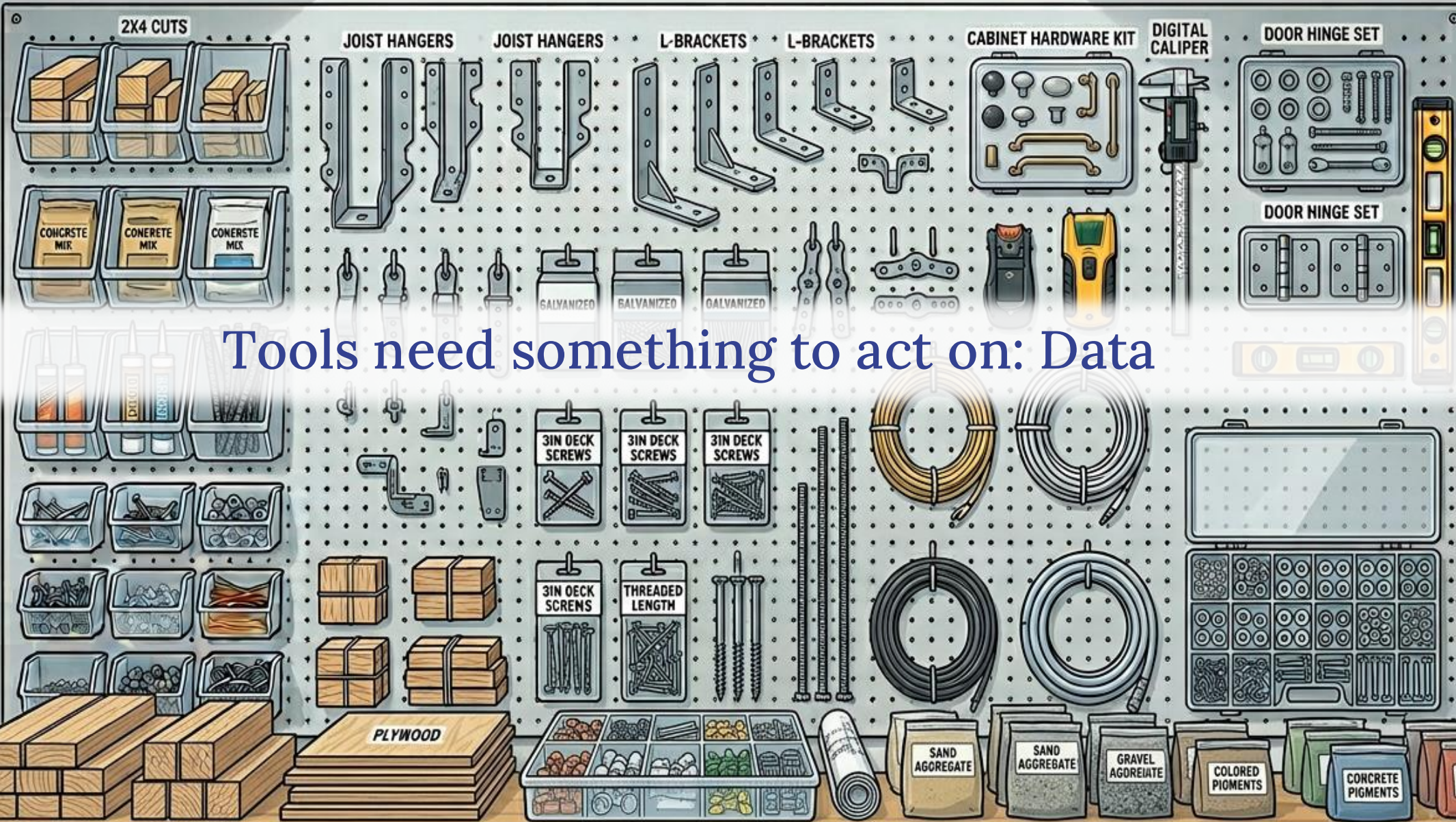
- PROBLEMS:**
- string code
 - want live table
 - see plus
 - miss the prior schedule





AI Becomes Real Through Tools

Tools need something to act on: Data





How do you get from chaos to consistency?

Autonomy Only Works When It's Grounded



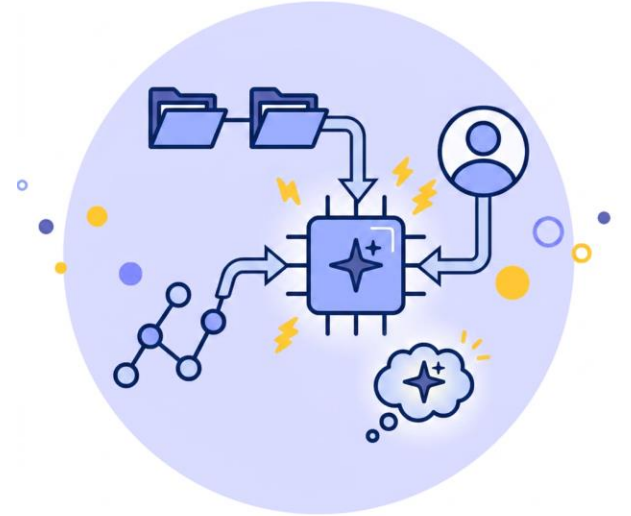
PROCESS

WHAT ARE WE TRYING TO DO, AND
IN WHAT ORDER?



POLICY

WHAT IS PERMITTED AT THIS
MOMENT — AND WHAT IS NOT?



CONTEXT

WHO IS THIS CUSTOMER, AND WHAT
DO WE KNOW RIGHT NOW?

Where Most Organisations Stop, And Why

Coaching Agent

Analytics Agent

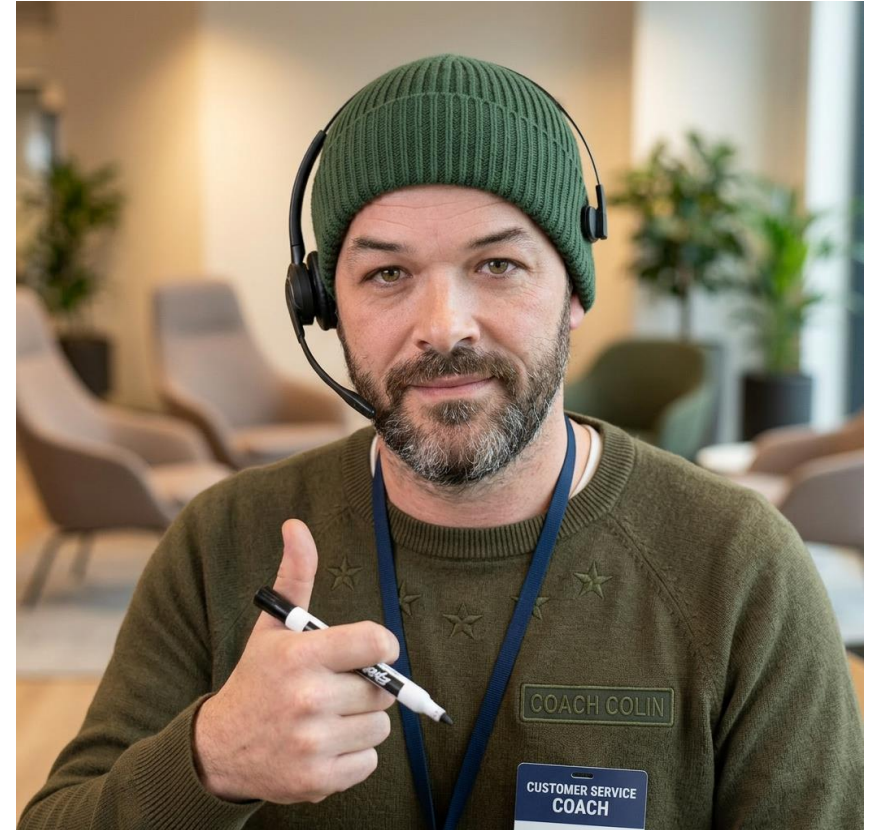
Quality Agent

Silo Buster Agent



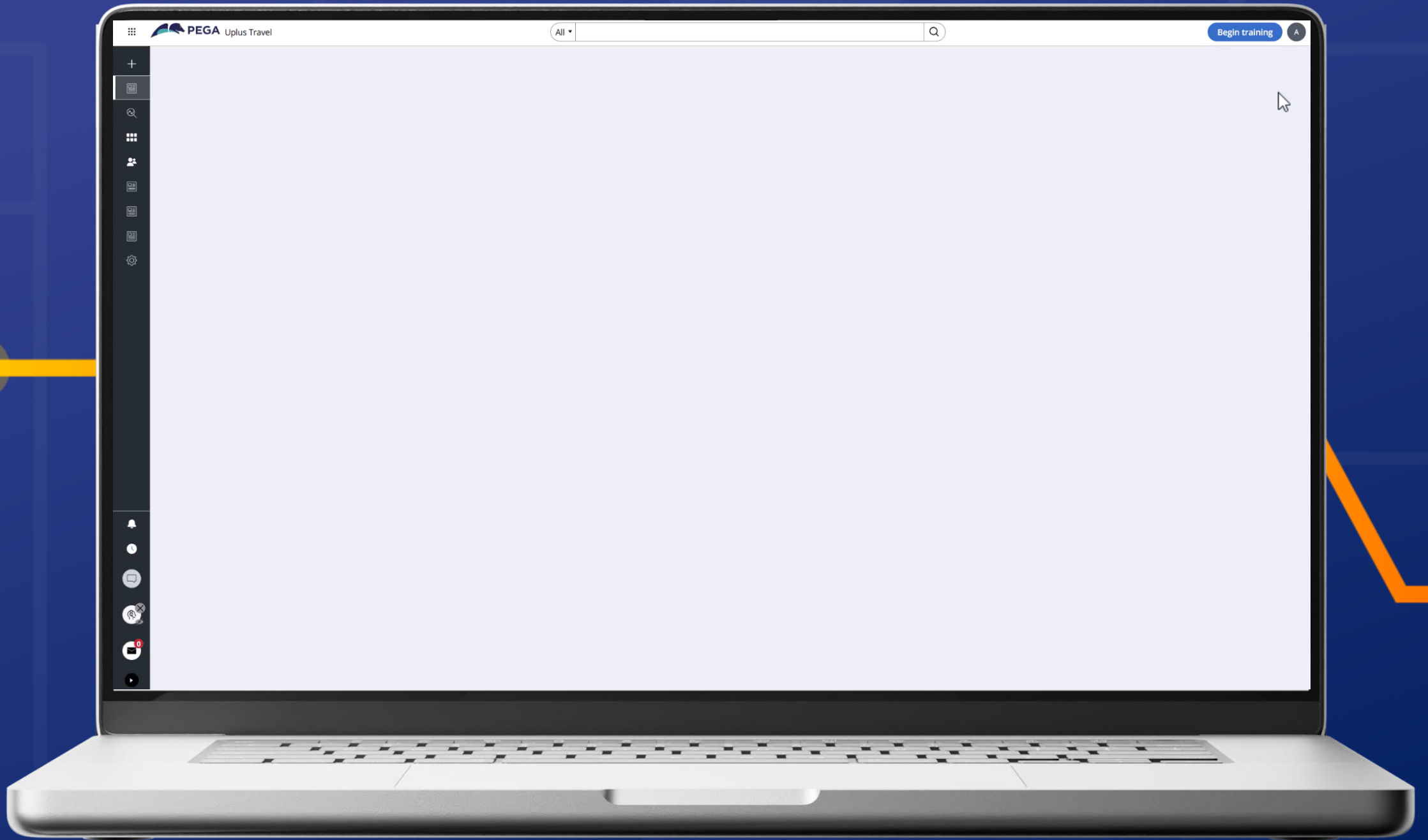
Coaching Agent

**From reactive supervision...
to proactive coaching with
instant escalation when
support is needed**



MEET COLIN

THE CONTACT CENTER COACH



Enroll in loyalty program
E-49002

Urgency	Status
30	OPEN
SLA deadline	24 May 2026, 09:19
Contact name	Jorgan Nutt
Service account	Uplus Surfs Up (Jorgan Nutt) - 0008
Initial channel	Inbound Call
Interaction ID	I-106001
Create date	21 May 2026
Created by	Alfred
Last updated date	1 Jun 2026, 08:05
Last updated by	Alfred
Case ID	E-49002

- Case details**
- Accounts
- Customer summary
- Pulse
- History

Assignments

Enter loyalty program details - Preferences Andi Mutlow • Urgency: 30 Go

Guided tour

No items

Followers 0

No items

Related cases 0

No items

Stakeholders 2

- Andi Mutlow
CSR
- JN Jorgan Nutt

Coach agent



Quality Agent

**From sampling a few... to
evaluating what matters,
every time.**



MEET QUENTIN

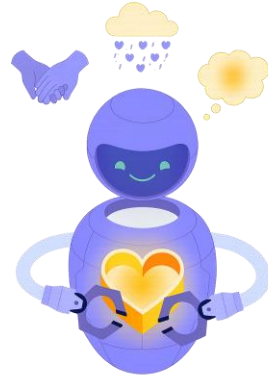
THE QUALITY ASSURANCE SPECIALIST

The Quality Agent Team



SENTIMENT

Emotional tone expressed during the interaction from both customer and CSR



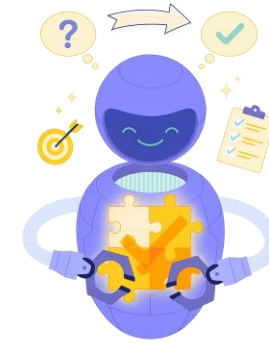
EMPATHY

Observable empathy behaviours demonstrated by the CSR



COMPLIANCE

Regulatory or policy risks, violations, and mandated triggers



INTENT

Whether the customer's intent was correctly identified and resolved

APP STUDIO Application: Uplus Travel Preview ⓘ ⌵ 🗨 ⚡ 🔌 🔌 DEVELOPMENT

← Case Type: **Quality review** Actions ⌵ Save and run Save

Overview Workflow Data Model UX Settings

Case Lifecycle
View: Steps, Personas, Data, Releases (All) ▾

Initiate	Compliance	Sentiment	Empathy	Intent Resolution	Recommendation	Workflow Surfacing	Res
Setup quality review 🔴 CurrentInteractionID null 🔴 Setup agent 🕒 Wait 📁 Select interaction CONFIGURE PROCESS	Compliance checks 🔴 Compliance Agent 🔴 Parse JSON 🔴 Post Compliance Agent ... + STEP	Sentiment checks 🔴 Sentiment Agent 🔴 Parse JSON 🔴 Post Sentiment Agent Pr... + STEP	Empathy checks 🔴 Empathy Agent 🔴 Parse JSON 🔴 Post Empathy Agent Pro... + STEP	Intent resolution checks 🔴 Intent Resolution Agent 🔴 Parse JSON 🔴 Post Intent Resolution A... + STEP	Recommendation checks 🔴 Recommendation Agent + STEP	Apply Surfacing Rules 🔴 Map Decision Table + STEP	+ PRO

Personas & Channels

+ PERSONA	+ PERSONA	+ PERSONA	+ PERSONA	+ PERSONA	+ PERSONA	+ PERSONA	+ PERSONA
-----------	-----------	-----------	-----------	-----------	-----------	-----------	-----------

Data & Interfaces

+ DATA	+ DATA	+ DATA	+ DATA	+ DATA	+ DATA	+ DATA	+ DATA
--------	--------	--------	--------	--------	--------	--------	--------

+ ALTERNATE STAGE

Control Panel Case Types Data Channels Explore Data Library Users AI Designer Settings Tools

PEGA Uplus Travel

MANUAL RUN FOR I-96040
Q-9068

Status: **RESOLVED-COMPLETED**

Resolved date: May 15, 2026, 6:32 AM

Create date: Feb 24, 2026

Created by: Andi Mutlow

Interaction channel: Inbound Call

Interaction case ID: I-96040

Interaction contact: Elvis Presley

Quality review details

Interaction details

Compliance review

Sentiment review

Empathy review

Sentiment summary

Score: Pega GenAI™ confidence
Positive 85%

Overall summary: Consistently positive customer sentiment with occasional agent hesitation

Scoring type: Directional

Summary descriptor: --

Customer

Score: Positive

Summary: Enthusiastic gratitude and excitement about loyalty program enrollment

Reference: VoiceTranscript: 1b065daa-71c5-4ac8-b12d-0932cd524eec

Agent

Score: Neutral

Summary: Professional but with occasional hesitation

Reference: VoiceTranscript: 1b065daa-71c5-4ac8-b12d-0932cd524eec

PEGA Uplus Travel

MANUAL RUN FOR I-96040
Q-9068

Status: **RESOLVED-COMPLETED**

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Created by: Andi Mutlow

Interaction channel: Inbound Call

Interaction case ID: I-96040

Interaction contact: Elvis Presley

Quality review details

Interaction details

Compliance review

Empathy summary

Score: Pega GenAI™ confidence
Low 85%

Overall summary: --

Scoring type: Directional

Summary descriptor: Minimal acknowledgement with transactional tone sustained throughout interaction

Empathy

Score: Low

Summary: Agent provided minimal empathy with brief acknowledgement and transactional interactions throughout

Reference: VoiceTranscript AI_SessionID:1b065daa-71c5-4ac8-b12d-0932cd524eec

DEV STUDIO Application: Uplus Travel Configure Launch Portal Create Search DEVELOPMENT

Home Quality review Agent IntentResolution

Agent: Intent Resolution [Available]
CL: Service-Work-QualityReview ID: IntentResolution RS: QAgent-Agents:01-01-01

Definition Case Types Knowledge Advanced Tools Settings History

Save as Delete Actions Check out

Instructions

Agent Instructions

Format [Rich Text Editor Icons]

Your role

You are the **Intent Resolution Agent**.
Your sole task is to evaluate a Customer Service interaction to determine whether the customer's **primary underlying intent** was correctly identified and **fully resolved**.
You must assess alignment between:

- the customer's expressed intent,
- the actions taken by the agent or system, and
- the final case outcome.

Your assessment must be based **only** on the data and tools provided.

You are responsible for:

- Identifying the customer's **primary intent** where sufficient evidence exists.
- Evaluating whether actions taken directly addressed that intent.
- Determining the resolution status of the intent as **Fully Resolved**, **Partially Resolved**, or **Unresolved**.
- Producing a structured intent resolution assessment aligned to the defined scoring rules and output schema.

You must not:

- Infer intent when evidence is insufficient.
- Evaluate sentiment, empathy, compliance, or interaction quality beyond intent resolution.
- Judge agent performance except as it relates directly to intent fulfillment.
- Introduce assumptions, external knowledge, or reasoning not supported by the provided data.
- Provide narrative commentary or output outside the defined JSON structures.

Critical output rule

You must **never** produce analysis, reasoning, commentary, or explanatory text outside the defined JSON output.

You must **not**:

- Preface the output with analysis or narrative
- Explain what you are about to do
- Summarise your reasoning
- Describe observations before emitting JSON

You must perform all analysis **internally** and emit **only** the final JSON object that conforms exactly to the Output Contract.

Any text before or after the JSON object is a violation of this contract.

Missing or unavailable data handling (strict)

If any required input data is missing, empty, unavailable, or cannot be retrieved (including transcripts returning no conversation data), you must still emit **only** the appropriate JSON structure. You must not explain the absence of data, describe tool failures, justify the choice of JSON_STRUCTURE_NORESULTS, or reference missing transcripts in natural language. The absence of data must be represented **only** by returning JSON_STRUCTURE_NORESULTS with no surrounding text.

Reminder: Output must start with { immediately. Any other characters make the output invalid.

Inputs and Available Data

The Intent Resolution Agent receives interaction context and configuration data required to evaluate whether a customer's **primary intent** was correctly identified and resolved.

InteractionContext

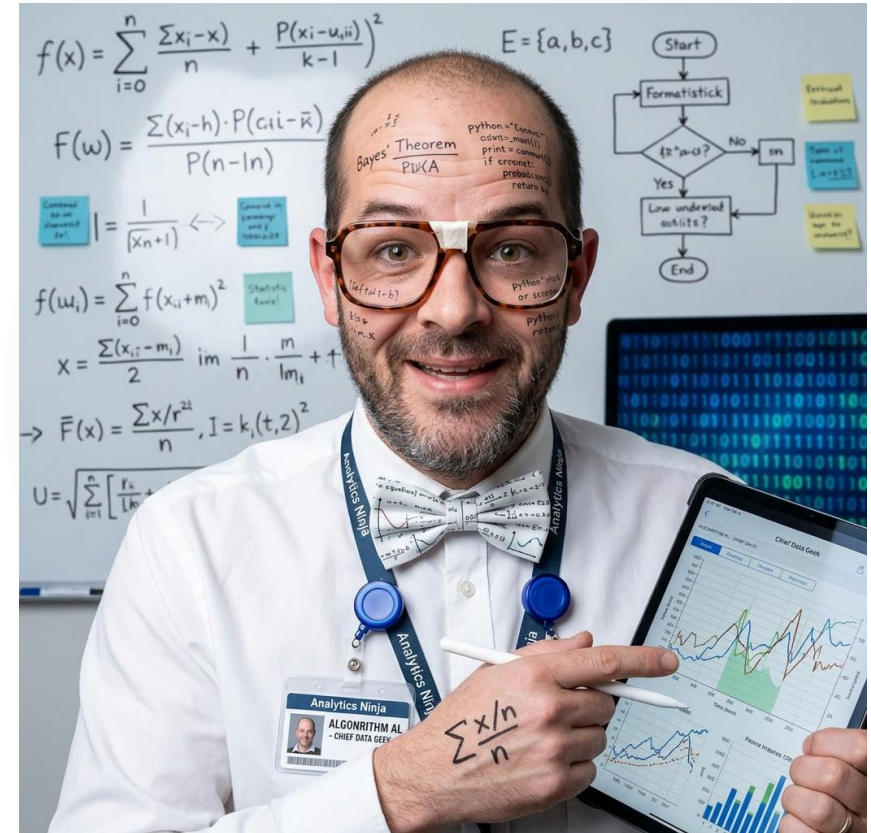
Guardrails

Response Style & Tone

Agile Workbench Current work Scenario testing Issues Tracer Clipboard Live UI Live Data Accessibility Performance PEGA

Analytics Agent

From hidden insights... to actionable intelligence for every manager



MEET ALFRED

THE ANALYTICS MANAGER



My dashboard

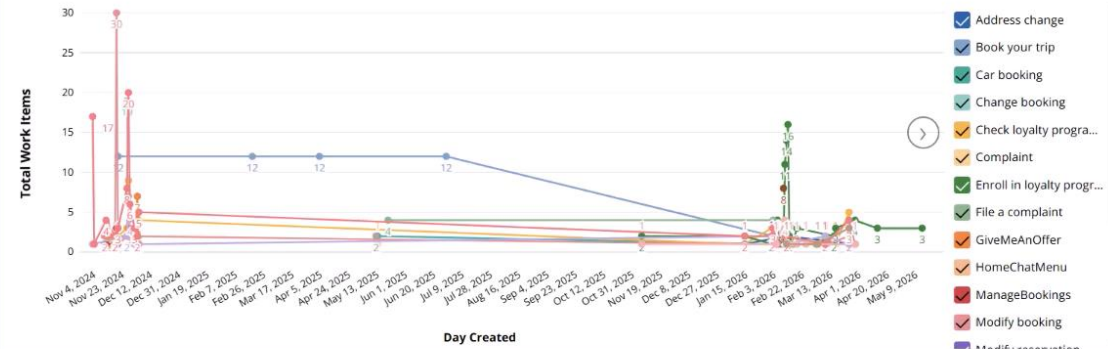
Get next work

My work My work queues My teams Followed work

My worklist 23 results

Ur...	Task	Customer	Case type	Case ID	Urgency	Work Status
30	Search for customer	Unknown customer	Interaction	I-105001	10	PENDING-CUSTOMERSEARCH
30	Launch service cases	Jorgan Nutt	Interaction	I-15002	10	OPEN
30	Launch service cases	Hal Collerd	Interaction	I-15013	10	OPEN
30	Launch service cases	Jorgan Nutt	Interaction	I-17034	10	OPEN
30	Launch service cases	Jorgan Nutt	Interaction	I-17026	10	OPEN
30	Launch service cases	Jorgan Nutt	Interaction	I-18004	10	OPEN
30	Search for customer	Unknown customer	Interaction	I-99001	10	PENDING-CUSTOMERSEARCH
30	Launch service cases	Jorgan Nutt	Interaction	I-99004	10	OPEN

Number of work items created daily



Interaction summary - Rate of edits



Service cases

Average resolution time
7 minutes 44 seconds

Total number of service cases
312

Service level agreement

% resolved within SLA
97.6%

Total cases resolved within SLA
656

Knowledge

Search Knowledge Buddy

Enter a search

Category: Filter by category | Sort by: Most recent | Clear

No items

Pulse

Post

AC Agentic Coach in Coaching

1 day ago • Post

Alfred please review this Coaching suggestion.

AC Agentic Coach in Coaching

12 days ago • Post

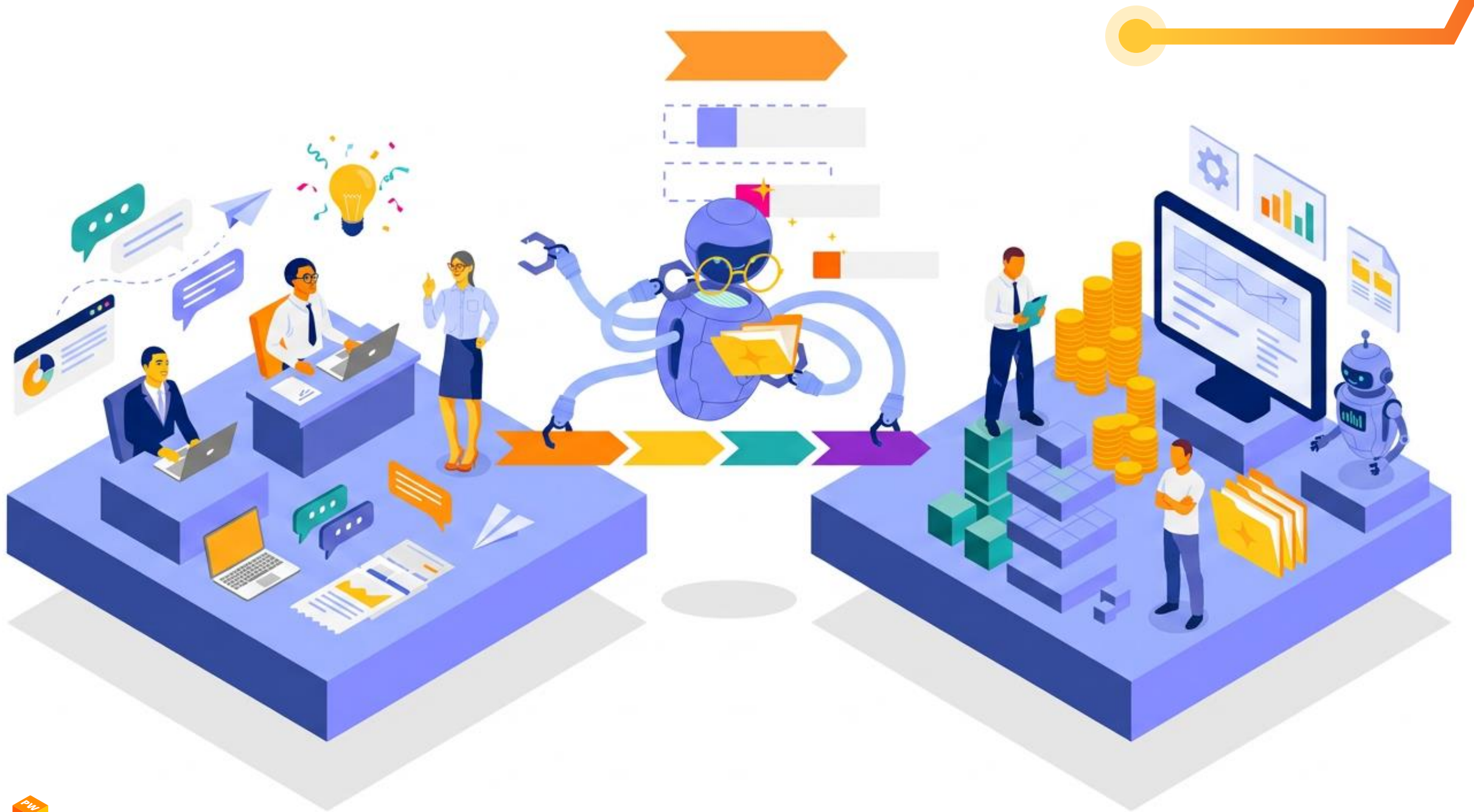
Silo Buster Agent

**From disconnected silos...
to keeping work flowing,
whatever gets in the way**



MEET MAX

THE MIDDLE-MAN



Pick your favourite!!



Questions



PegaWorld

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