

# Accelerating the Journey to Intelligent Automation

Beyond the tactical RPA Hype and into DPA reality

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Pega Infinity™

# Q & A





BAC KWARD  
DAY





**Why are people getting RPA backwards?**



## The “promise” of RPA ;

- Automate tedious tasks
- Return hours to the business
- Generate rapid return on investment
- Be easy to build and deploy
- Low IT involvement
- Does not rely on API's
- Non-invasive
- Reduction in errors
- On-ramp to Digital Transformation



# RPA is the platform for Intelligent Automation - **NOT**

**By 2021, RPA will be obsolete**

**Execs struggle to see value**

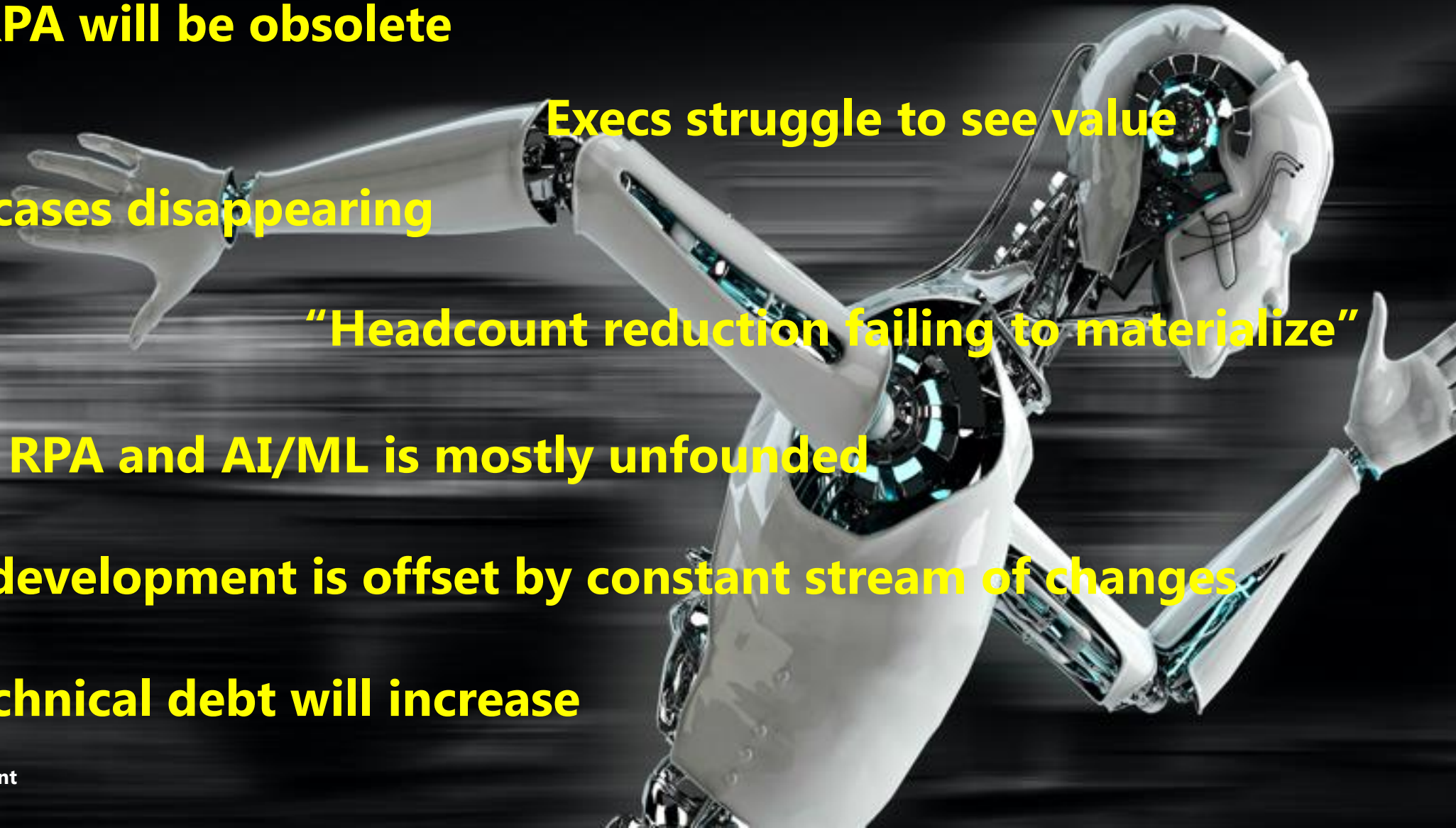
**Business cases disappearing**

**“Headcount reduction failing to materialize”**

**Hype around RPA and AI/ML is mostly unfounded**

**Ease of development is offset by constant stream of changes**

**Level of technical debt will increase**



30-50%

**RPA projects fail.**

*Get Ready for Robots, EY, 2016*

90%

**Don't think they're  
maximizing  
capabilities of RPA**

*Business Case Planning for Robotic Process  
Automation, Infosys, 2018*

4%

**RPA Deployments Scale\***

*\*50 or more bots  
The robots are ready. Are you? Deloitte Global RPA Survey, 2018*



# Pega RPA at scale – use cases

## RPA Attended at Scale

Industry	How Pega is used (example)	Client and Scale
Telco	Reduce call times, eliminate manual tasks, rework and errors	<b>Australian Telco</b> - <b>35,000</b> desktop robotics deployed to every call center agent desktop
Financial Services	Front and middle office, speeding customer and employee facing processes	<b>Global Bank</b> - <b>20,000</b> desktop licenses deployed live in 18 months

## RPA Listen bots (Workforce Intelligence)

Outsourcer	Identify wasted hours on idle time and unnecessary steps	<b>Financial Services</b> - improved productivity by 10-15% across the workforce
Healthcare	Accurately quantify and improve over 500 work standards	<b>Provider</b> – <b>1750</b> desktop licenses – ROI across the workforce before any automation
Financial Services	Inquire into account info	<b>Credit Union</b> – <b>10,000</b> WFI seats - identify processes ripe for Pega Digital Process Automation platform.

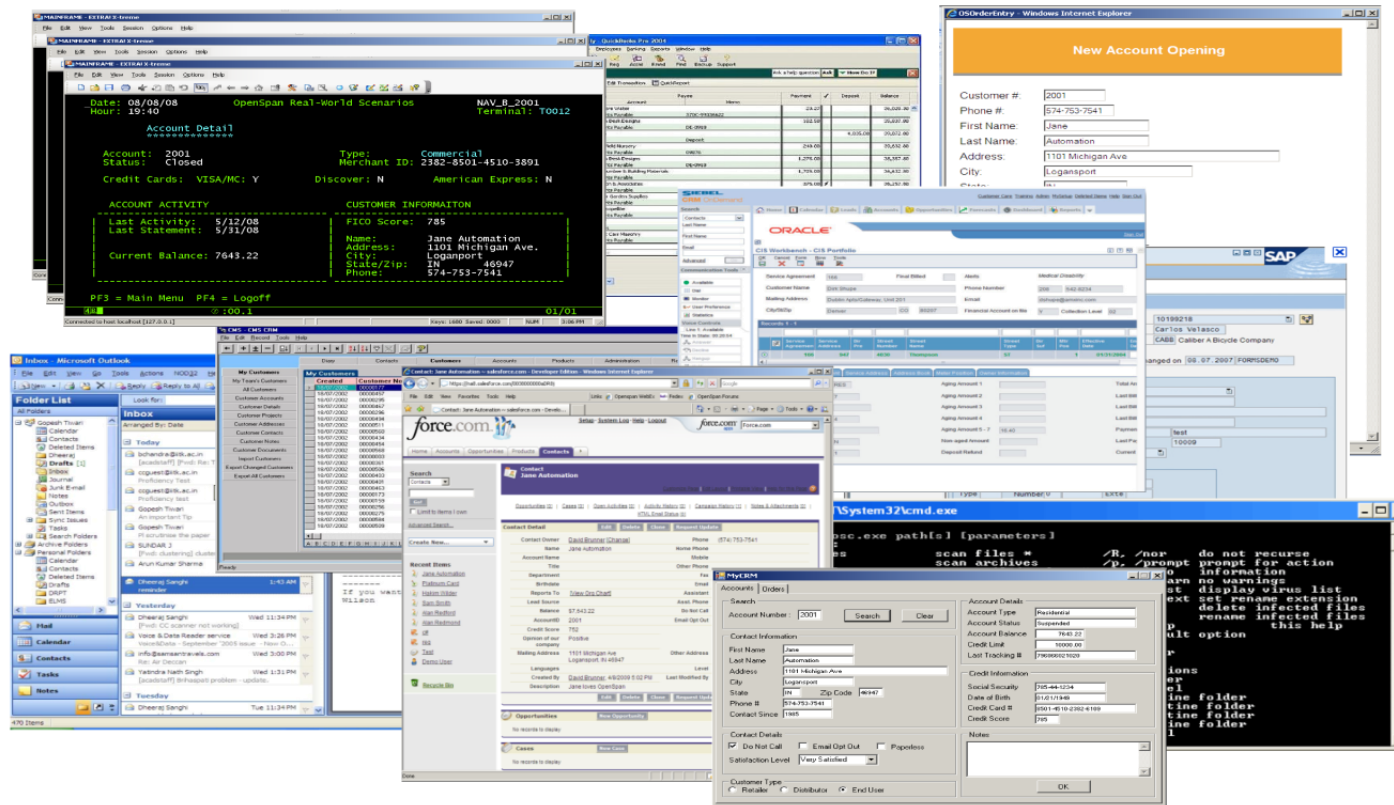
## RPA Unattended

Financial services	Replace human rote processes with Robotics and Pega Platform	<b>US Bank</b> over <b>200</b> RPA unattended bots deployed alongside <b>2000</b> RPA attended bots. Reduced tasks by 50%. Goal is to build every robot with a goal to replace with Intelligent Automation
Utilities	Eliminate rote work in back office finance	<b>West Coast Electricity</b> – Automated 100 FTE's worth of work and reduced volume of manual tasks by 30%



# What is RPA trying to solve?

*Many tasks remain manual – Desktop Users lost in a maze of applications*



- Cluttered desktop results in long process and call times – and expense
- 3rd party and old legacy applications can be closed to integration
- Cost and delays building API's inhibit process optimization and digital acceleration
- Biz need to drive more throughout at same cost (if they can't change)





19072



# Building your automation in silos





**STOP**

# Coding the old way (now 50+ years old)



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CT FUNCTION REVERSE(STR-1)  
TALLYING WS-LEN FOR LEADING SPACES  
ITE WS-LEN = LENGTH OF STR-1 - WS-LEN  
AY WS-LEN.  
1 TO I.  
WS-LEN TO J.  
IRM REV-PARA WS-LEN TIMES.  
AY STR-1.  
AY STR-2.  
X.  
STR-1(::1) TO STR-2(::1).  
ACT 1 FROM J.  
ADD 1 TO I.
```

```
</tr>  
<tr>  
  <td rowspan="2" height="18">  
    <div align="right">  
    <CENTER><table width="680" b<br> bgcolor="#FFFF99">  
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        <td height="20">  
          <div align="center"><br> size="4">  
        </td>  
        <td width="34%" heigh<br> <td width="45%" heig<br> <div align="left"><br> --s-serif">
```



```
public static void main (String[] args) {  
    BufferedReader file_reader = new<br>    BufferedReader (new InputStreamReader<br>    (in));  
    String text;  
    while ((text=file_reader.readLine(<br>    file_contents)).endsWith()) System.out<br>    println(text);  
}
```

# Productivity tools are *good but not the answer*



Not built for managing data or processes



Limited data access controls



Restricted to e-mail based workflows



Scripts/Macros

**Wrapping old legacy automation with RPA is a bridge too far**





**DIGITAL**

**REVOLUTION**



**Intelligent Automation** is the  
coordinating the world (robot) and  
work (robot) and long running  
processes.

Gartner 2019, RPA Magic Quadrant





# Intelligent Automation platforms change the game

Gartner



**iBPMs Suite**

FORRESTER®



**Digital Process Automation**

FORRESTER®



**Real-Time Decisions & AI**

Gartner



**End-to-End Work Management**

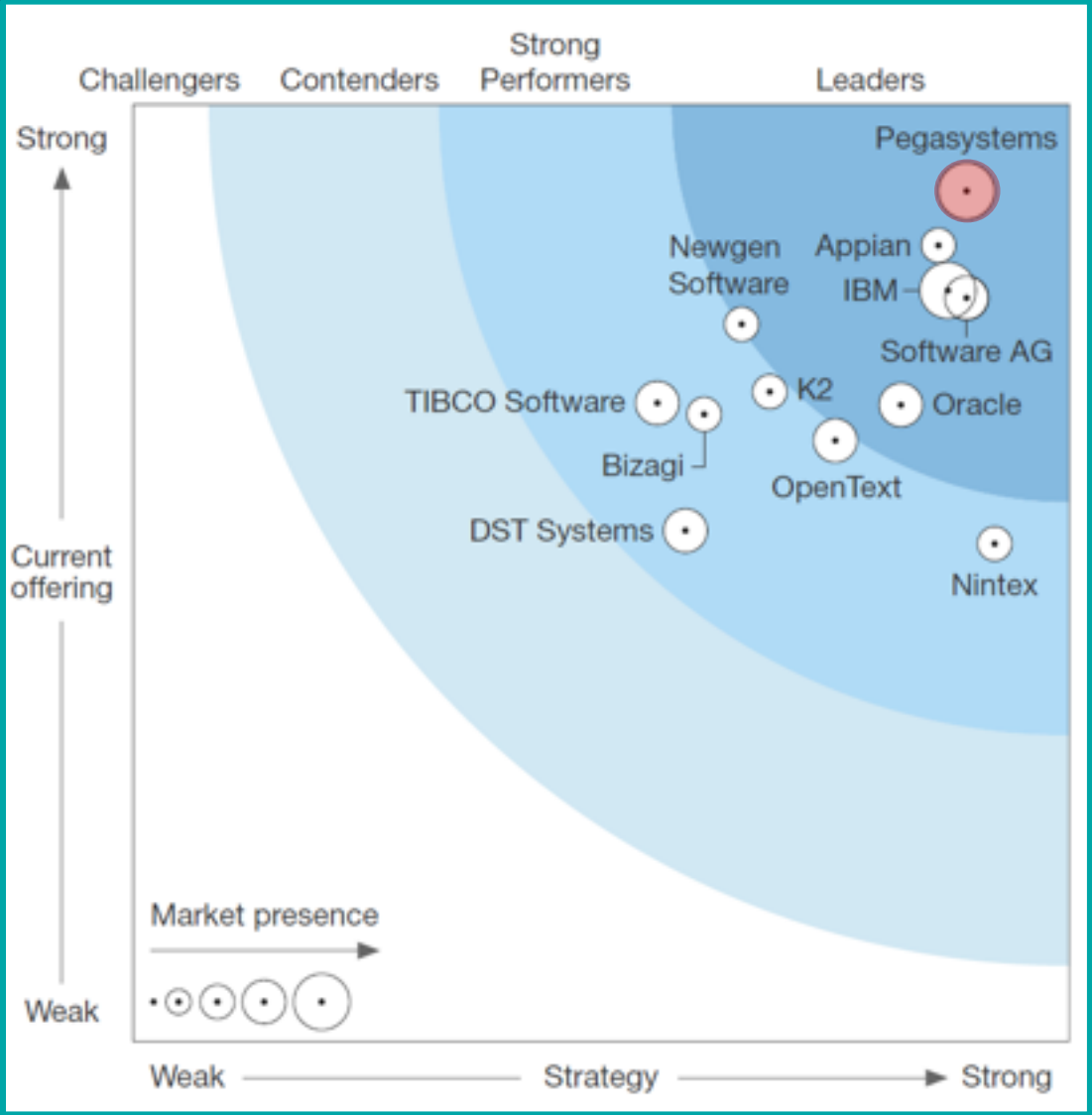
“The highest reference customer rating for customer usability. The best ability to build, maintain, and change complex cases. The Pega Platform™ offers one of the most comprehensive sets of features in the market.”

**Gartner**

# INTELLIGENT AUTOMATION is a platform of many parts

- Collaborative modeling
- Smart forms and user experience
- Business rules/modeling
- Robotic process automation**
- Dynamic case management
- Document support
- Process and flow design
- Low-code/no-code
- Mobile engagement
- API support
- Data virtualization

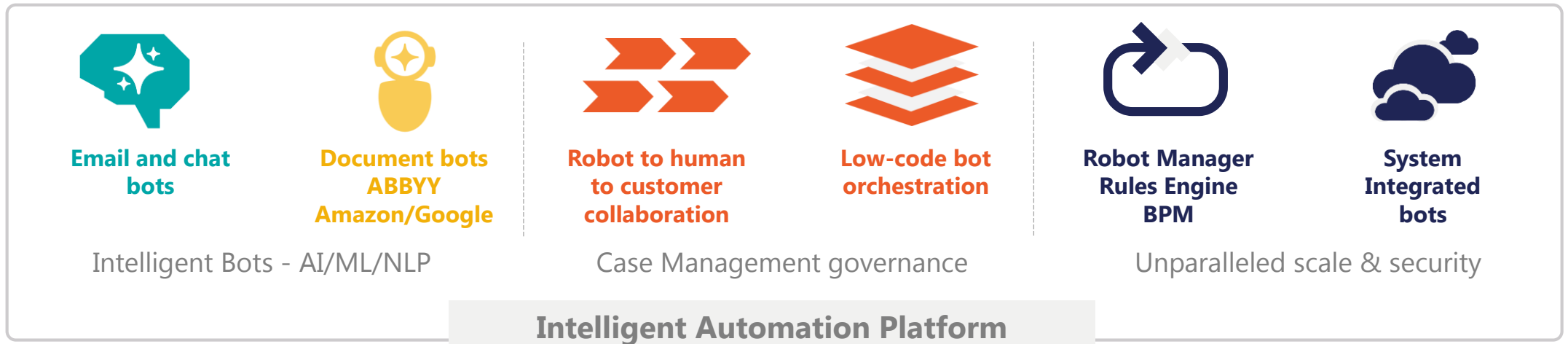
- Customer journey metrics
- IoT support
- Deployment options
- Analytics
- Integrations
- Guardrails and governance
- Life-cycle management
- Enterprise scalability
- Artificial intelligence
- Digital workplace





# Pega Robotic Automation

Fully Integrated into Pega Infinity™

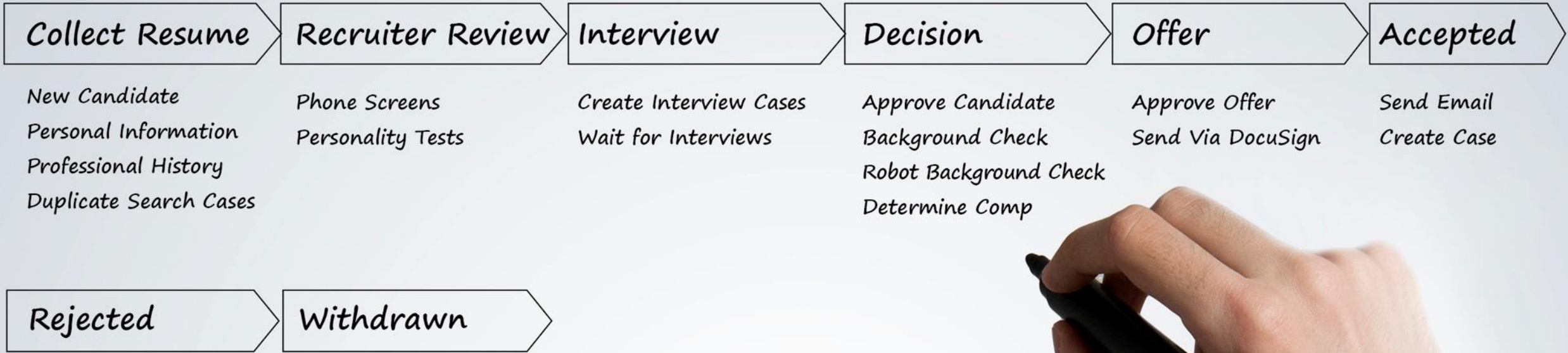




**GO!!!**



# From case management and low-code to application in days



# With Pega low-code

- No-code, visual metaphor allowing business to define outcomes.
- Unifies the key aspects of work including processes, decisions, workflows, SLA, and worker in a singular interface.
- **Assign work to humans, RPA bots, and systems.**
- Embed meaningful AI and ML at the start, middle or end
- Automation at SCALE

The screenshot displays the Pega App Studio interface for a 'Job Applicant' application. The main workspace shows a 'Case life cycle' workflow with five stages: 1. Collect Resume, 2. Recruiter Review, 3. Interview, 4. Decision, and 5. Offer. Each stage contains specific tasks and actions. A 'Life cycle' panel is visible at the top right. On the right side, a 'Step' configuration panel is open, showing the 'Goal & deadline' tab. This panel allows for defining completion times, including a goal of 1 day and 00:00:00, and options to notify assignees or managers with a custom message. An arrow points from the text below to the 'Message' field in the SLA configuration panel.

Supports complex SLA rules, including goal, deadline and past deadline actions.



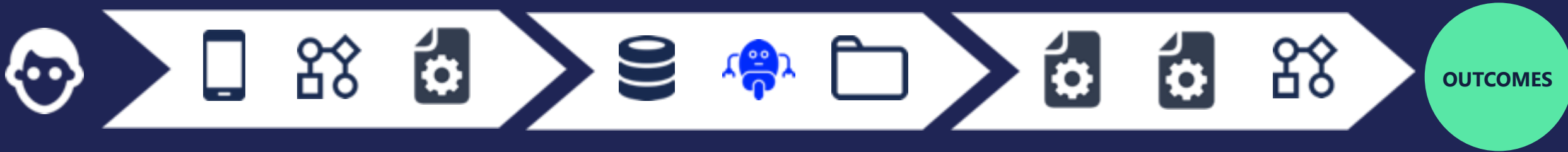
# Leverage RPA bots to accelerate your Intelligent Automation strategy



“Taking an end-to-end view of the outcome...is better than applying a robotic Band-Aid to a particular pain point.”

McKinsey&Company

# Replace RPA bots with enterprise integration when applicable



“Taking an end-to-end view of the outcome...is better than applying a robotic Band-Aid to a particular pain point.”

McKinsey&Company



# A proven path to get you to value fast and scale without limits in 30 days.

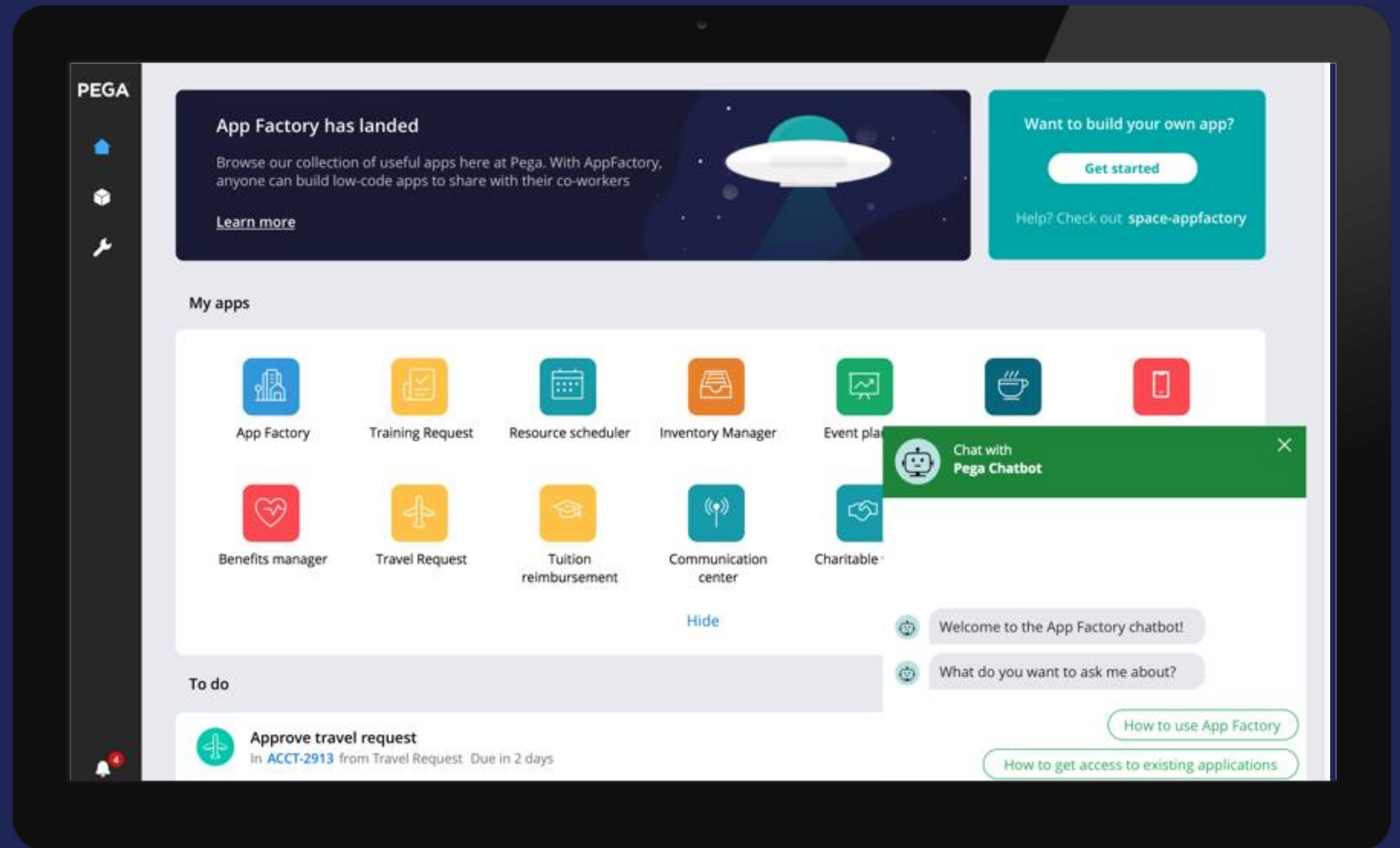
- Rapid Delivery delivers rapid ROI.
- 40,000+ certified professionals globally.
- Agile tools and DevOps baked in.
- Global ecosystem of technology and delivery partners.



# Pega Enterprise Low-Code 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 the Pega Community**  
<https://community.pega.com/low-code-factory>



# The Pega Infinity™ low-code approach



## Builder / Maker

Actively builds and designs apps  
Seamless communication with IT



## Professional Developer

Achieves greater productivity  
Freed to focus on higher value tasks



## Enterprise IT

Supports a platform for innovation  
Avoids risks to business

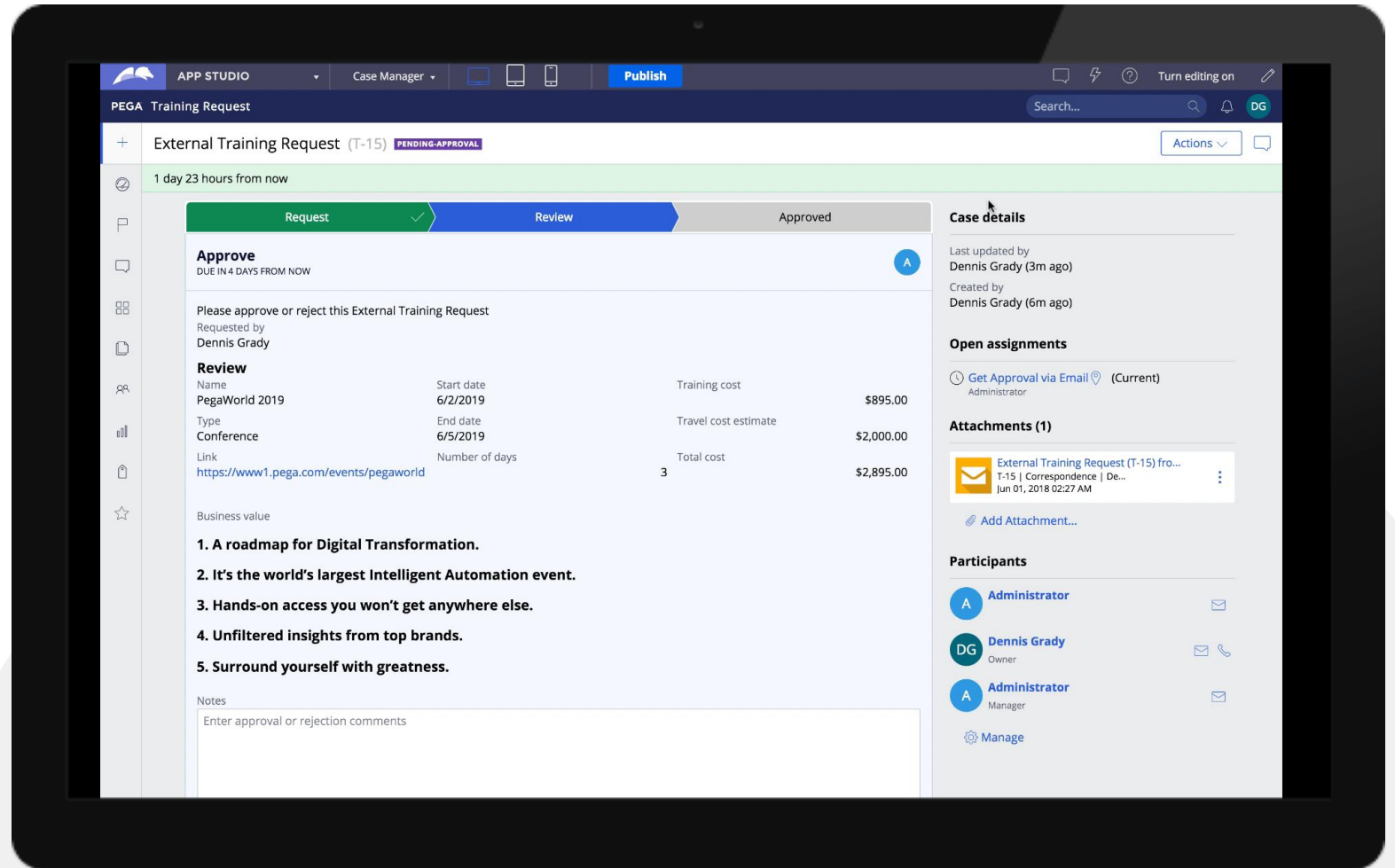


# Real-time, continuous collaboration

With **Agile Workbench**, **Agile Studio**, and **Directly Capture Objectives (DCO)**



- In-app editing that breaks silos between IT and business.
- Quickly iterate by bringing business closer to app development.
- Plan, manage, and execute quickly with a continuous experience across project management and development.

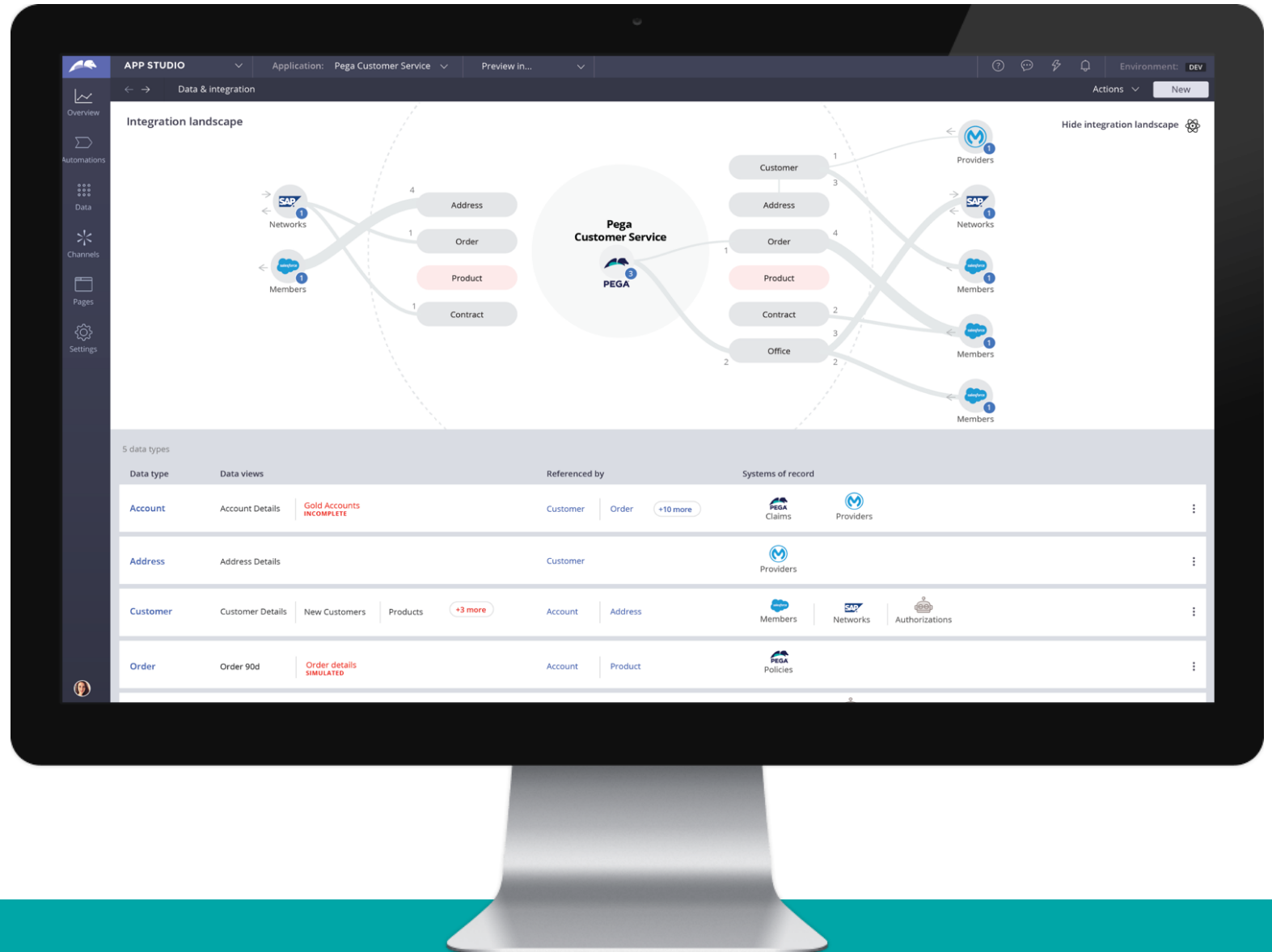




# Visual Integration without no-code

With **Integration Designer**

- Quickly and easily access data across all back-end systems.
- Live apps pull data in real time, on-demand, and with no back-end storage reconfiguration needed.
- Data virtualization layer decouples data from applications.



# Next Best Action low-code designer

The screenshot displays the PEGA Marketing Next-Best-Action Designer interface. The top navigation bar includes the PEGA logo, the text "Marketing", a search bar, and notification icons. The main header is "Next-Best-Action Designer".

Five main functional areas are visible:

- Taxonomy:** Define business structure and customer states.
- Engagement policy:** Define engagement criteria for each group of actions. This area is currently active.
- Constraints:** Set constraints, contact policy limits, and controls.
- Arbitration:** Define AI behaviors and controls.
- Channels:** Enable channels and define triggers.

The left sidebar contains a navigation menu with icons for home, search, notifications, and user profile. The main workspace is divided into two panes:

- Business structure:** A tree view showing "All groups" and "Collections" (Pre-Collection, Post-Collection, Payment Plans), "CreditRisk" (Proactive, Reactive), "Service" (Account, Customer), and "Upsell".
- Upsell / CreditCards:** The active configuration pane, showing it was edited 18 days ago by Chetan Buddi Analyst. It includes "Save", "Delete", and "Actions" buttons. A tooltip "Add engagement policy (advanced)" is visible.

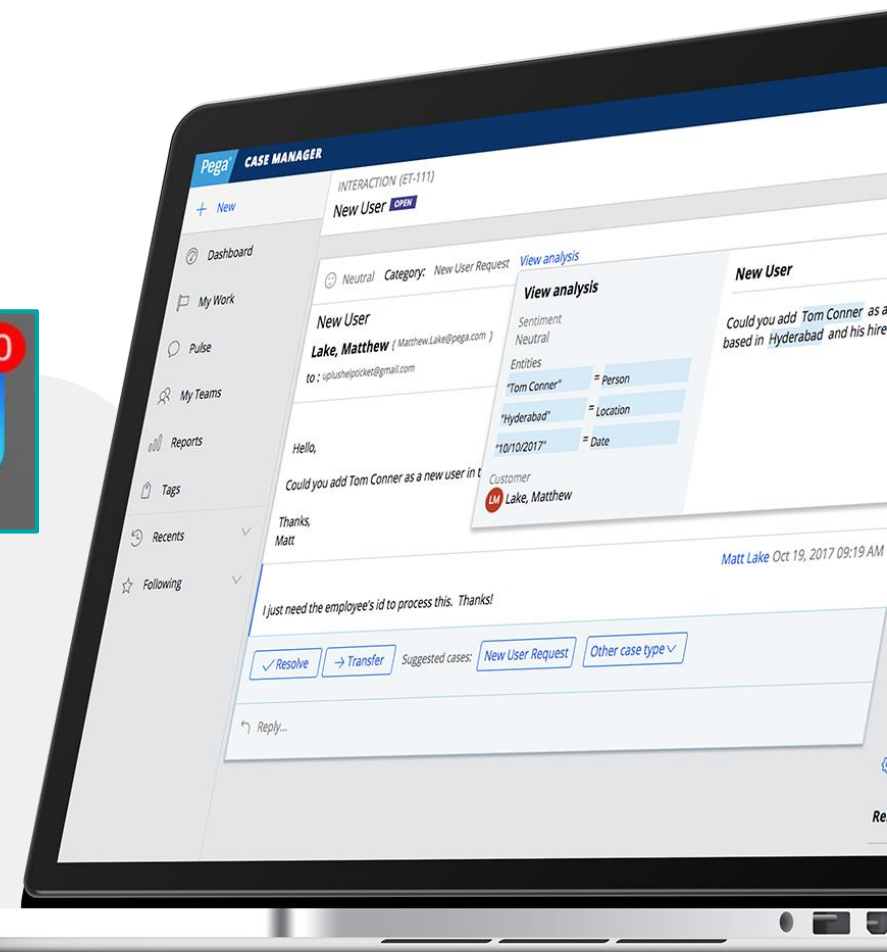
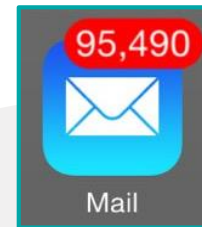
The "Engagement policy" configuration for "Upsell / CreditCards" includes:

- Eligibility:** A group of rules connected by "and".
  - Rule 1: Action is active (with "Select values" and a plus icon).
  - Rule 2: Action not declined in last 30 days (with "Select values", plus, and trash icons).
  - Rule 3: Product is not currently owned (with "Select values", plus, and trash icons).
- Relevancy:** A section with a plus icon and a help icon.
- Suitability:** A section with a plus icon and a help icon.
- Contact policy:** A section with a plus icon and a help icon.



# Email - a leading "manual" workforce tool

- Email is still the most used and trusted-enterprise channel.
- Over 3.7 billion email users, rising to 4.1 billion in 2021.
- Over 125 emails sent/received by business users everyday.
- Average person takes 64 seconds to recover from one email.



# Email bots – automated out of the box

## Breathe “automation” life into emails

- Add an inbound email channel with a few clicks
- Automated response to email in seconds – the right way
- Always-on NLP read emails
  - You set the SLA's
  - You set bots automation determination percentage
- Artificial intelligence makes triaging extremely fast.
  - Automates case routing
  - Maps entities to fields
  - NLP and text analysis viewer for manual validation
  - Fully automate or recommend replies

PEGA UPlus Insurance

Subject	Fr
Vehicle quote needed for a brand new Hyundai Verna SX(O) AT	Ra
Moving to new location. Need to change my address.	Ra
Service issue	Tiv
Quotation request	Tiv
Address Change request	Tiv

✓ Resolve → Transfer

(ET-245)

### Quotation request

Tiwari, Sindhu (Sindhu.Tiwari@in.pega.com) TO : mydemochannel01@gmail.com

Wed Jun 13, 2018 01:34 AM

[Reply...](#) Other replies ▾

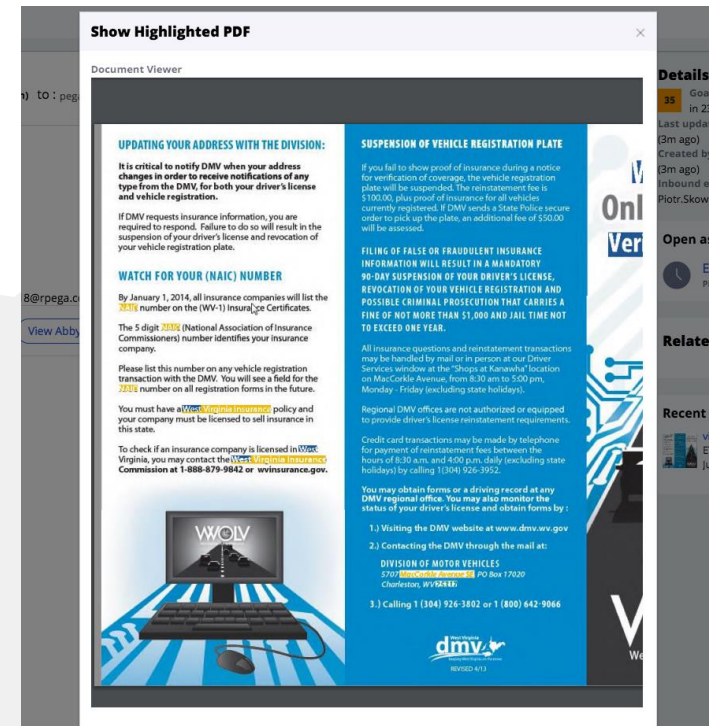
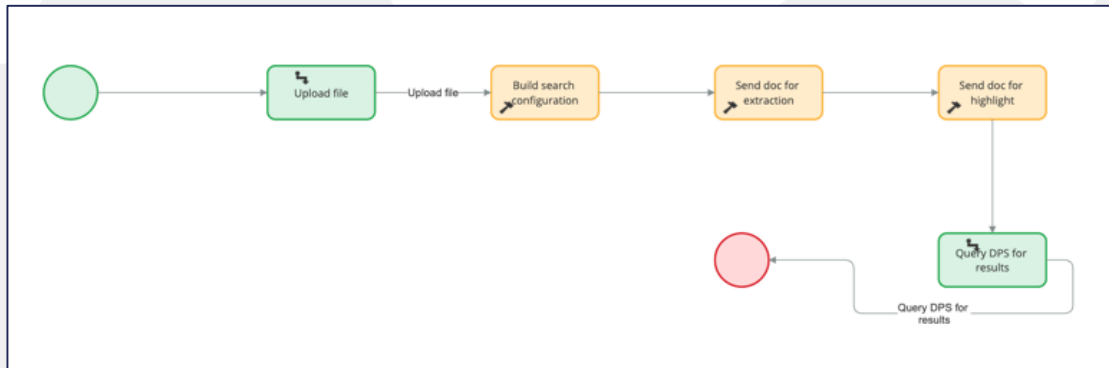
Hi,  
My name is Peter. I've a vehicle for which I would like to need quotation, here are the details  
VIN - 1FTDX1765VKD60AB1  
Make - Ford  
Model - F150  
Color - White  
Year of manufacture : 2001  
Mileage - 226,477  
I appreciate your prompt response.

Thanks,  
Peter farrel

# Document Bots

One service to serve all needs

- **Optical Character Recognition** and **Highlighting** capabilities
- Extract text from pictures and highlight entities (OOTB integration with **Email bot** channels)
- Available to **process flows for enhanced automation**
- structured documents and form analysis
- On-premise, on the server, on the client or on the cloud (multi-tenant)

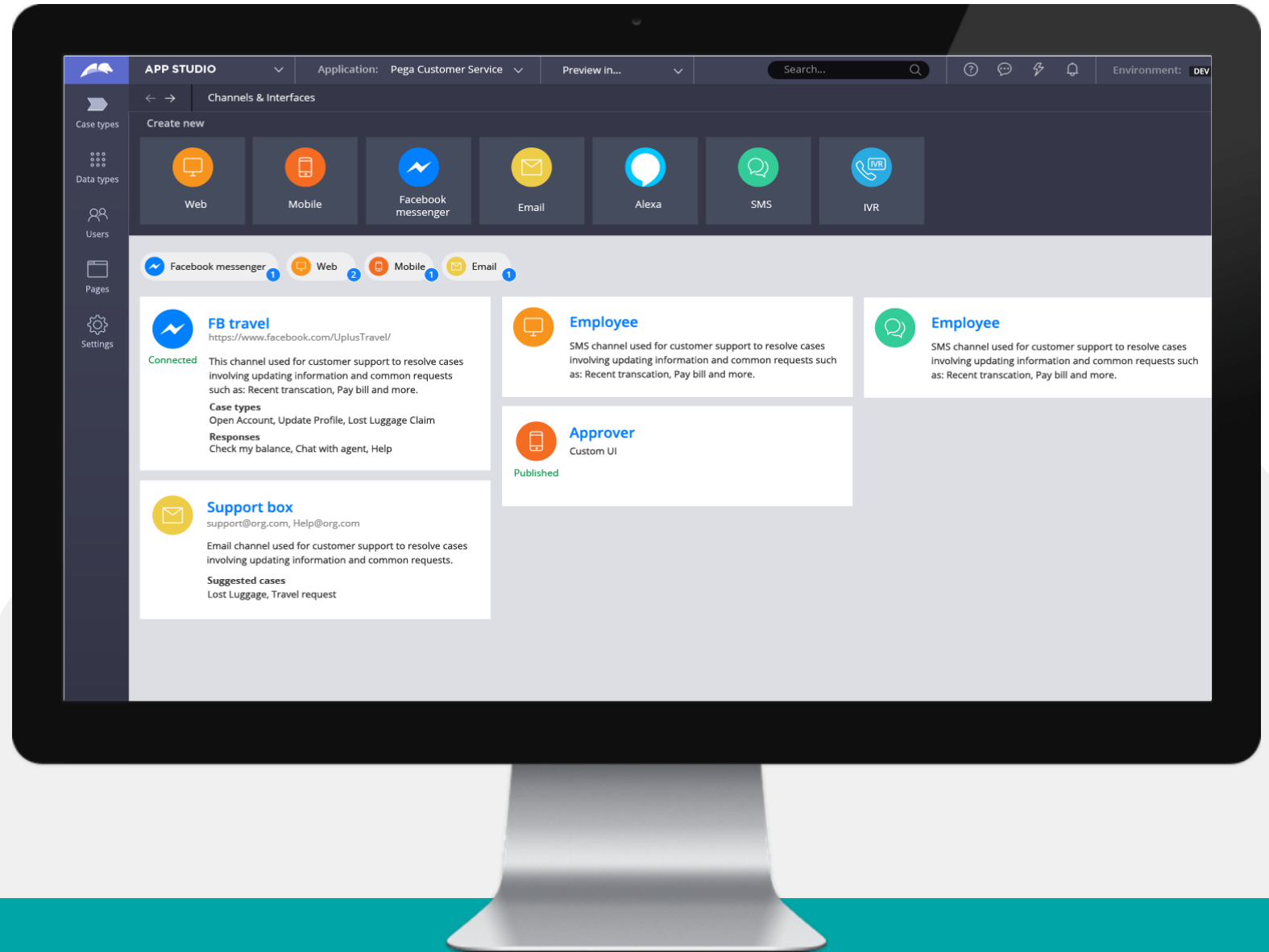




# Limitless potential to connect and integrate

With **Mashup, APIs, and Pega Market Place**

- Extend your apps to multiple channels
- Join, contribute or benefit from shared resources
- Easily connect your apps to external sources.
- Integrate your apps to your critical business systems
- REAL RE-USABILITY



# Go from idea to app in minutes with Pega

- Learn more on the Pega Community [community.pega.com/low-code-factory](https://community.pega.com/low-code-factory)
- Sign up for a free trial: [Pega.com/platform](https://Pega.com/platform)

Build apps **12x faster** with the broadest selection of low-code app dev capabilities





**PEGA<sup>®</sup>**

Build for Change<sup>®</sup>