



# Up, Up, and Away: Unleashing the Superpowers of Pega Infinity

9 October 2019 | Mahesh Swamy and Wilson Ta

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Customer  
Engagement  
Summit  
Melbourne





**DX** HERO™



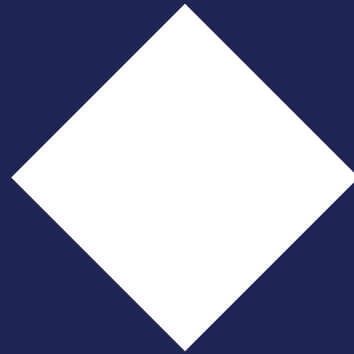
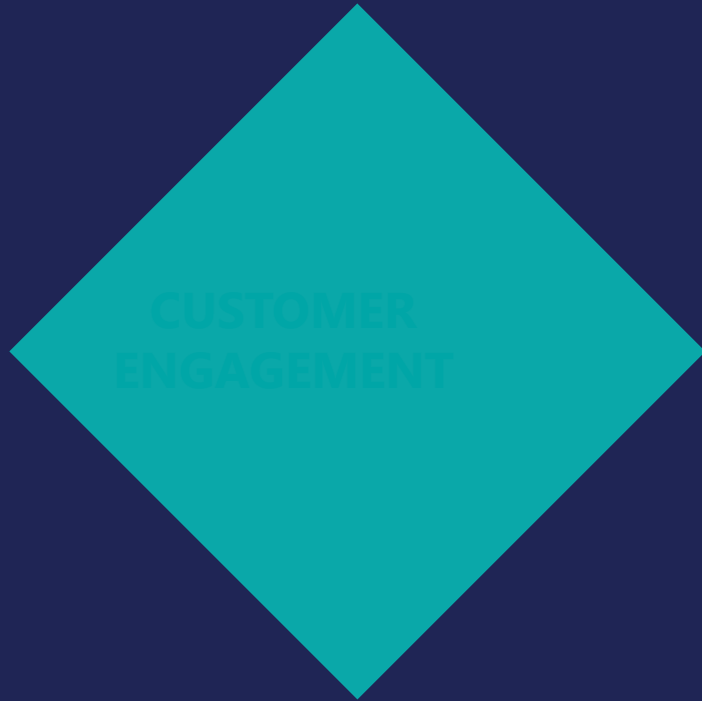












Pega Infinity™



CUSTOMER  
ENGAGEMENT

FORRESTER



Gartner



DIGITAL PROCESS  
AUTOMATION

Pega Infinity™



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**

# NEWS

## NAB sets software bots loose on its email avalanche

By Ry Crozier  
Mar 21 2019  
12:30PM

Automatically extracting action items in 70 percent of cases.

NAB has let 19 "email listeners" loose in eight of its business units since July last year, automatically triaging tens of thousands of emails in a bid to improve customer service.

The bank is one of the first adopters in the world of Pega Intelligent Virtual Assistant (IVA) software, which is pitched as a bot that can "read, route, and respond to email".

IVA is considered the "star" of the NAB Universal Workflow or NUW, which is essentially a framework of reusable components that units and teams from across the bank can use to digitise processes to improve customer service.

Pega IVA uses natural language processing (NLP) to pull the action item out of emails and then direct it to the right place within the bank.

### RELATED ARTICLES

NAB scales up next best conversation to 3500 bankers

NAB pushes fast alpha of its new CRM hard to move off Siebel, Oracle

NAB commits to massive CRM transformation

NAB's shift to digital gets personal

HAND'S BEST FRIEND

“... automatically triaging tens of thousands of emails”

“34,000 emails... have already been passed through”

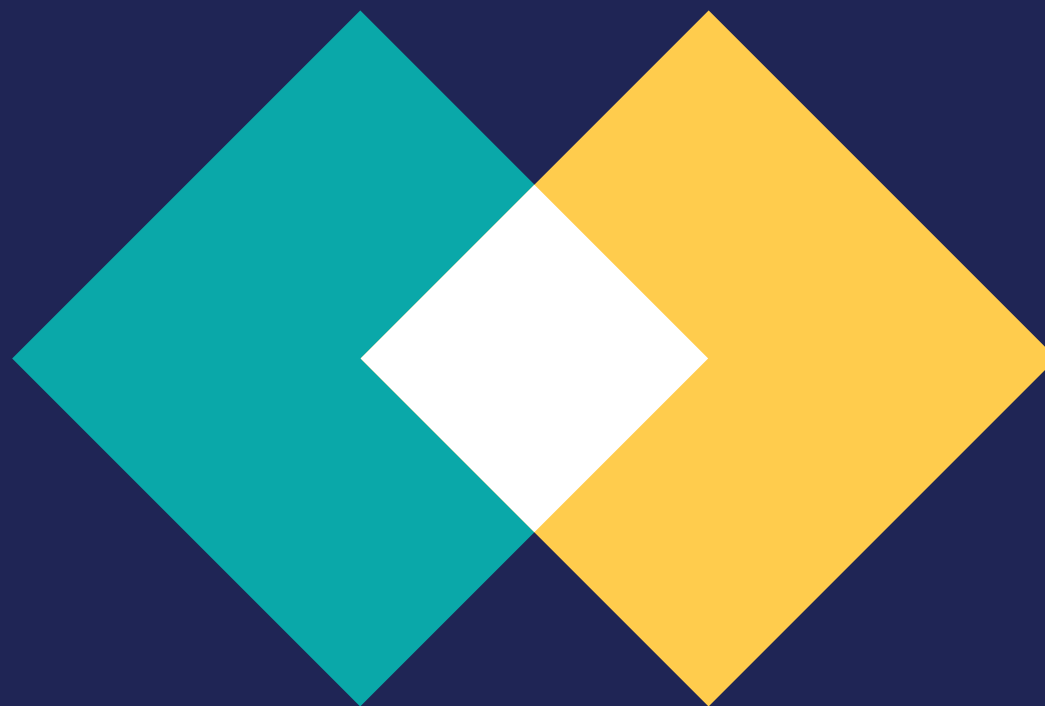


U+ Bank Notifications

“... 75 percent auto classification rate”



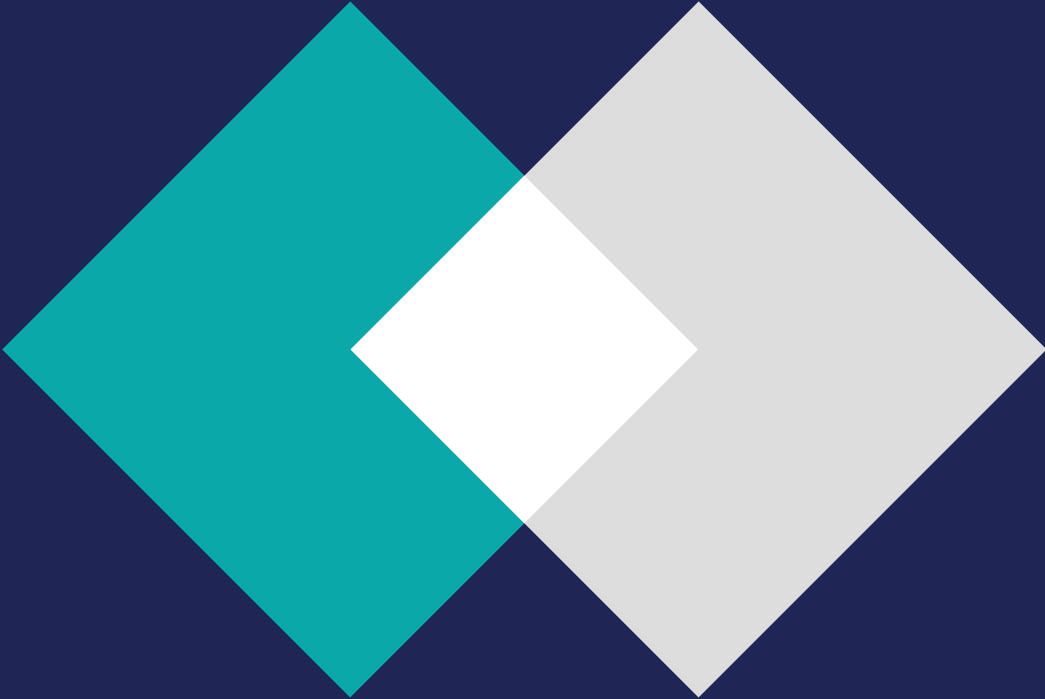
**CUSTOMER  
ENGAGEMENT**



**DIGITAL PROCESS  
AUTOMATION**

**Pega Infinity™**

**CUSTOMER  
ENGAGEMENT**



Pega Infinity™



# Next Best Action

PEGA Marketing Search

**Next-Best-Action Designer** Help

**Taxonomy**  
Define your Next-Best-Action business structures

**Constraints**  
Set outbound channel limits and suppression policies

**Engagement policy** EDITING  
Capture business rules which define when actions are appropriate

**Arbitration**  
Prioritize actions based on customer relevance & business priority

**Channels**  
Activate the channels and triggers that invoke Next-Best-Action

**Business structure**

- Retention
- Savings
- Home Loans
- Cards
- Service
- Onboarding
- Compliance
- Alerts
- Loyalty
- Savings
- Cards

**Sales / Cards** DemoBank-Artifacts: 01-01-01 Edited less than a minute ago by wilson.ta

**Engagement policy**

**E Eligibility** Group ANDs

Income  is greater than  50000

and

Arrears\_Prop  is less than  8

or

Churn\_Score  is less than  700

**A Applicability**

**S Suitability**

# Next Best Action

PEGA Marketing Search

**Next-Best-Action Designer** Help

- Taxonomy  
Define your Next-Best-Action business structures
- Constraints  
Set outbound channel limits and suppression policies
- Engagement policy** EDITING  
Capture business rules which define when actions are appropriate
- Arbitration  
Prioritize actions based on customer relevance & business priority
- Channels  
Activate the channels and triggers that invoke Next-Best-Action

Business structure	Sale
Retention	
Savings	
Home Loans	
Cards	
Service	
Onboarding	
Compliance	
Alerts	
Loyalty	
Savings	
Cards	

Add engagement policy (advanced)



# Next Best Action

PEGA Marketing Search

**Next-Best-Action Designer** Help

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**Engagement policy**

**E Eligibility**

is greater than

and

is less than

or

is less than

**A Applicability**

**S Suitability**



# Welcome, Clark Kent!



### Frequent Flyer Credit Card

Always flying without a plane? Earn some miles for when you feel like watching a movie while getting there.

[Learn more](#)



### 2% Cash Back on Capes

Fighting the same bad guy over and over? Don't always wear the same cape.

[Learn more](#)



### Great Mortgage Rates for Smallville Homes

Circle of superhero friends growing? Time to upgrade your SuperPad!

[Learn more](#)





# Welcome, Diana Prince!



### Corral High Interest Rates

Carry another lasso in your pocket.

[Learn more](#)



### 2% Cash Back on Cuff Bracelets

Too many bracelets? No such thing!

[Learn more](#)

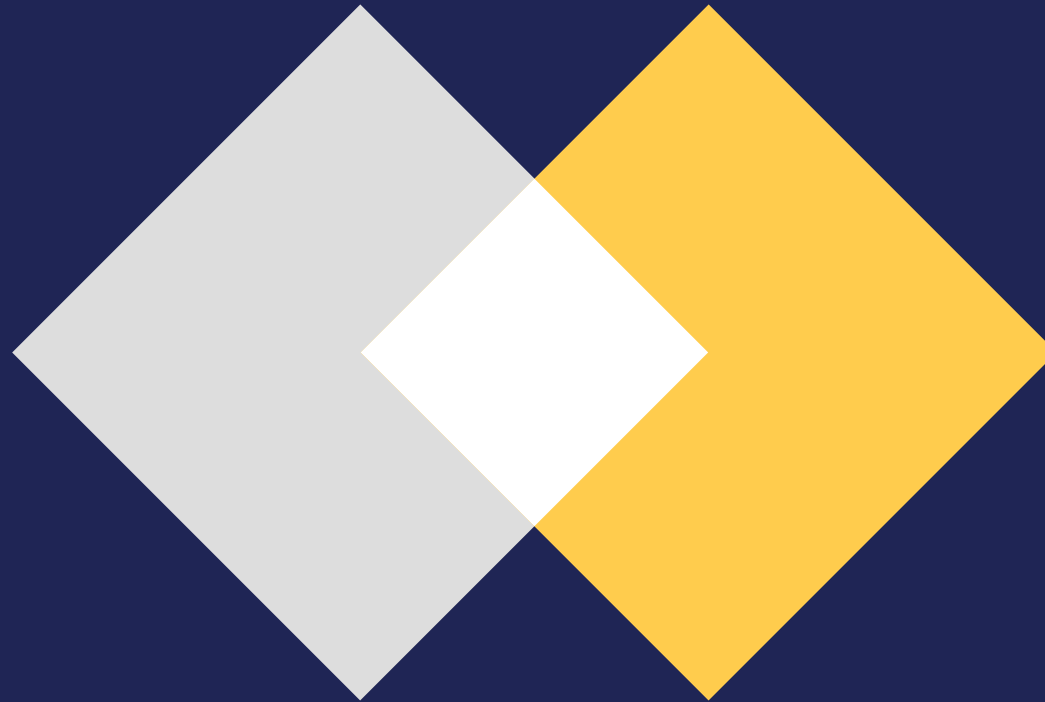


### Great Mortgage Rates for Amazonian Homes

Why not get an investment property in paradise?

[Learn more](#)

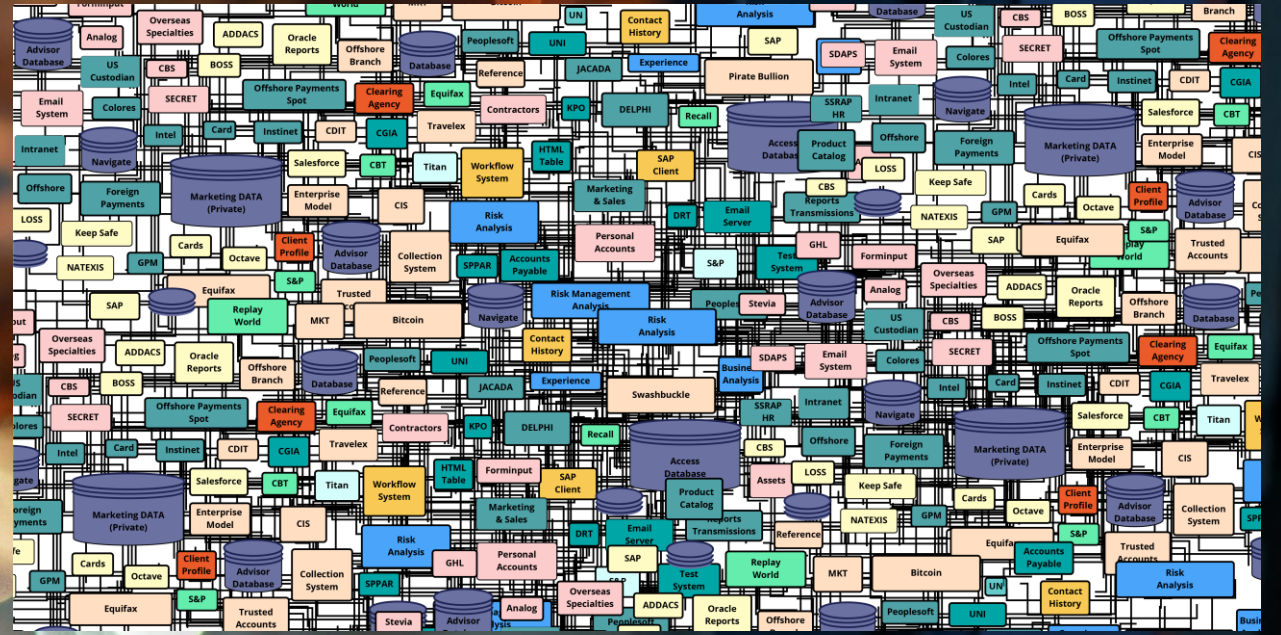




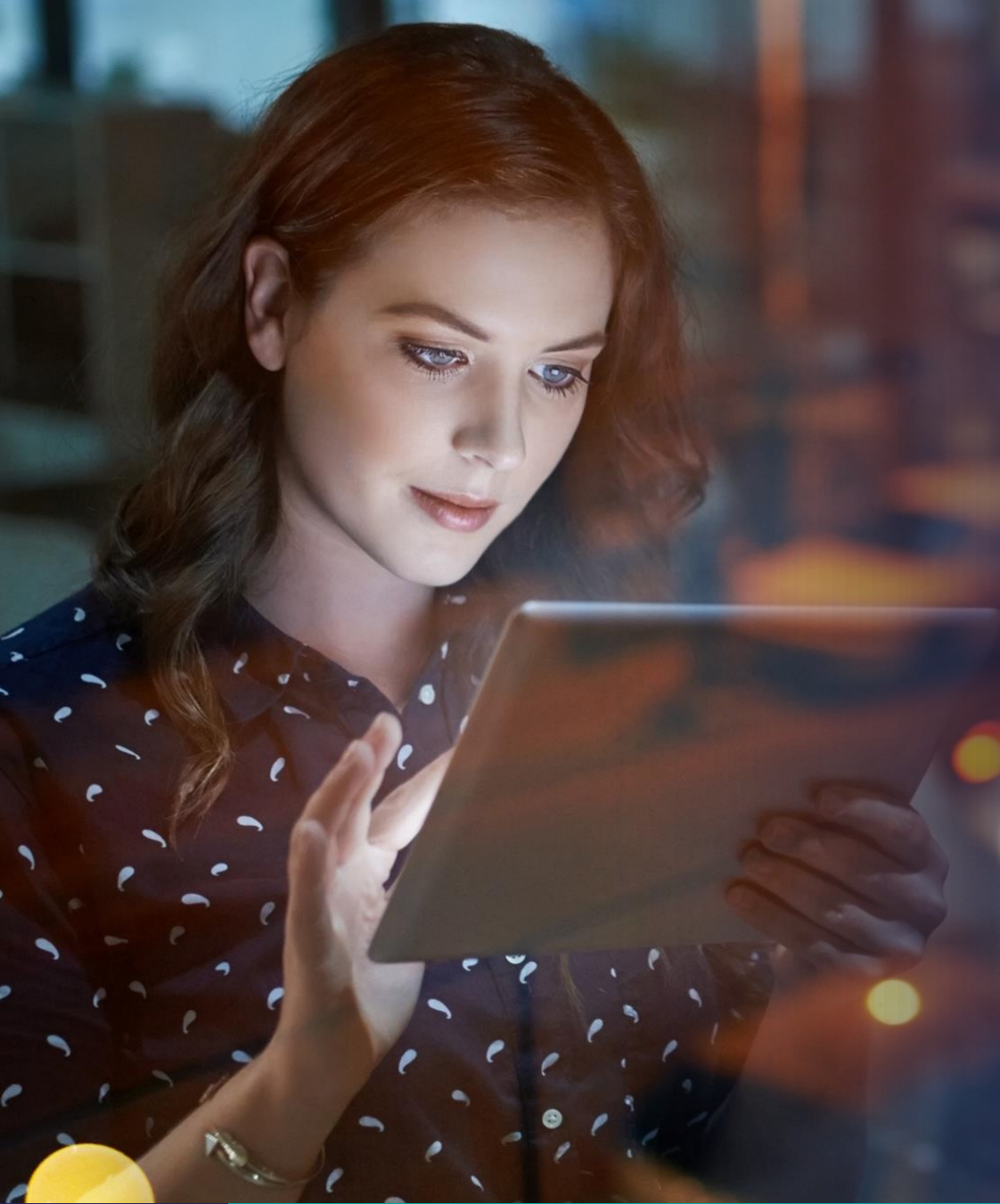
**DIGITAL PROCESS  
AUTOMATION**

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Employees switch apps  
**1100x a day.**

Source: *Demystifying the desktop*, Pega, September 2018



Robotics



Process



Data



Integration



Logic



AI



People

**APP STUDIO** | Job Applicant | Data model | Workflow | Views | Settings | Run

Case life cycle

1. Collect Resume	2. Recruiter Review	3. Interview	4. Decision	5. Offer	6. Accepted
<b>Personal Information</b> 1. New Candidate 2. Personal Information 3. Professional History 4. Duplicate Search Cas... + STEP	<b>Phone Screens</b> 1. Phone Screens 2. Next Best Actions + STEP	<b>Manager Interviews</b> 1. Create Interview Cases 2. Wait for Interviews 3. Proceed? CONFIGURE PROCESS	<b>Internal Approval</b> 1. Approve Candidate 2. Applicant File Search 3. Robot Background C... 4. Determine Comp CONFIGURE PROCESS	<b>Approve Offer</b> 1. Approve Offer 2. Send via DocuSign CONFIGURE PROCESS	<b>Start Onboarding Case</b> 1. Send Email 2. Create Case + STEP

Approval Rejection | + ALTERNATE STAGE

+ PROCESS



Life cycle Optional actions

1. Collect Resume 2. Recruiter Review

Personal Information Phone Screens

- 1. New Candidate
- 2. Personal Information
- 3. Professional History
- 4. Duplicate Search Cases

- 1. Phone Screens
- 2. Personality Tests

+ STEP

Reports

Planning Board

Sarah Peterson

Home Search Create Notifications More

Development QA

JA\_010101\_3 5 Dec 2018 03:11:10

3 branches in queue

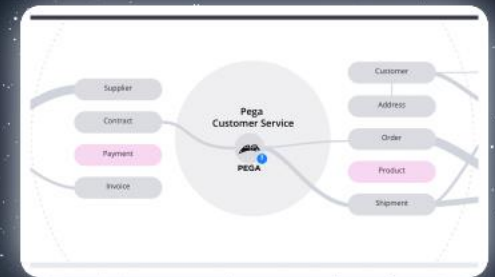
Start deployment

You have 2 items to review

- Review payment (exceeds velocity limit)
- New signatory request

Accounts

Account number	Name	Type	Balance
****0000	Disbursement Account	Zero Balance	\$300,150.19
****0100	Operating Account	DDA	\$1,335,000.62
****0300	Customer Payment Account	Sweep	\$43,921.82



Executable rules 350 Case types 30

Guardrails Weighted score 86

Warnings 42 Severe 12

Test coverage Rules covered 70%

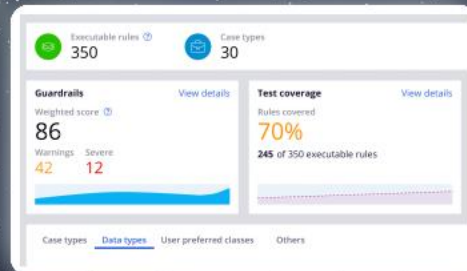
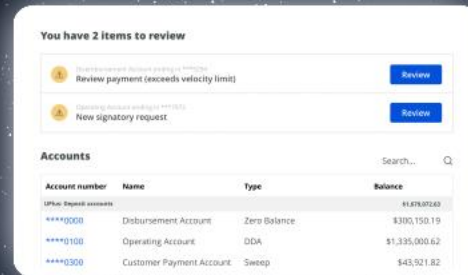
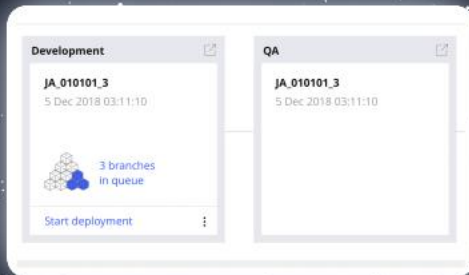
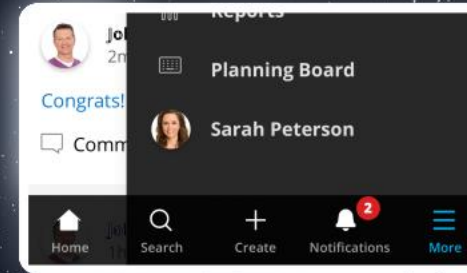
245 of 350 executable rules

Case types Data types User preferred classes Others

Robot Current activity

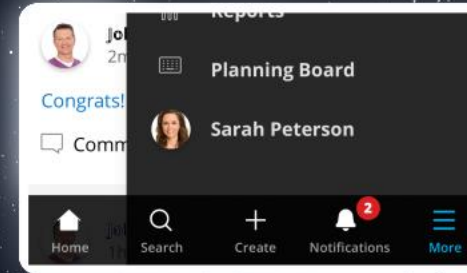
- SuperBot-01 Needs attention Working...
- BK-02 Working...
- BK-03 Working...
- SuperBot-02 Standby

# App Studio with Case Designer





# App Studio with Case Designer



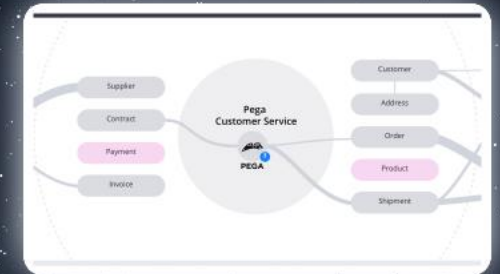
# Deployment Manager

You have 2 items to review

- 1 **Review payment (exceeds velocity limit)** [Review](#)
- 1 **New signatory request** [Review](#)

**Accounts** Search...

Account number	Name	Type	Balance
<small>UPAC - Equity accounts</small>			
****0000	Disbursement Account	Zero Balance	\$300,150.19
****0100	Operating Account	DDA	\$1,335,000.62
****0300	Customer Payment Account	Sweep	\$43,921.82



Executable rules: 350 | Case types: 30

**Guardrails** [View details](#)  
Weighted score: **86**  
Warnings: 42 | Severe: 12

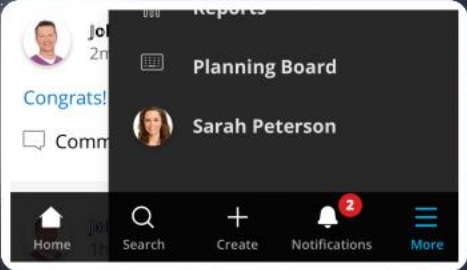
**Test coverage** [View details](#)  
Rules covered: **70%**  
245 of 350 executable rules

Case types | [Data types](#) | User preferred classes | Others

Robot	Current activity
<input type="checkbox"/> SuperBot-01 Needs attention	Working...
<input type="checkbox"/> BK-02	Working...
<input type="checkbox"/> BK-03	Working...
<input type="checkbox"/> SuperBot-02 Standby	



# App Studio with Case Designer •



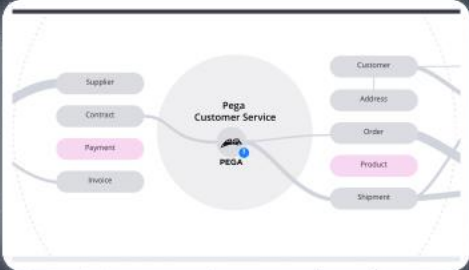
# Deployment Manager •

You have 2 items to review

- Review payment (exceeds velocity limit) [Review](#)
- New signatory request [Review](#)

Accounts Search...

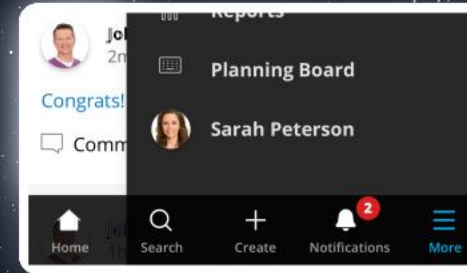
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UPAC - Equity accounts			
****0000	Disbursement Account	Zero Balance	\$300,150.19
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# Quality Dashboard •

Robot	Current activity
<input type="checkbox"/> SuperBot-01 Needs attention	Working...
<input type="checkbox"/> BK-02	Working...
<input type="checkbox"/> BK-03	Working...
<input type="checkbox"/> SuperBot-02 Standby	

App Studio with Case Designer •



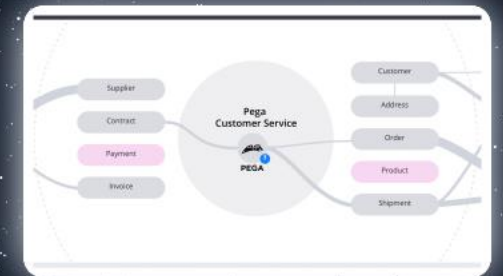
Deployment Manager •

You have 2 items to review

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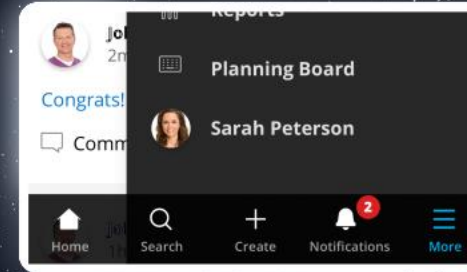


Quality Dashboard •

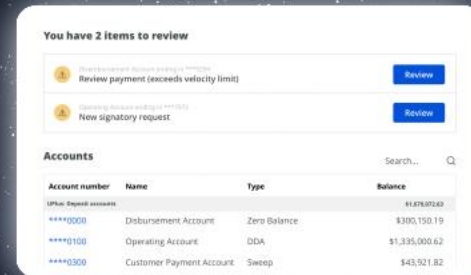
• Robot Manager



App Studio with Case Designer •



Deployment Manager •



• Integration Designer

Quality Dashboard •

• Robot Manager



App Studio with Case Designer •

• Mobility

Deployment Manager •

The screenshot shows a mobile application interface. At the top, it says "You have 2 items to review". Below this are two items, each with a "Review" button:

- 1. Review payment (exceeds velocity limit)
- 2. New signatory request

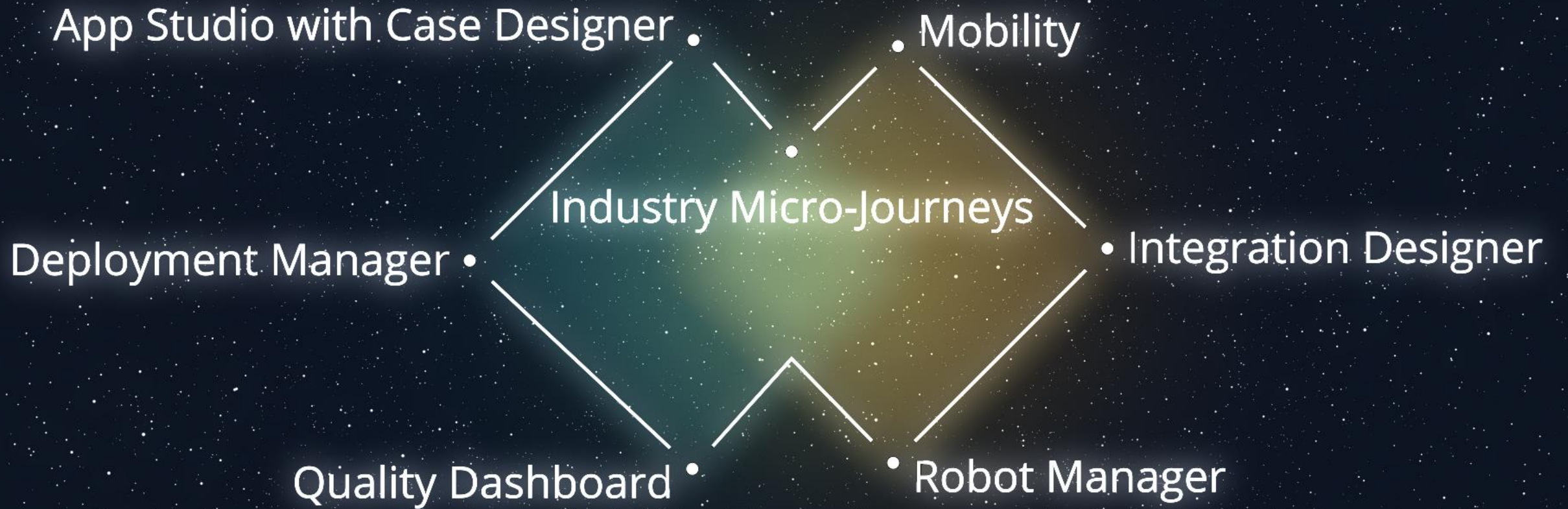
Below the review items is a section titled "Accounts" with a search bar. It contains a table with the following data:

Account number	Name	Type	Balance
<b>UPAC - Regard accounts</b>			
****0000	Disbursement Account	Zero Balance	\$300,150.19
****0100	Operating Account	DDA	\$1,335,000.62
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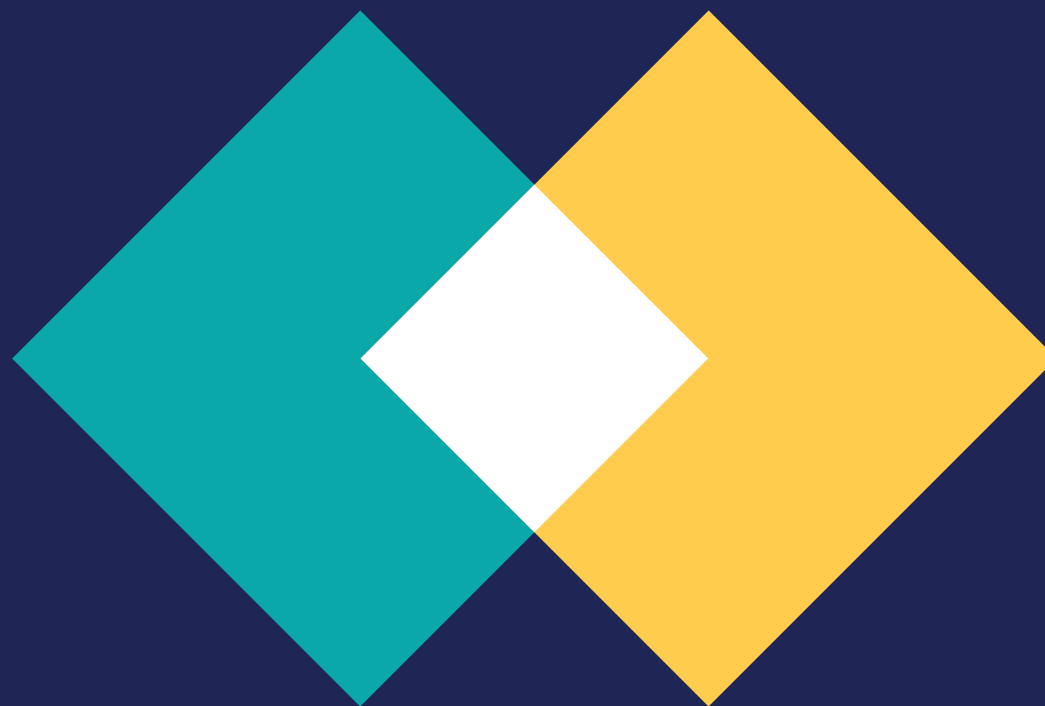
• Integration Designer

Quality Dashboard •

• Robot Manager



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**11:45**

**Naren Gangavarapu**

Director Digital and Information,  
NSW Dept. of Planning, Industry and  
Environment



**Planning,  
Industry &  
Environment**



**12:45**

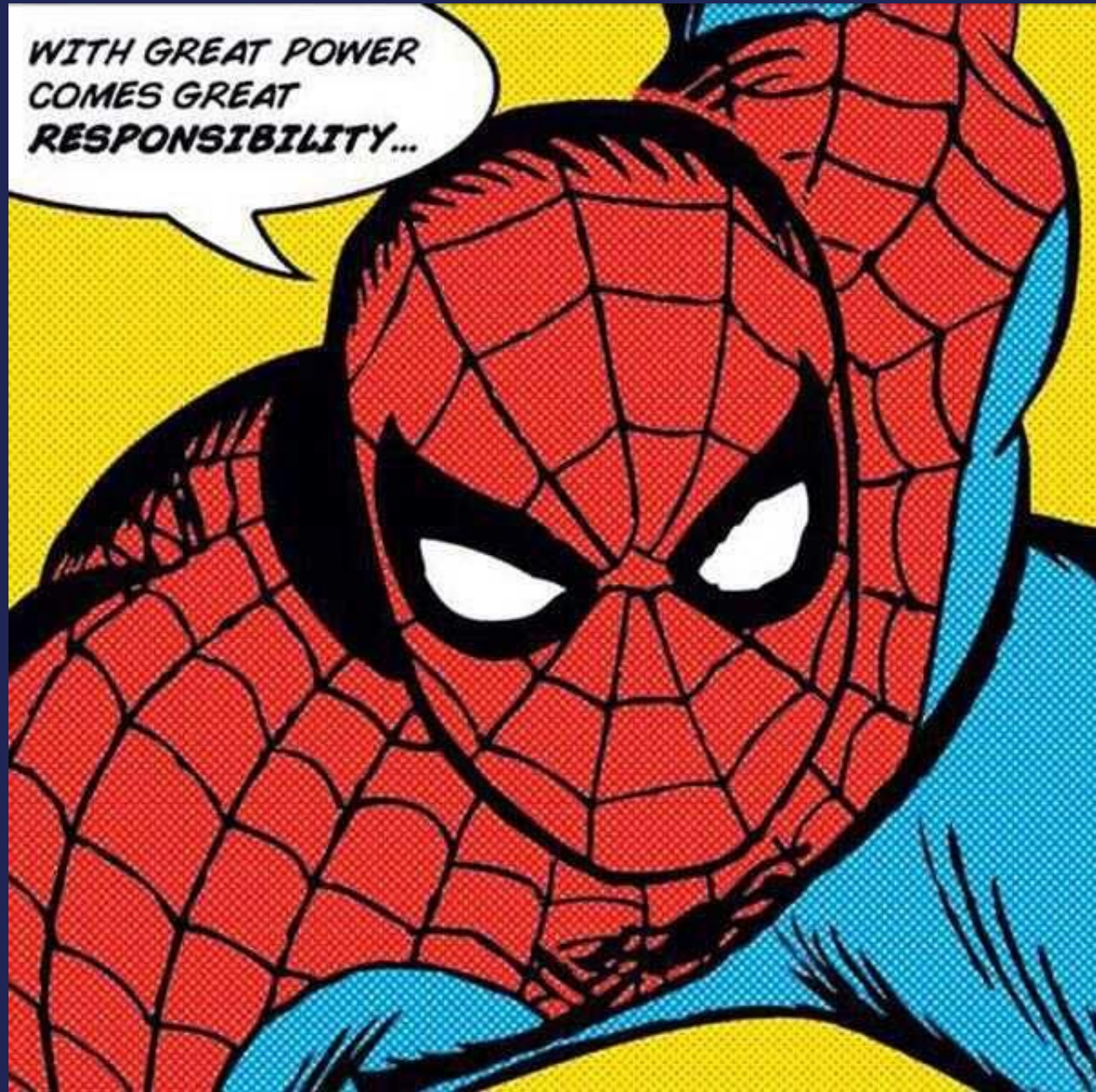
**Matthew Malady**

Head of Data and Decision Science,  
Retail Products & Wealth, CBA



**Commonwealth**Bank

*WITH GREAT POWER  
COMES GREAT  
RESPONSIBILITY...*



# Pega Infinity™

Your platform for transformation and CRM

**CUSTOMER  
ENGAGEMENT**



**DIGITAL PROCESS  
AUTOMATION**



REALTIME,  
OMNI-CHANNEL AI

**Industry-leading technology**



END-TO-END  
AUTOMATION & ROBOTICS



JOURNEY-CENTRIC  
RAPID DELIVERY



SITUATIONAL  
LAYER CAKE

**Start fast and scale**

**MICROJOURNEY ARCHITECTURE™**



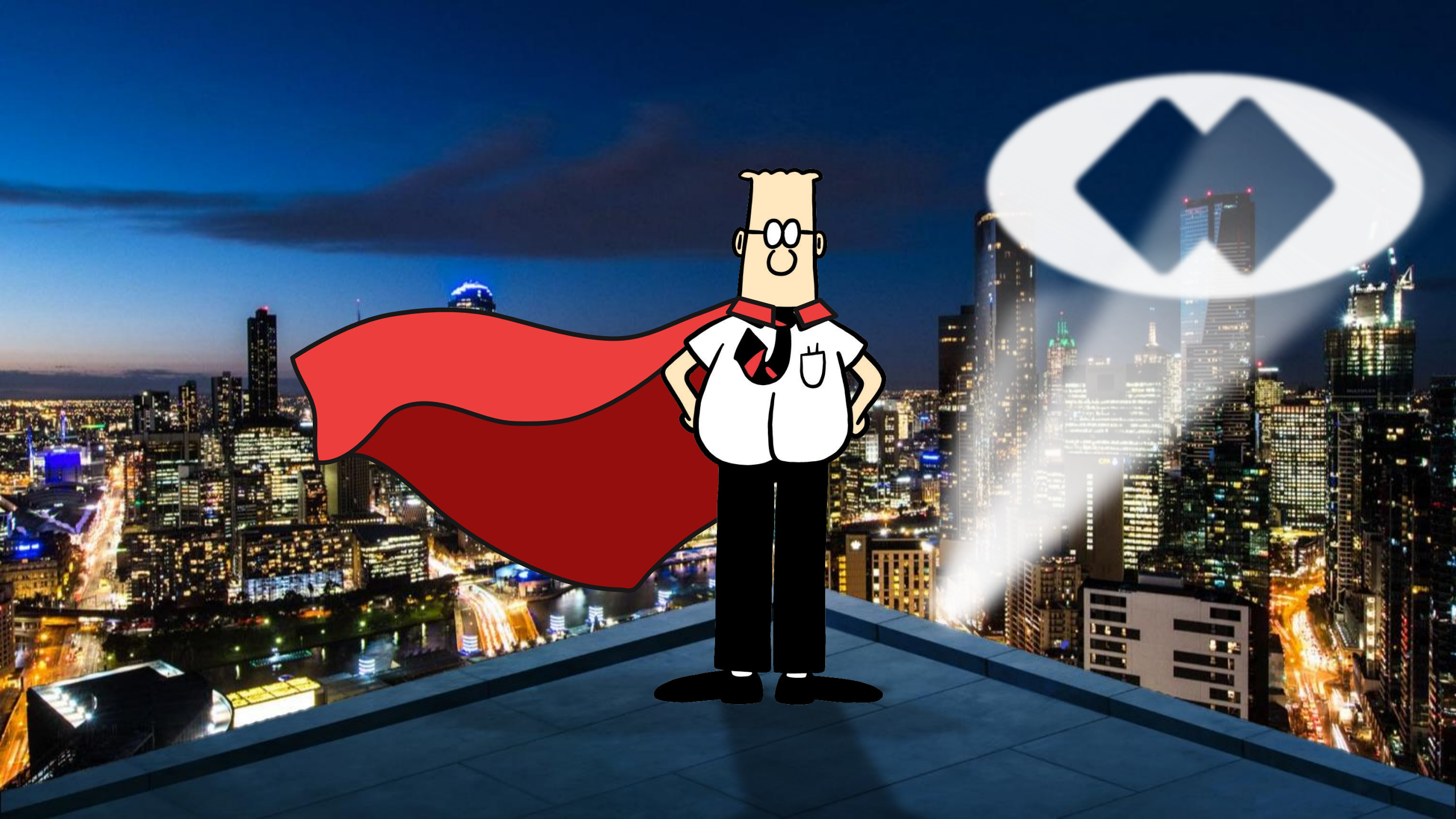
SOFTWARE THAT  
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Build for Change<sup>®</sup>