

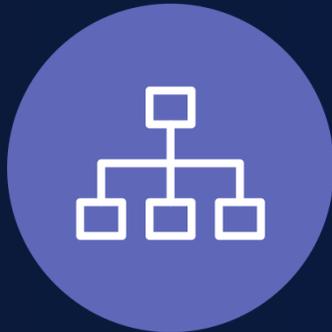
CHAPTER 5:

# Strategic recommendations

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Healthcare leaders consistently ask:  
*'This is all great, but how do I actually use it?'*

The answer lies not in perfect implementation but in strategic evolution – starting quickly, proving value, and scaling based on measurable results.



Leading organizations like Elevance Health, HCA Healthcare, and Highmark are achieving measurable results by treating AI as part of a **comprehensive orchestration strategy**, not an isolated project



**Common success themes** include operational efficiency (reducing administrative burden by orders of magnitude), clinical excellence (allowing professionals to work at top of license), and improved financial performance



These implementations succeeded by using Pega's platform to **connect systems, workflows, and people**, with agentic AI handling the execution, rather than attempting perfect implementation from day one



# Assessing organizational readiness

**Before launching AI initiatives, healthcare leaders should evaluate readiness across four foundational layers. This framework maps directly to Pega's platform architecture.**

## Layer 1: Do you have the data? *(Dynamic Data Definitions)*

- Are critical data sources integrated and accessible?
- Is member information reasonably current and complete?
- Can you track patient journeys across touchpoints?
- Do you understand data quality issues and have mitigation strategies?

If data infrastructure is immature, start there. AI cannot orchestrate workflows without reliable information. However, perfection isn't required, many organizations successfully implement AI while simultaneously improving data quality, as the AI itself can identify and flag data issues.

## Layer 2: Are workflows orchestrated?

- Do standardized processes exist for key workflows (care management, utilization management, claims)?
- Are handoffs between teams/systems defined?
- Can you visualize end-to-end process flows?
- Are there mechanisms to track where work is stuck?

Agentic AI thrives when workflows are well-defined. Even if processes are currently manual, documenting them creates the foundation for automation. Pega's Blueprint architecture accelerates workflow definition and becomes more effective with each use.

## Layer 3: Is decisioning centralized?

- Are business rules documented and consistent across the organization?
- Can you update decision logic without custom development?
- Do you have visibility into why specific decisions were made?
- Are decisions auditable for regulatory compliance?

Centralized decisioning is what allows agentic AI to act autonomously while remaining explainable and governable. If decision logic is embedded throughout custom code, implementing AI becomes much more complex.

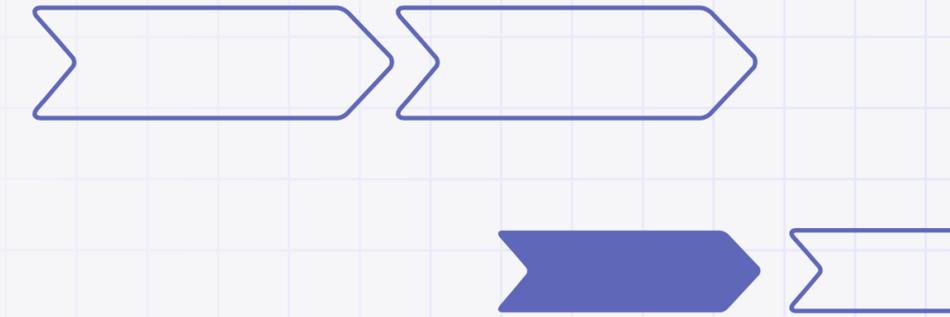
## Layer 4: Is case management scalable?

- Can you handle volume fluctuations without staffing changes?
- Are high-priority cases automatically escalated?
- Do you have real-time visibility into case status and bottlenecks?
- Can cases move fluidly across teams as needed?

Case management is where value-based care happens operationally. AI excels at managing large volumes of cases, intelligently triaging based on acuity and complexity, and ensuring nothing falls through the cracks.



# Strategic implementation framework



# 1

## *Start with high-impact, measurable pilot programs*

Don't aim for enterprise-wide transformation immediately. Instead, identify specific use cases where:

- The workflow is well-understood and relatively standardized
- Success metrics are clear and quantifiable
- Data quality is reasonable (not perfect, but usable)
- The pain point is significant enough that staff will embrace change
- Results will be visible within 3-6 months

### Recommended pilot areas:

- Utilization management: Prior authorization triage and routing
- Care transitions: Post-discharge follow-up and monitoring
- Chronic condition management: Diabetes, hypertension, or heart failure programs
- Quality measure gap closure: Targeted campaigns for specific HEDIS measures
- Member engagement: Appointment reminders and preventive care outreach

# 2

## *Build cross-functional teams*

Successful AI implementations require collaboration across clinical, operational, IT, and financial functions. Assemble teams that include:

- **Clinical leaders:** Ensure interventions are clinically appropriate and align with care standards
- **Operations managers:** Define workflows and validate that automation actually reduces workload
- **Data and analytics:** Ensure data quality and measure impact
- **IT and integration:** Connect systems and maintain infrastructure
- **Finance:** Track ROI and align with contract performance
- **Compliance and legal:** Ensure regulatory adherence and manage risk

Empowering cross-functional teams to make decisions quickly is essential. The goal is evolution, not perfection. Organizations that succeed move rapidly from pilot to production, learning and adjusting along the way.

# 3

## Invest in governance and explainability

Agentic AI makes autonomous decisions, which creates accountability requirements:

- **Audit trails:** Every action must be traceable to specific logic and data inputs
- **Human oversight:** Define thresholds where human review is required
- **Performance monitoring:** Continuously track outcomes to ensure AI behaves as intended
- **Bias detection:** Regularly assess whether AI introduces unfair treatment patterns
- **Regulatory compliance:** Ensure AI operates within legal and ethical boundaries

Pega's platform provides built-in governance capabilities, including decision transparency, audit logging, and explainability features. These aren't add-ons—they're core to the architecture.



# 4

## Focus on adoption, not perfection

Change management is the biggest barrier to AI success. Senior executives focus on logic and ROI, but frontline staff care about whether the technology makes their work easier or just adds complexity.

The adoption equation:

- Staff will adopt AI if it's **10x better** than current processes, OR
- Staff will adopt AI if they don't realize they're using it because it invisibly removes work from their plate

The most successful implementations prioritize the second approach. Rather than introducing new tools that require training, embed AI into existing workflows so users benefit without changing their behavior. This is why Pega's orchestration approach works, it augments existing systems rather than replacing them.



# 5

## Scale based on proven value

After pilot success, replicate across similar use cases. The more you use Pega's Blueprint architecture, the faster subsequent implementations become. Value compounds over time:

- **First use case:** Takes time to define workflows, integrate data, build governance
- **Second use case:** Leverages existing infrastructure, goes faster
- **Third and beyond:** Teams become proficient, implementation accelerates dramatically

This snowball effect is intentional. Pega's platform is designed for reusability-workflows, decision logic, data models, and integrations can be adapted for new use cases rather than rebuilt from scratch.



## Summary of Pega value

### 1. Your business is running on spreadsheets

Value-based care contracts exist, but they're not operationalized. Pega provides the orchestration layer to make them real.

### 2. Healthcare is complex workflows, not a factory

Traditional software struggles with healthcare's organic, interconnected nature. Pega excels here because it's designed for workflow orchestration, not rigid processes.

### 3. AI scales what humans cannot

You can't scale nurses or care coordinators linearly, but you can scale their impact exponentially by using AI to handle routine coordination while they focus on complex cases.

### 4. Speed matters more than perfection

Organizations that start quickly, learn from data, and iterate will outperform those that aim for perfect implementation. Pega enables this evolutionary approach.

### 5. We're changing how the world builds software

Traditional development is too slow for healthcare's pace of change. Pega's approach with AI capabilities allows rapid adaptation.