Pega Client Lifecycle Management (CLM) and Know Your Customer (KYC)

Built for tomorrow. Ready today.

The Challenge

Financial businesses face persistent challenges with manual, time-consuming due diligence processes that create operational bottlenecks and drive-up costs. Legacy systems lack the intelligence for automated data extraction, real-time regulatory guidance, and often prevent customers from efficiently self-managing their compliance requirement.

These issues are compounded by fragmented data across disparate systems, the increased need for robust orchestration of both human and agentic interactions, and the complexity of managing policy rules across a matrix of global jurisdictions and multiple business lines. The result: prolonged onboarding cycles, inconsistent risk assessments, higher operational costs, and increased compliance risks.

The Pega Solution

Pega CLM-KYC is the globally scalable, enterprise-grade solution that transforms client onboarding, Know Your Customer, and ongoing risk assessment through a unified, AI-powered and highly configurable architecture.

Built for speed and uncompromised compliance, it is trusted by leading financial firms worldwide to accelerate time-to-revenue while meeting complex global and local regulatory requirements with confidence.

Pre-architected yet highly flexible, infused with readily available industry best practices and cloud-ready, it combines breakthrough GenAI and agentic automation with dynamic regulatory rules, and robust case management to orchestrate due diligence and compliance workflows seamlessly, across the full client lifecycle.

Pega CLM-KYC automates front-to-back processes, delivering instant regulatory guidance, accelerated document processing and screening, while empowering clients and analysts with intuitive self-service and real-time insights—for exceptional operational agility and reduced manual effort, at scale.

80%
Efficiencies in onboarding processes

>90%
Straight-through processing for KYC reviews

+44%
Increase in Net Promoter Score

20x
Productivity in compliance operations with agentic AI

Cut through the complexity

Connect customers, relationship managers, and sales support to back-office teams and systems. Easily manage complex dependencies and provide visibility and control throughout the client lifecycle.

Accelerate time to revenue

Dramatically reduce onboarding and due diligence cycle times with GenAI-powered automation. Maximize efficiency by eliminating duplicate data requirements and managing processes in parallel.

Remove manual work

Use intelligent automation and GenAI-powered document processing to automate repetitive, low-value tasks. Drive straight-through processing while remaining compliant.

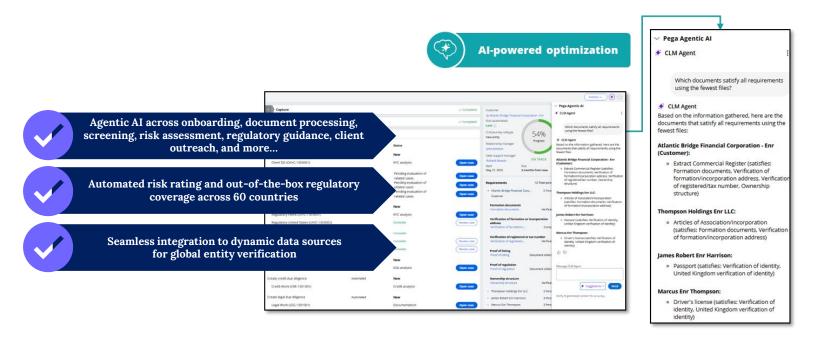## Empower users with instant, actionable guidance

Pega Agents provide real-time, context-aware guidance and curated regulatory definitions, supporting confident decision-making and reducing uncertainty.

Apply a client-centric approach

Self-Service Hub enables customers to complete onboarding independently, across channels, with intuitive workflows.

Respond to change rapidly and ensure compliance

Compel due diligence best practices, regulatory requirements, and internal policies across geographies and lines of business. Instantly update and maintain rules with Pega's low-code approach.

AI-powered optimization

- Agentic AI across onboarding, document processing, screening, risk assessment, regulatory guidance, client outreach, and more...
- Automated risk rating and out-of-the-box regulatory coverage across 60 countries
- Seamless integration to dynamic data sources for global entity verification

Let's get started.
We can't wait to show you what's possible with Pega.

Request a demo