PEGA

Jumpstart digital
transformation with
Pega Blueprint

AI-powered legacy analysis and application development

74% of organizations that embark on legacy modernization projects fail to complete them

Driving automation in the face of legacy debt is a challenge for any organization. Transforming mission critical processes & systems across customer service & operations calls for alignment, change management, and rapid adaptability.

But most enterprise transformations fail before getting off the ground. Why?

- They lack **business & IT collaboration**

- They lack **creative thinking**

- They lack **speed**

AI-powered transformation

There's a better way to transform.

Now enterprises can use AI to accelerate discovery, realize value, and drive the future of work. Organizations that successfully execute this transformation won't just reduce costs and improve efficiency; they'll create sustainable competitive advantages through enhanced agility and innovation capabilities. Transforming legacy infrastructure isn't optional – it's a prerequisite to realizing the autonomous vision. The path forward requires a fundamentally different approach to modernization – one that leads with AI-powered workflow automation.

01.

Rapid Transformation
Reshape your process architecture

- Discover processes and re-engineer applications in record time

- Reimagine applications to incorporate modern best practices and automations

- Free data to the cloud and decouple monolithic architectures

02.

Business Value
Break free from legacy costs

- Break the cycle of annual legacy IT maintenance

- Capitalize on business agility and resiliency

- Deliver best-in-class customer experiences

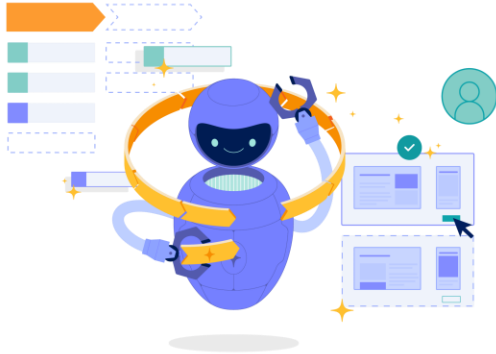## 03.

Unlock Potential
Enable the Autonomous Enterprise

- Implement self-optimizing processes

- Deploy AI-driven decision automation

- Enable predictive maintenance and scaling

Now Self-optimizing

PEGA BLUEPRINT

Transformation rocket fuel

Pega Blueprint is enterprise workflow development powered by AI. Focused on bringing people & AI together to accelerate automation & jumpstart transformation.

How does it work?

#1

Accelerate legacy analysis.

Rather than manually analyzing legacy systems, **extract insights automatically** by uploading:

- **Documentation** (e.g. SOP)
- **Source code** analysis
- **Videos** & screens

#2

Collaborate seamlessly.

Blueprint is 100% collaborative add all **business & IT collaborators** to:

- **Rapidly adapt** AI suggestions
- Capture requirements in **common language**
- **Preview app** throughout

#2

Build on best practices.

Based on requirements, AI Agents behind Blueprint **compose a starting point application** informed by:

- **Industry** best practices
- Pega & partner **expertise**
- Organizational **knowledge**

#4

Jumpstart development.

Eliminate lengthy requirements gathering processes and set devs up for **rapid go-lives**:

- Import Blueprint to **generate app**, in seconds
- Auto-generate **user story backlog**
- Leverage AI across Pega App Studio to **quickly finalize & deploy new app**

"The biggest bottleneck in the digital transformation is to have **business people being capable to talk to IT...**"

Blueprint "provides a structure which translates to speed."

Daniel Wenzel
SVP Design Authorities
Deutsche Telekom
PegaWorld 2024
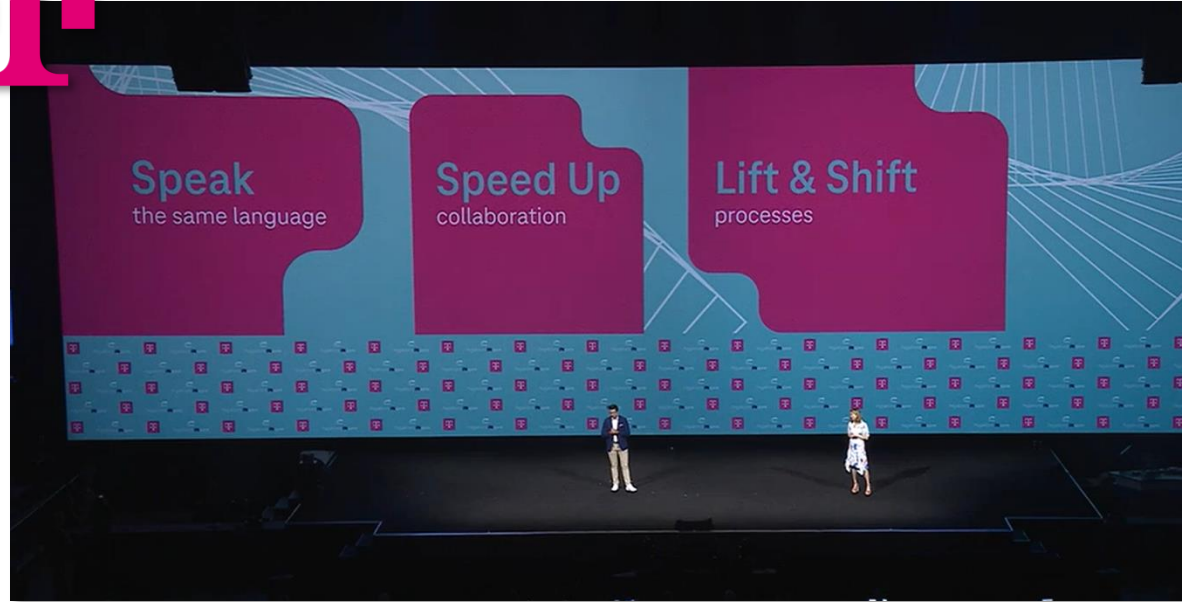
Jumpstart legacy transformation

Rather than manually analyzing legacy systems, **extract insights automatically** by uploading:

- Documentation (e.g. SOP)
- Source code analysis
- Videos & screens

Leverage extracted insights to generate a future-ready application in seconds. Quickly adapt to meet business needs, deploy fast, and retire legacy systems once and for all.

This application needs to streamline our end-to-end card management process from application through account creation & management.
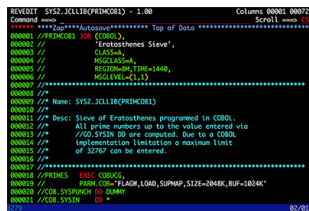
Business goals

Documentation

Legacy app videos, screens, & technical outputs

Supporting content ✕

Kickstart your Blueprint by uploading content related to your application.

Content

📄 **CreditCardAppReq.doc** Requirements ⬇
✦ Functional requirements for the legacy transformation of the CardDemo application.

📑 **businessflow_finalv12.bpmn** Process diagra... ⬇
✦ A BPMN (Business Process Model and Notation) diagram visualizing the flow of activities, decisions, and events in the CardDemo application.

▶ **COBOL_walkthrough.mov** Legacy ... ⬇
✦ A video walkthrough of the CardDemo COBOL application running on a mainframe

📄 **MeetingNotes.docx** Additional assets ⬇
✦ Feature prioritization and objectives for transforming the legacy legacy CardDemo application

✦ **GenAI Summary**

Based on the 4 files provided, here's is a summary of the setup for your Credit Card Management application.

Industry: Banking

Subindustry: Retail Banking

App purpose: Credit Card Management

Functional description:
The application, known as CardDemo, is a comprehensive Credit Card Management System designed for financial institutions or credit card companies. It manages various aspects of credit card operations such as account management, transaction processing, billing, user authentication, reporting, data management, and system maintenance

Location: United States

Workflows

- Create customer accounts
- View customer accounts
- Update customer accounts
- Delete customer accounts
- Calculate interest
- Generate reports
- Generate account statements

Close

Deploy cloud apps in seconds

Import your Blueprint to your private Pega environment – on Pega Cloud or yours – to generate a new application in minutes.

Go–live faster with **AI infused across Pega App Studio:**

- AI-powered developer assistant

- Backlog (user story) generation

- Automatic test generation

- AI-generated UX

- AI-generated integration mapping
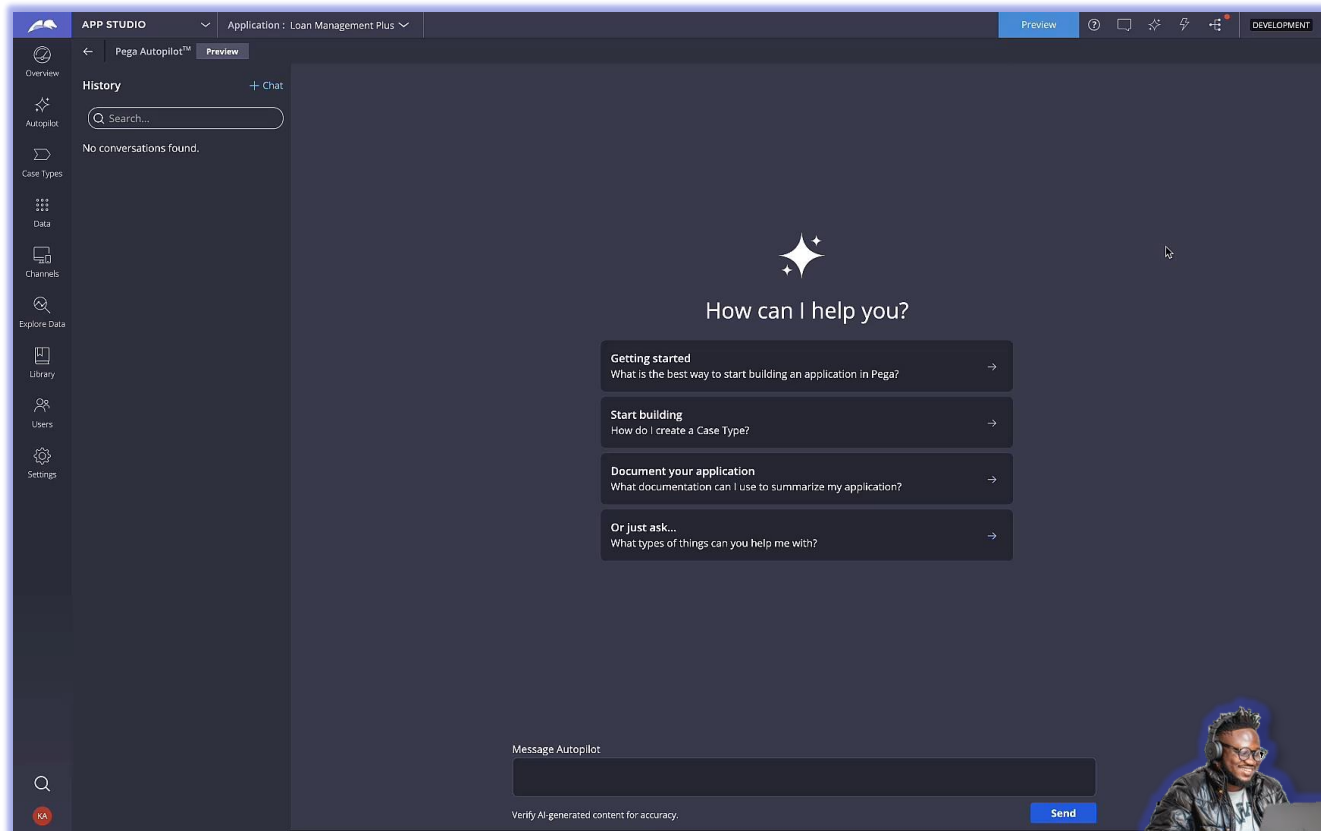
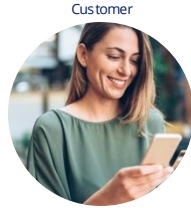**PEGA**

The result?
**Transformed service &
operations, fast.**

Automate service & operations from end-to-end

The world's largest organizations choose Pega to simplify their operations & delight their customers. Blueprint helps you get there faster.

In Pega, workflows are configured with an intuitive business process flow design – which allows both business & IT stakeholders to collaborate on every component of the customer journey.

Every workflow is backed by an enterprise-ready case management framework, which enables leaders to ensure work is audited, optimized, and on track across their operation.

Customer

Orchestrated customer journey
across front- and back-office

Intake	Review	Process	Resolve
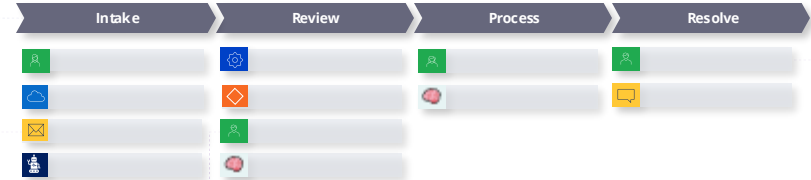
Contact center

Back-office

THE RESULT?

Meet users where they are. With consistency.

With Pega's unique Center-out approach, workflows can be embedded into any channel – arming customers and employees with the outcomes they need across channels. Including:

- **Customer self-service: S**eamlessly embed workflows into existing web, chat, email, & mobile experiences.

- **Agent-assisted service: L**everage Pega's AI-infused Customer Service Desktop, which guides agents through helping customers, fast, with superior customer outcomes.

- **Back-office:** Leverage Pega's operations portal to enable employees to get work done fast, and give executives self-service insights into operational KPIs.

Customer

Intake	Review	Process	Resolve

Back-office

Contact center

Operations
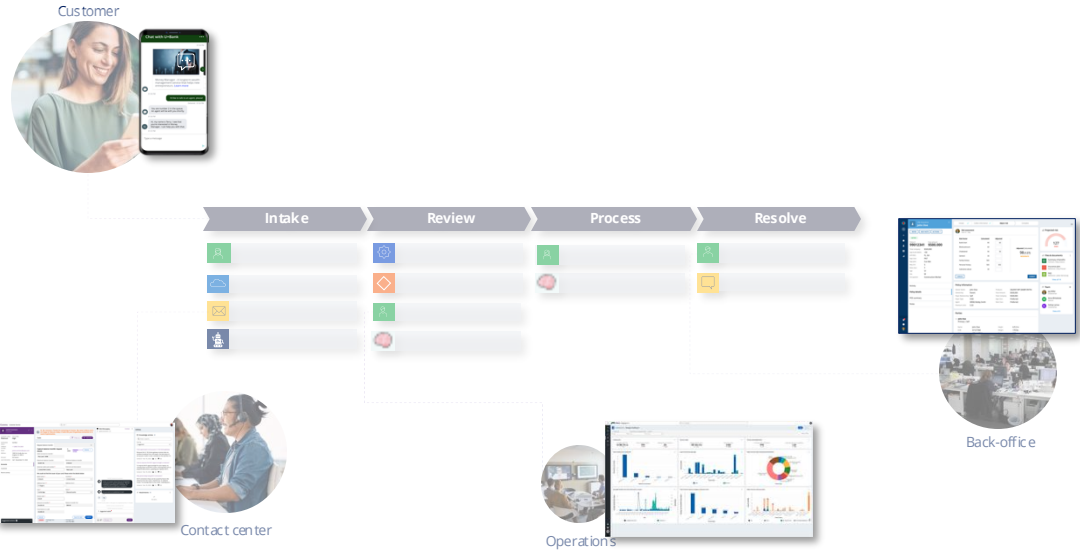
Automate everything

Pega's broad low-code AI & automation capabilities enable enterprises to automate manual work & inject intelligence across the customer journey. And with Pega Live Data, enterprise can intelligently connect to any system in their IT landscape to drive work to done.

Across your app, unleash:

- **Predictable AI Agents:** Agents which are guided by your workflows, so customer and employee requests are always fulfilled in the same approved way, every time.

- **Intelligent calculations and automations:** Dynamic calculation networks that automatically drive predictions and updates when values change.

- **Robotic process automation (RPA):** Attended & unattended RPA allow you to automate desktop processes and access/update information across multiple legacy systems without modern API access.

- **AI-powered decision-making:** Built-in AI capabilities that analyze data patterns, make predictions, and recommend next best actions—ensuring processes adapt in real-time based on historical analysis and changing conditions.

Intake	Review	Process	Resolve
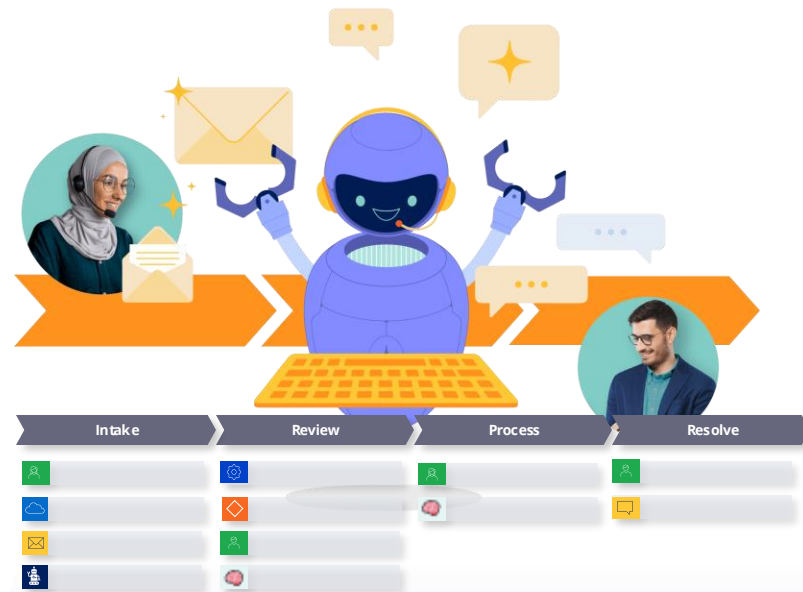
Orchestrate powerful AI & automation

AI Agents	Predictive AI	RPA	Business rules
Integrations	Decisioning	Calculations	Correspondence

THE RESULT?

Drive efficiency & repeatability at scale

Maximize resources and scale your workforce.

- **Prioritize** worklists intelligently based on AI predictions

- Ensure the **right person is working on the right** work with skills-based routing

- Give the entire team a **single view** into all work across operations

- **Track, audit, and report** on every assignment across the operation

⚠ Review information
due in **8 hours**

Keep customer journeys on track
SLA tracking & escalation

Assignment	Due In	Priority
Investigate Fraudulent Activity	6d 3h	30
Process Claims Payment	4d 1h	60
Request for payment extension	3d	80
Prepare Sales Proposal	1mo	

Get Next Work

Complete the most important work, first
Get Next Work

Intake	Review	Process	Resolve

Review information | | Validate amount |

Process dispute
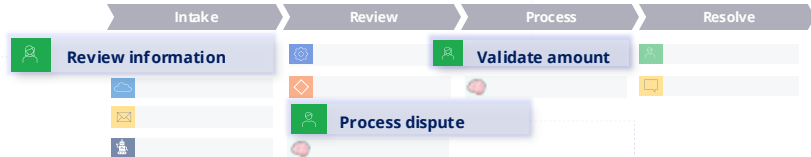
Manage operations at scale
Reporting & auditing
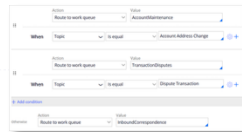
Get work to the right teams
Intelligent routing

"We're all about digital first. Pega is all about digital first... **This is our platform to be able to simplify the whole servicing of a customer world.**"

- Replaced seven disparate systems with one unified agent desktop
- Increased customer cross-sell/upsell by 30%
- Reduced transfer rates by 20%

https://www.pega.com/customers/virgin-media-ireland-customer-service

Accelerate the path to modernization.

Transformation Roadmap

Phase 1:
Discovery & Vision

Transformation Test Drive: 2-week, no-cost pilot to run discovery, reimagine processes, & deploy to the cloud; build a comprehensive go-to-market plan

Phase 2:
Foundation Building

Configure core platform capabilities, establish a governance & change management framework, build knowledge & capacity for internal teams

Phase 3:
90-Day Go-Live

Leverage Pega's AI-powered development to get new workflows live fast. Drive data migration, integration, testing & validation against business requirements

Phase 4:
Business Transformation

Controlled operational rollout to target users, parallel operations to ensure business continuity, monitoring & optimization, start logging early wins

Phase 5:
Legacy Retirement

Ongoing innovation & optimization, continuous evolution, expansion to new business opportunities, decommissioning of legacy applications

Get started
Today

Blueprint is available at no cost to anyone at

www.pega.com/blueprint

PEGA

Pega is the leading Enterprise Transformation Company™ that helps organizations Build for Change® with enterprise AI decisioning and workflow automation. Many of the world's most influential businesses rely on our platform to solve their most pressing challenges, from personalizing engagement to automating service to streamlining operations. Since 1983, we've built our scalable and flexible architecture to help enterprises meet today's customer demands while continuously transforming for tomorrow. For more information on Pega (NASDAQ: PEGA), visit http://www.pega.com

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My Blueprint Dashboard

+ Create

Your Blueprints ⓘ   📄 Pega's Autonomous Vision

⏣ Filter

GOVERNMENT HEALTHCARE AND SOCIAL PROGRAMS • BP-274651
Unemployment Benefits
The purpose of this application is to manage and streamline the processes related to unemployment benefits, specifically focusing on the contributions for health and pension during the period of unemployment. The application aims to automate the calculation and payment of these contributions, ensuring compliance with regulations and timely p insurance providers. Key features include tracking eligibility, managing contribution amounts, and facilitating the reimbursement process for overpaid benefits. By implement
Show more.

GOVERNMENT HEALTHCARE AND SOCIAL PROGRAMS • BP-274582
Contribution Management
The application aims to streamline the management of contributions related to unemployment benefits and private retirement insurance. Its primary objective is to automate processes of contribution payments, refunds, and tracking for individuals receiving unemployment benefits. Key functionalities include direct payment management to insura providers, handling of overpayments, and ensuring compliance with contribution limits. By automating these processes, the application will improve efficiency, reduce admini
Show more.

CORPORATE BANKING • BP-270047
Legal Order Processing
The Legal Order Processing System (LOPS) is designed to efficiently manage the intake and processing of legal orders such as summons, subpoenas, writs, and levies. Its prim objective is to ensure compliance with regulatory requirements while accurately identifying whether the individuals named in the legal orders are bank customers. The applica automates key functionalities including multi-channel intake, customer identification, document classification, and workflow management. By streamlining these processes, L
Show more.

RETAIL BANKING • BP-266181
Retail Loan Origination
Streamline the loan application process, from submission to approval, ensuring efficient communication with applicants. This includes Application Submission and Data Entry Document Verification, Credit Scoring and Risk Assessment, Approval Workflow, Communication with Applicant, and Funding and Disbursement. This could be for any Retail L domains like Mortgage, Secured Retail Lending like vehicle loans or Unsecured loan like retail credit card, consumer credit or open line of credits.

RETAIL BANKING • BP-258398
Billing and Statement Assistance
Assist customers with billing inquiries, statement requests, and dispute resolution.

INDIVIDUAL LIFE • BP-253577
First Notice of Loss
Manage intake, document, and validate information related to new insurance claims from beneficiaries, policyholders or their agents.

CONSUMER TELECOMMUNICATIONS • BP-255005
Customer Service
The Uplus+ Customer Service application aims to enhance customer interactions by providing a structured approach to handling inquiries across various types, including billi