



PegaWorld

JUNE 7-9 | LAS VEGAS

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PegaWorld

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Navigating the Future of Customer Service

A Strategic Roadmap

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Matt Lake

Senior Director,
Customer Service Product

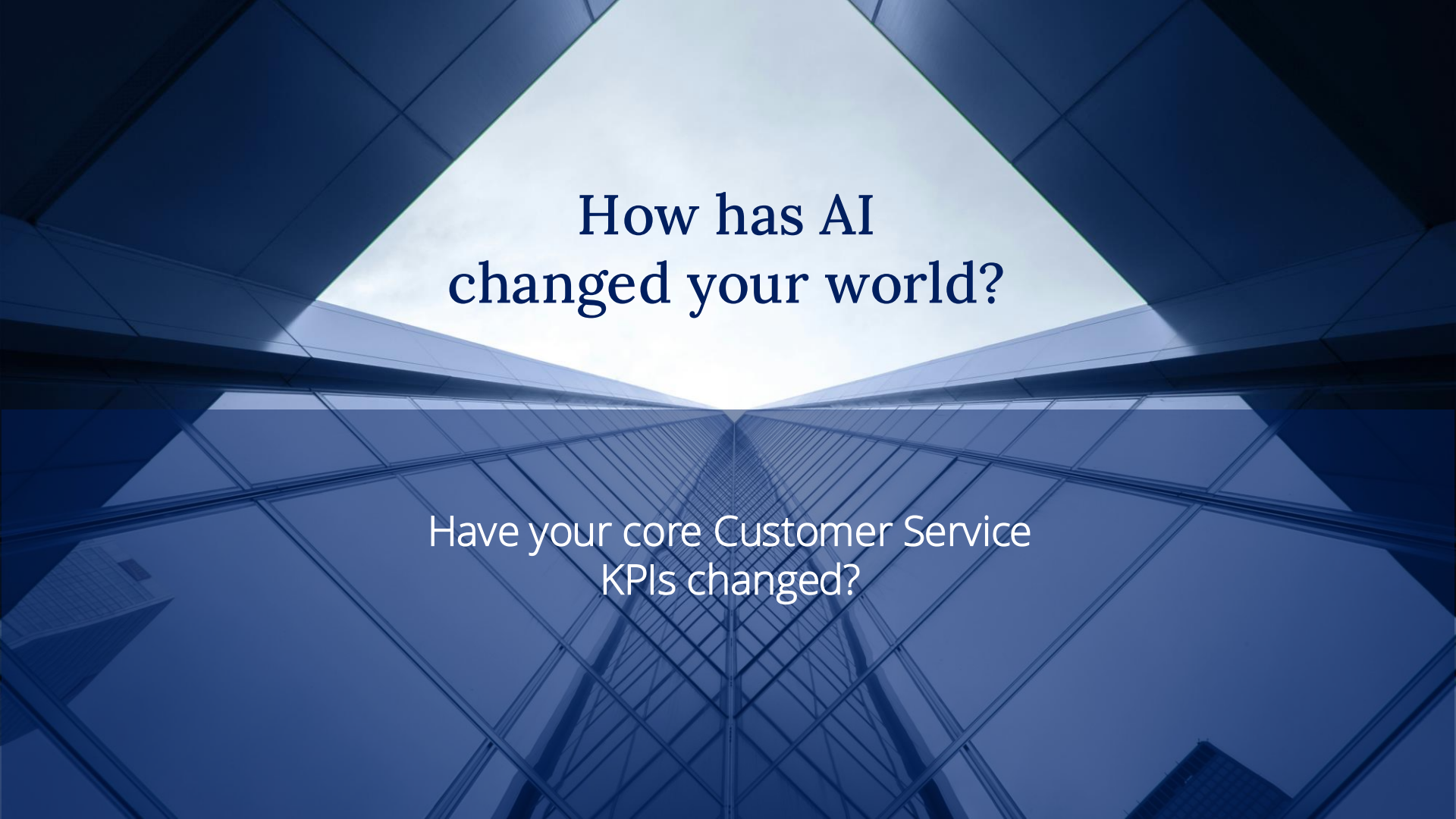
Pega



Jeff Akin

Senior Director,
Customer Service Specialist

Pega



How has AI
changed your world?

Have your core Customer Service
KPIs changed?

Customer Service... reimagined?

Architecting for automation, AI orchestration, and contact center efficiency

77%

**Self-Service
Resolution**

3 min

**AHT
Reduction**

50%

**Faster CSR
Training**

... while improving NPS 10+ points

Pega Customer Service

a (re)introduction



The complete customer service solution

- Best in breed case management & workflow automation
- Unified CSR desktop for all channels
- Web & mobile self service
- Digital messaging & live chat
- Real-time Voice AI & Messaging AI
- Automated interaction summarization & wrap-up
- Auto-discovered & assigned follow-up tasks
- AI-guided interactions & coaching
- Adaptive next-best-actions
- Self-service Agents for Voice, Messaging, and Email
- Pre-built CTI Integrations
- Real-time co-browse
- Knowledge management & Knowledge Buddy
- Robotic process automation (RPA)
- And more...



Service operations are complex

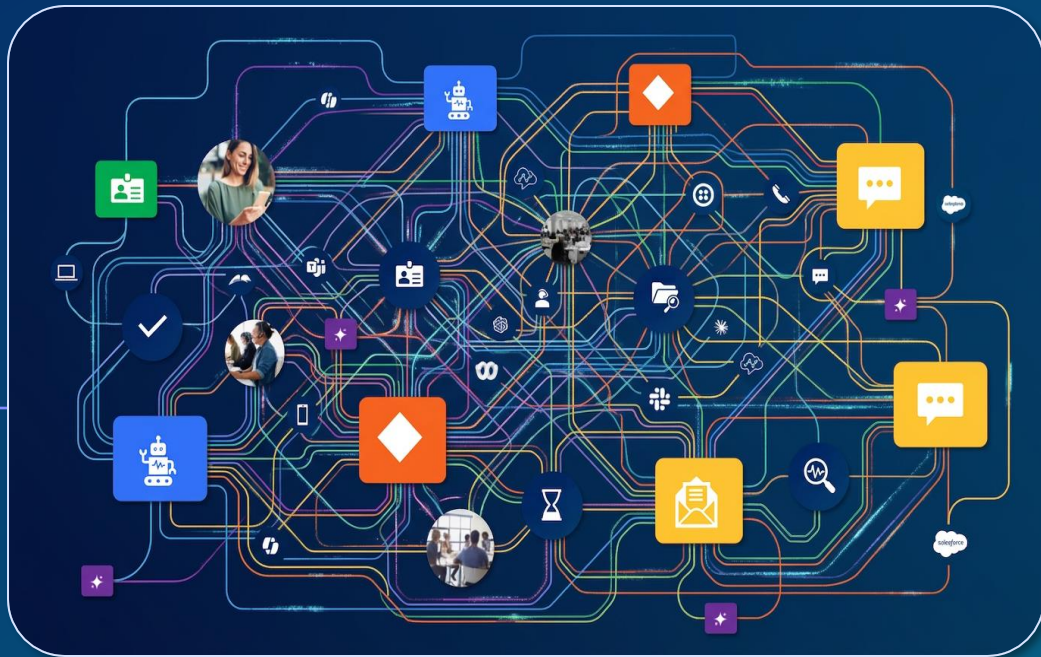
How do you unify service end to end & deploy AI where it matters?



"This is taking too long..."

"I don't know what's happening"

"Why do I have to repeat myself?"



"Our systems are clunky"

"I have to create workarounds"

"Everything takes so long!"

When service is fragmented, no AI can fix it



GENESYS



MCP

Web & mobile

Contact Center

Chat

Voice

Back-office

Collaboration

Orchestrate service work from end-to-end

Deliver outcomes seamlessly across AI, People, Systems



Intelligent case management Agent harness



Status



Customer details



History



Documents



Data

Business Orchestration and Automation Tech (Gartner)



“Key innovations include **Predictable AI Agents for automation** and **Agentic Process Fabric for unified orchestration**”



Digital Process Automation (Forrester)



“Pega best suits enterprises with **sophisticated transformation goals**, particularly if they want to **focus on customer-facing AI agents.**”

Task-Centric Automation (Forrester)



“Pega excels in providing a **top-tier design** environment, agentic **automation**, agentic **orchestration**, and **governance**”

Customer Service Solutions, Q1 2026



Pegasystems offers all the building blocks for *autonomous service*.

Its superior case management orchestrates workflows across channels and across the enterprise.

Real-time AI coaching, knowledge, and next best actions adapt dynamically

2026 Forrester Wave™ **Customer Service Solutions**

A recent history of AI

new since PegaWorld 2025



\$40 billion+ in enterprise AI spend¹ and
56% of CEOs say they've **gotten nothing back**²

















The market is realizing AI needs *structure*.

**Gartner Expects Most Enterprises to Abandon Assistive AI for
Outcome-Focused Workflow by 2028**

Over 40% of agentic AI projects will be canceled by the end of 2027,
due to **escalating costs, unclear business value or inadequate risk controls**, according to Gartner, Inc.

The market is realizing AI needs *structure*.

Consideration	Process	Status	Prioritization	SLA	Deterministic logic	Reporting	Auditing
Pure Agentic Systems	 Catching up	 Catching up	 Catching up	 Catching up	 Catching up	 Catching up	 Catching up
Orchestration engines							

At the end of the day, everyone else is *rebuilding orchestration*.

A roadmap to Value

*Where to get started?
AI for everyone!*



Redesign Customer Service for the Agentic AI Era

With Pega Customer Service



Reimagine your service workflows

Design & modernize service journeys, launching in days - not months

Automate with AI you can trust

Deploy AI within your workflows, driving efficiency and automation

Deliver on the self-service promise

Workflow powered AI Agents resolve complex issues confidently and reliably

Empower teams for complex work

Provide CSRs real-time AI guidance, context, and action while automating routine work



Reimagine your service workflows... *fast*

Design & modernize service journeys, launching in days - not months

AI Leaders aren't bolting on, they're *reimagining* mission-critical processes for the AI era

Per [McKinsey](#), 50%+ of **AI high performers** are using AI to transform their businesses, redesign workflows, and build new applications.



Reimagine service As orchestrated end-to-end journeys

Modernize service for the agentic era

- Build on **best practices for your industry**
- Instantly **transform customer service journeys**
- Fully **transparent to business & IT**

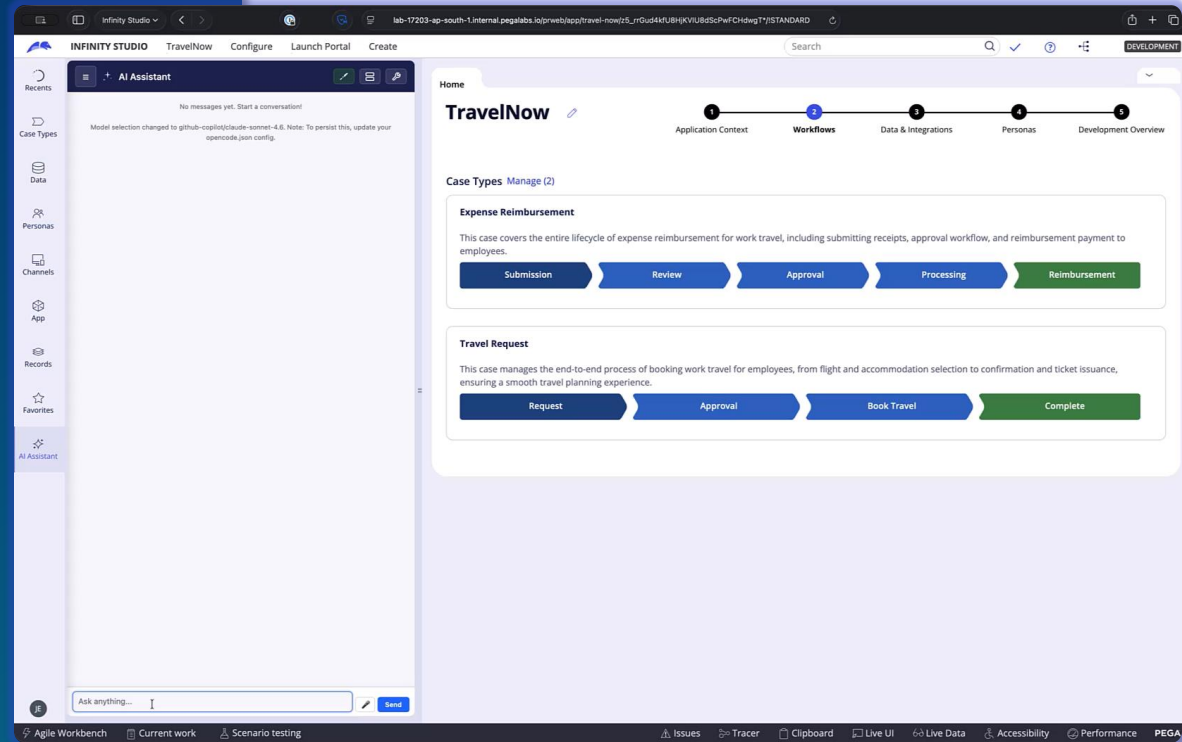


BLUEPRINT AI MCP

10x developer productivity

Build with the speed of AI

- **Infinity AI assistant** uses best-in-market models for 10x productivity
- **Streamline SDLC** from idea to delivery
- Build new workflows & applications with **the power Blueprint AI**
- Maintains **enterprise security** and business certainty



My dashboard

Get next work

My work My work queues My teams Followed work

My unified worklist 0 results

Urgency	Task	Requested by	Case type	Service account name	Case ID
---------	------	--------------	-----------	----------------------	---------

No records

Knowledge

Select helpsite

Enter a search

Category

Filter by category

Sort by

Most recent

Clear

No items

My team efficiency last week

Channel

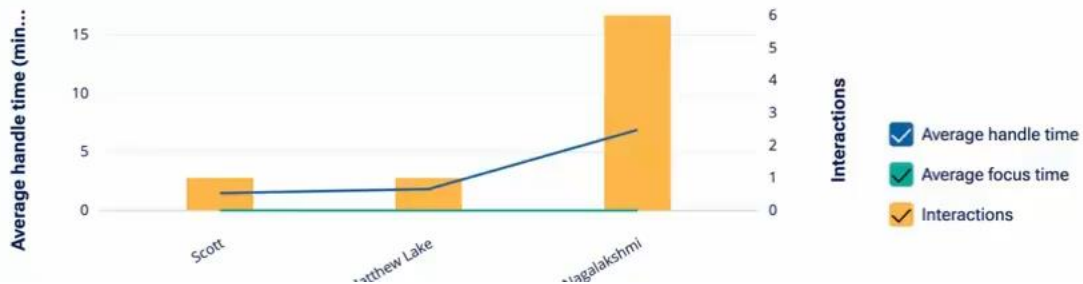
Any

Team

Any

Reset

Apply



Pulse

ML Post

ML Matthew Lake

19 days ago • Post

I need to switch shifts this weekend, can someone help me with the Saturday evening shift?

1 comment



S

Scott

Faster & smarter path to production

Built-in deployment governance

- **Auto-generate pipelines** from Blueprint
- Agentic **DevOps Assistant**
- AI driven **risk assessment**
- Intelligent **failure diagnostics**
- Cloud native **UI tests**

The screenshot displays the PEGA Deployment Manager interface. At the top, it shows 'DEPLOYMENT MANAGER' with account and project information, and the time zone 'America/New_York'. A navigation sidebar on the left includes Home, Pipelines, Reports, Users, and Resources. The main content area is titled 'Application Pipelines' and features a search bar, filters for 'Active' and 'Archived', and a 'New' button. Below this, a list of pipelines is shown, including 'AccountMgmtTestVersion 01.01.01' (Deployment pipeline AMT_67_Dec_2024) and 'BABeispVersion 01.02.02' (Deployment pipeline BA-Beispiel Release). Each pipeline entry shows its current deployment status (e.g., '#11 WAITING'), deployment date, and a progress bar with stages like 'Development' and 'Quality Assurance'. A 'Pause' button is visible for each pipeline.

On the right side, the 'Deployment Intelligence' section provides key insights:

- Deployment health: Needs attention**: Pipeline AMT_67_Dec_2024 has 3 active issues requiring review.
- Critical**: Security scan detected 2 vulnerabilities. High-severity CVEs found in artifact dependencies. Recommend updating packages before production.
- Warning**: Test coverage below threshold. Current coverage: 67%. Target: 80%. 156 lines uncovered in quality assurance stage.
- Info**: Deployment time increased 23%. Average deployment duration: 14m 32s (up from 11m 50s). Check artifact generation step.

Below these insights, 'DORA metrics (last 30 days)' are displayed:

- Deployment freq. per week: 4.2 (↑ 12%)
- Lead time days: 2.1 (↓ 8%)
- MTR minutes: 45 (↑ 5%)
- Change fail % percent: 8.3 (↓ 2%)

The 'Deployment evidence' table at the bottom right shows the following data:

Stage	Task	Status	AI insight
Dev	Build	✓	Optimal
Dev	Scan	⊗	Issues found
QA	Test	⚠	Low coverage



Automate with AI you can *trust*

Deploy AI within your workflows, driving efficiency and automation

Agent Steps

Automate tasks you thought only humans could do.

Leverage purposeful AI within a directed workflow, for example:

- **Generate a summary** at a transition point
- **Verify customer documents** to confirm eligibility
- Dynamically **determine best course of action** to achieve target SLA

The screenshot displays a workflow with five stages: Intake, Research, Triage, Orchestrate, and Resolve. The 'Summarize Case' step is highlighted in the Triage stage. A configuration window for this step is open, showing the following settings:

- Agent***: Case summary
- Input message***: "Summarize Case"+.CaseID
- Output message***: .CaseSummary
- Audit note**: (Empty text area)

The configuration window also shows a 'Summarize Case' step card with a trash icon and a '+ STEP' button.

Agentic Assignments

Keep your work moving, always

Reduce manual follow-ups with proactive AI to human engagement

- AI agents can **proactively reach out** and gather required information
- **Auto-validate responses** and advance the work forward immediately
- **Full visibility and audit trail** of every automated interaction build confidence

The screenshot displays the Pega Blueprint AI Assistant interface. On the left, a task card for 'Site Acquisition SA-2349' is visible, showing details like Priority 95, Acquisition Owner, Location Address, Site Name, Site Type, and Survey Date (2/28/25, 11:00 AM). A central message window titled 'Additional Information Needed - Site Acquisition SA-2349' shows a conversation between 'BlueprintAgent' and 'Healy, Matt'. The agent's message asks for site details, and the user's response lists 'Site Name', 'Survey Date', and 'Location Address'. A status indicator shows 'Waiting for Matt's response'. On the right, a sidebar lists various system components like Desktop Employee, Mobile Employee, Salesforce Extender Employee, Contact Center CSR, Web Self Service Customer, Conversational Self-Service Customer, and DxAPI System.

Drive Documents to Action

Automate document processing directly within your workflows

- **Instantly analyze documents** to extract and validate critical information
- **Confidence scoring** drives straight-through processing
- Empower teams with conversational **insight directly within their workflow**

The screenshot displays a Pega Document Agent interface for a user named Peggy Smith Rogers. The interface is divided into three stages: 'Create', 'Doing', and 'Done'. The current stage is 'Doing', where a task titled 'Review AI suggested: Submit Documents' is being processed. The task is assigned to Peggy Rogers and has a priority of 10 and an urgency of SUCCESS.

The form contains the following fields:

- First name***: Rachel
- Last name***: Davis
- Address**: 123 North Main Street Apt. 1 Quincy, MA 02169-1234
- Date of birth***: 01/12/1989

Each field has a 'Clear suggested' link below it. A 'Review: Clear suggested' link is also present under the address field.

On the right side, there is a 'Proof of identity' section showing a preview of a Massachusetts Driver's License. The license details include:

- State: MASSACHUSETTS
- License Type: DRIVER'S LICENSE (NOT FOR FEDERAL ID)
- License Number: S99988801
- DOB: 01/12/1989
- Expiration Date: 08/16/2026
- Issuance Date: 08/16/2021
- Holder Name: DAVIS RACHEL
- Address: 123 NORTH MAIN STREET APT. 1 QUINCY, MA 02169-1234
- Signature: Rachel Davis
- Sex: F, Height: 5-04", Eyes: B, Hair: B

At the bottom of the interface, there are 'Cancel', 'Save for later', and 'Submit' buttons.



Deliver on the *self-service promise*

Workflow powered AI Agents resolve complex issues confidently and reliably

AI Changes the Interface



With Orchestration, AI gets work done



Two Ways to Deliver Self Service Agents (powered by Pega workflow)

PEGA
AGENTS



3RD PARTY
AGENTS



Pega *owns* the journey
end to end

- Replace legacy chatbots and IVRs
- Integrate with existing telephony
- Deploy agents for voice, chat, and email

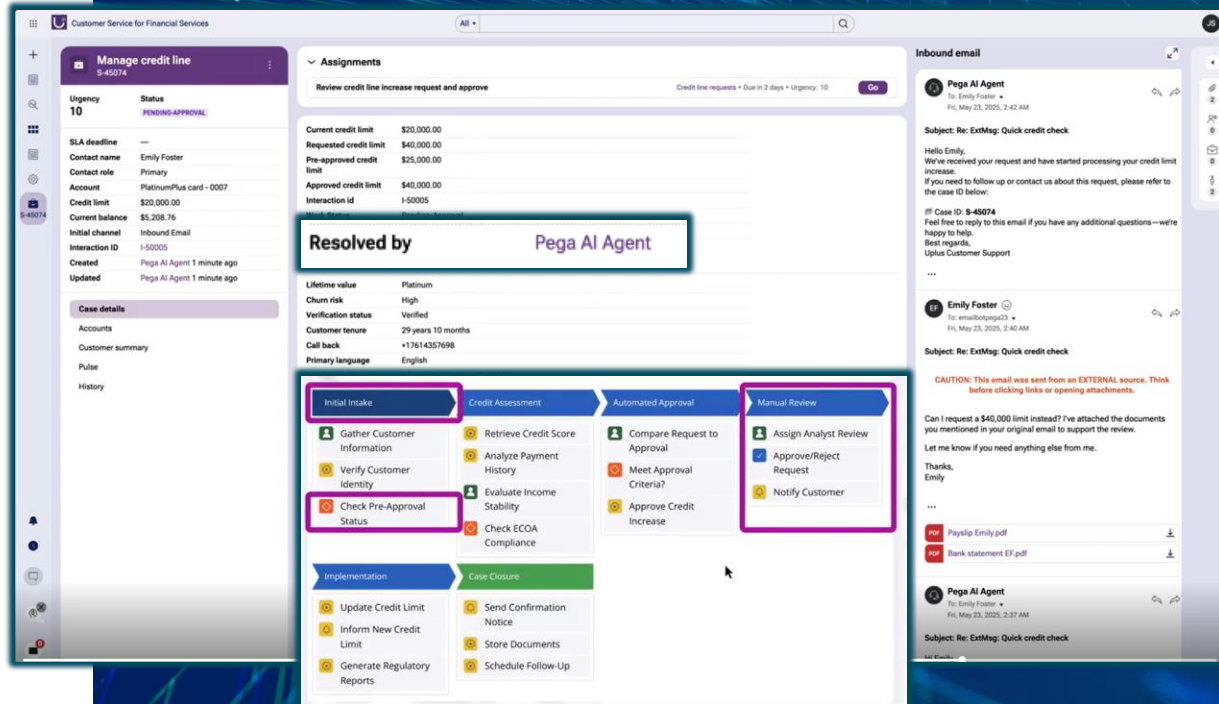
Pega *executes* the work behind
your *existing agent*

- Complement 3rd party agents
- Move from conversation to execution
- Retain existing investments

Transform email automation with Agentic AI

Next-Generation Email Interactions

- Contextual, **personalized, automated email Agents** execute complex work
- Enhance efficiency with **AI-powered classification** and **auto form filling**
- Always supports **human-in-the-loop collaboration** as necessary
- **Handles complex scenarios** with multiple questions and long threads





Empower teams for *complex work*

Provide CSRs real-time AI guidance, context, and action while automating routine work

Create expert service teams

Optimize performance with real-time AI



Scale expertise

Direct employees with AI-powered coaching based on your specific best practices & policies.



Focus on work that matters

Save time by automating manual work, auto-completing tasks, and drafting messages.



Gain instant knowledge

Connects employees with instant answers from the collective knowledge of your enterprise.



Make data work for you

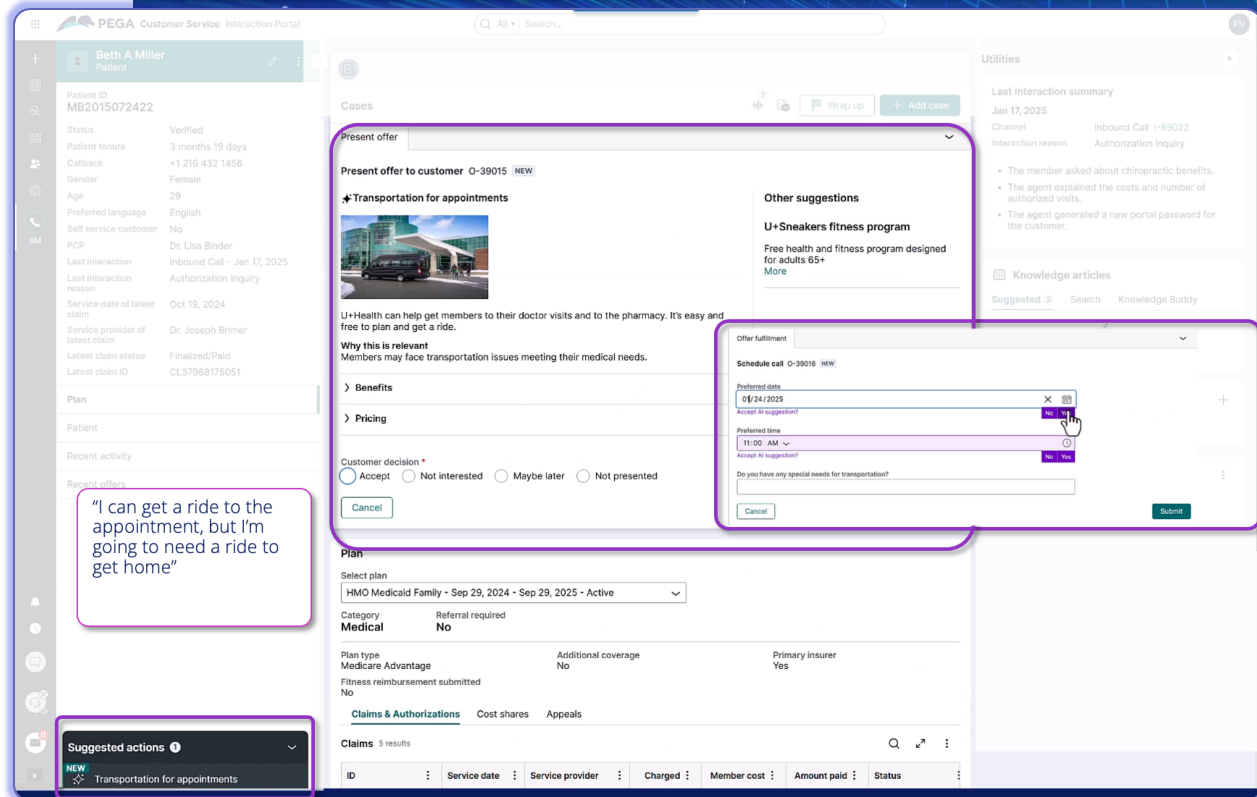
Gain insight fast with cohesive summaries and reports that inform high-impact action.



Voice AI & Messaging AI

AI listens to every call or chat to drive automation, insight, action

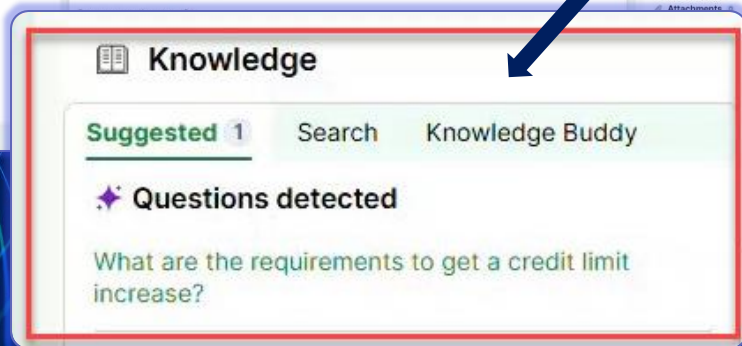
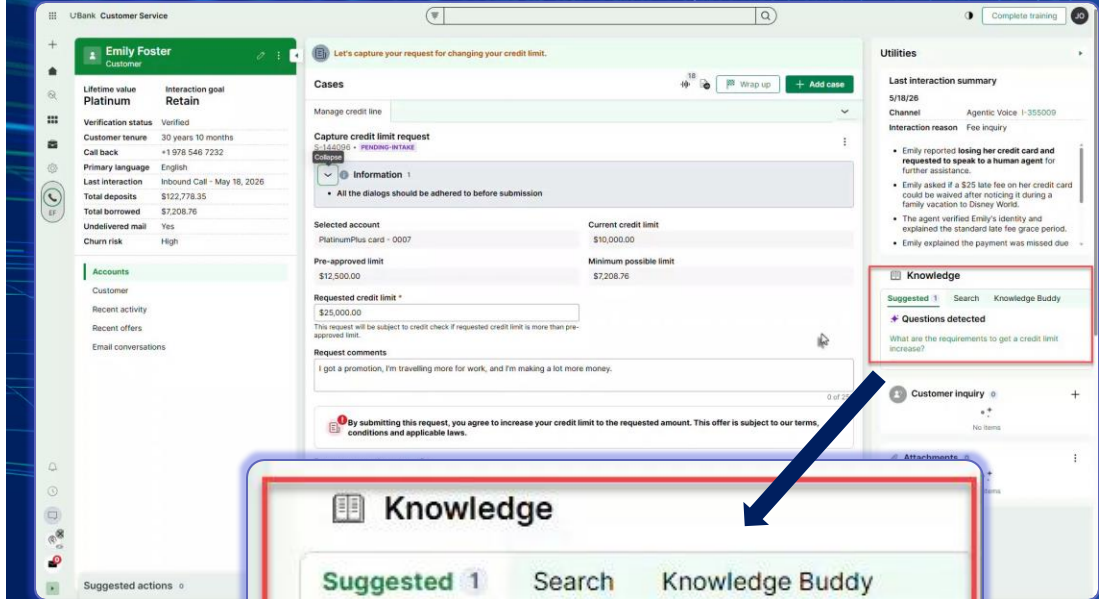
- **Automate post-call summaries**, dispositions, and follow-up tasks
- **Real-time script adherence** for consistent, auditable experiences
- **Automate data and form fill** to reduce errors and accelerate work
- **Deliver true next best actions** (via Pega Customer Decision Hub)
- **Auto-suggest relevant answers** with context-driven Knowledge Agents



Knowledge Buddy

Intelligent knowledge, automatically delivered in real-time

- Provides trusted answers **grounded in your enterprise knowledge**
- **Unlock existing knowledge** and documents via intelligent ingestion
- Available with full context within **any workflow, application, agent, channel**
- **Enterprise-grade governance**, security, and control with full auditability
- Continuously improve with a **built-in feedback loop** and AI-powered authoring



Accelerate CSR onboarding

Reduce time to competency with “live” AI-simulated customer training

- **Quickly onramp new CSRs** by practicing on realistic AI customers in any channel
- **Build specific scenarios** and customer profiles, ensuring relevant learning
- **Deliver real-time coaching & feedback** to identify skill gaps and improve performance
- **Improve service quality and consistency** with highly trained service representatives

The screenshot shows the PegaWorld interface with a leaderboard. The table has columns for Rank, Organization, Name, and Score. The top performer is Perf_Test PW_User_08 with a score of 2,200,000. Other users include Perf_Test PW_User_01, Perf_Test PW_User_03, Sathish New, Perf_Test PW_User_02, Perf_Test PW_User_04, Perf_Test PW_User_05, Akhila Donthineni, Peddi Y, Gambera O, Sathish IT, Priyanka BO, Arun BO2a 2a, Pushpa M, Priyanka User3, and Agentic 1a.

Rank	Organization	Name	Score
1		Perf_Test PW_User_08	2,200,000
2		Perf_Test PW_User_01	880,000
3		Perf_Test PW_User_03	880,000
4	tcs	Sathish New	498,625
5		Perf_Test PW_User_02	
6		Perf_Test PW_User_04	
7		Perf_Test PW_User_05	
8	TransUnion	Akhila Donthineni	
9	Google	Peddi Y	
10	WORLD OF ANANDA	Gambera O	
11	cognizant	Sathish IT	
12	aaseya	Priyanka BO	
13	Arch	Arun BO2a 2a	
14	MetLife	Pushpa M	
15	PEGA	Priyanka User3	
16		Agentic 1a	

About this interaction

Summary Feedback

Professionalism Score	9	<i>i</i>
Conversation SAT Score	8	<i>i</i>
Interaction Effort Score	9	<i>i</i>
Resolution Prediction Score	9	<i>i</i>
Detection of CSR Profanity	No	<i>i</i>
Agent Sentiment Score	8	<i>i</i>
Customer Sentiment Score	7	<i>i</i>
Professionalism Coaching	Continue to enhance engagement by proactively addressing any potential complaints during the conversation.	
		<i>i</i>

What's Next?

- **Visit the innovation hub!**
(it's still open)
- **Understand your CS processes**
(and improve them)
- **Focus on outcomes first**
(and leverage AI & other tools to that purpose)
- **Keep Pega current**
(to easily access all this innovation)



Questions



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