InterSystems®
Creative data technology

CRM Redefined: Innovation, Insight, and Value

PegaWorld

JUNE 1-3, 2025 | LAS VEGAS

Speakers

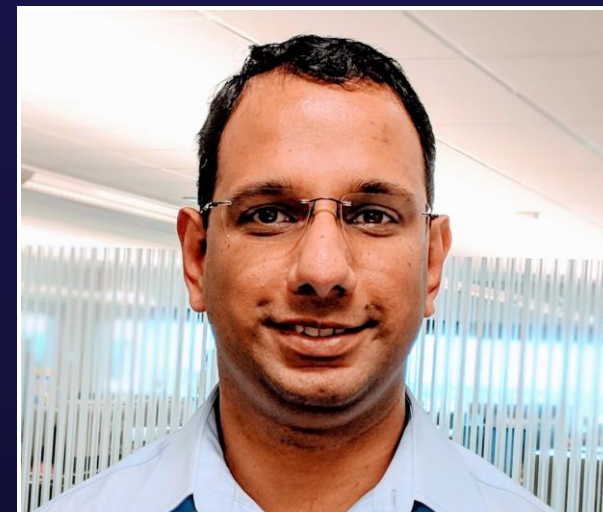**Corey Ledin**
Director of CRM
InterSystems

Blends technical innovation with engaged
leadership to empower excellence

Kanishk Mittal
Principal Technical Specialist
InterSystems

Turns complex business needs into
scalable, data-driven solutions

Ram Nagarajan
Director of Engineering
Pega

Loves building great software that
accelerates value for clients

Agenda

InterSystems' Story

We are the engine behind the world's most important applications

Company Culture
Innovation, collaboration, and customer-centricity.
Emphasizes teamwork, diversity, and professional growth.
Active participation in local and global initiatives.

History
Founded in 1978 in Cambridge, Massachusetts.
Launched Caché, a high-performance post-relational database.
Expanded into healthcare with HealthShare, enhancing data interoperability.

Products
InterSystems IRIS
InterSystems IntelliCare
InterSystems IRIS for Health
HealthShare
TrakCare

InterSystems' Story

We are recognized for excellence.

We put our heart into our work and are honored to receive accolades from analysts and customers alike.

FORRESTER

Forrester has recognized the InterSystems IRIS Data Platform™ as a Leader in The Forrester Wave™: Multimodel Data Platforms, Q3 2021.

Gartner.

2024 Gartner® Magic Quadrant™ for Cloud Database Management Systems.

KLAS
ACCURATE HONEST IMPARTIAL

KLAS, which evaluates IT systems in the healthcare industry, put InterSystems in top rankings for interoperability and for electronic medical record (EMR) systems.
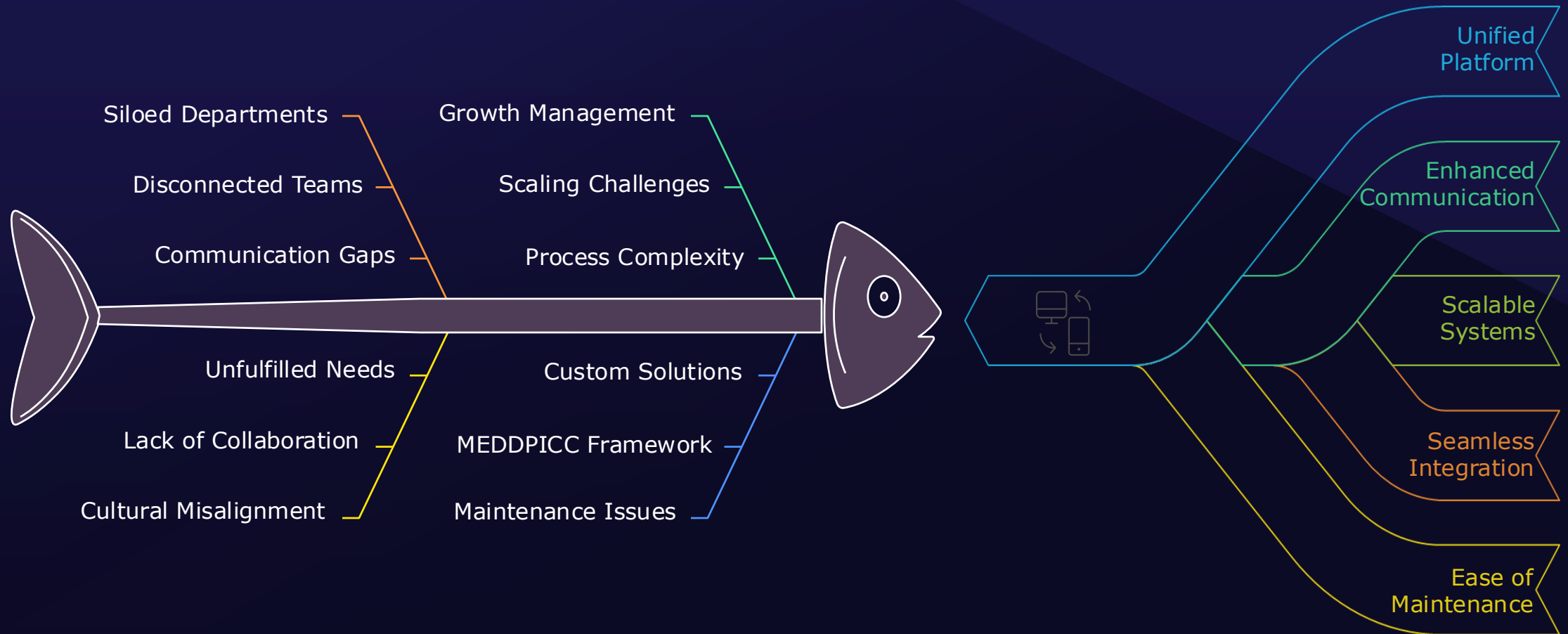
Business Challenges

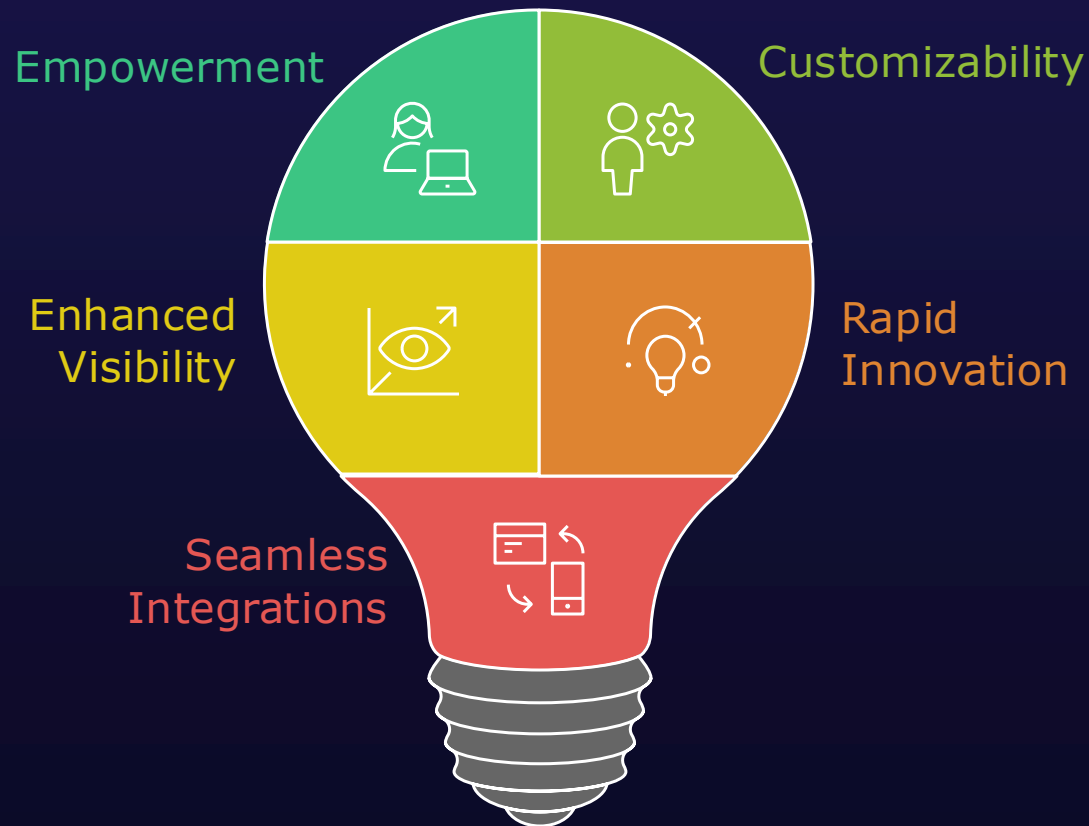# Business Challenge

Pega Solution

Pega-driven Transformation

Siloed Departments

Growth Management

Disconnected Teams

Scaling Challenges

Communication Gaps

Process Complexity

Unfulfilled Needs

Custom Solutions

Lack of Collaboration

MEDDPICC Framework

Cultural Misalignment

Maintenance Issues

Unified Platform

Enhanced Communication

Scalable Systems

Seamless Integration

Ease of Maintenance

Solution

How Pega helped InterSystems streamline Sales

Pega Platform Benefits

Empowerment

Customizability

Enhanced Visibility

Rapid Innovation

Seamless Integrations

Pega Implementation Process

Start with Agile Methodology

Global Needs Assessment

Unified Process Development

Feedback and Iteration

Integration with JIRA

Company-Wide Collaboration
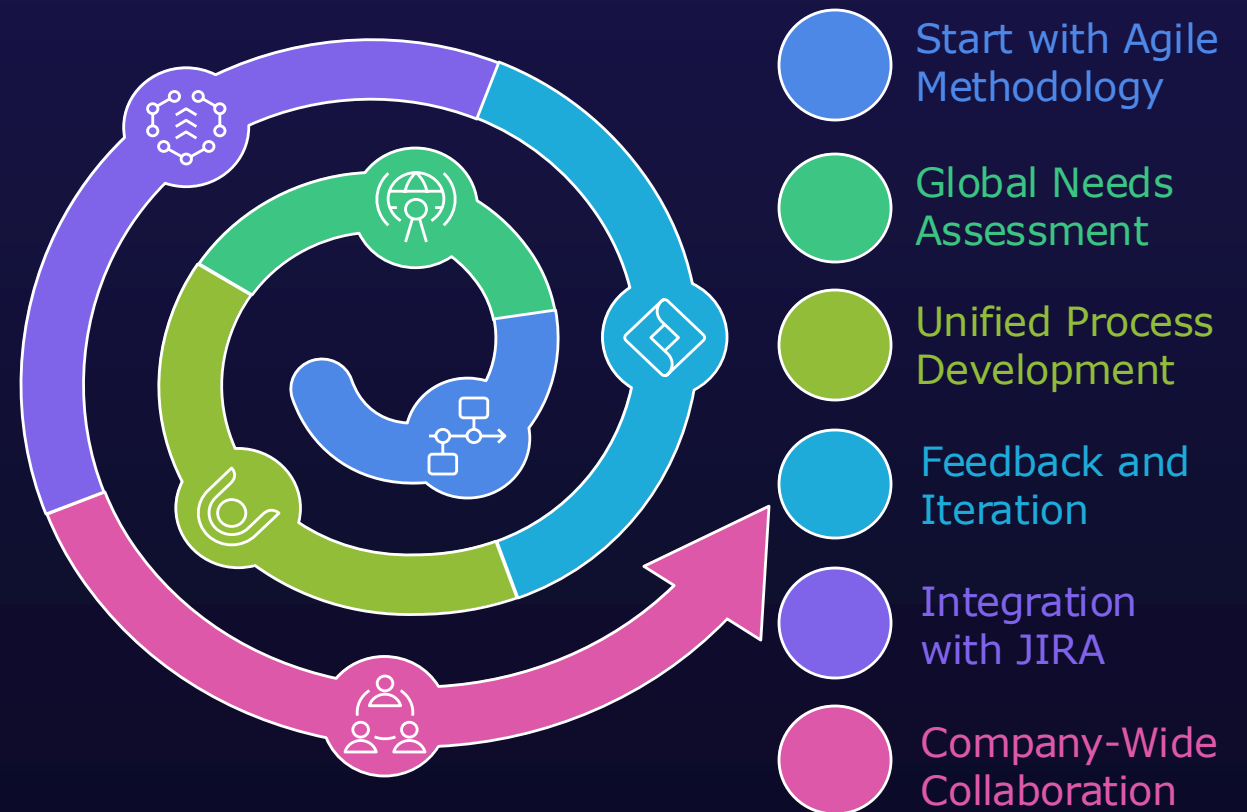
InterSystems & Pega Timeline

2019 — **Global Requirements Building**

All regions contribute needs and vision on implementing a true customer focused CRM solution with Pega

2020 — **Migration from Salesforce to Pega**

Launch of new system with agile approach
Sprint based development, prioritization, MVPs, and global sprint reviews

2021/22 — **Marketing & Sales Automation Connected**

3rd party integrations
Internal integrations
NBA development

2023/24 — **New Global Alignment on Sales Process**

CRMBI deployed - IRIS backed data lake for integrated systems
Building unified reporting systems run on Angular and InterSystems IRIS
Forecasting / Pipeline / MEDDPICC / Quota

2025 — **Cloud Migration**

Pega GenAI
Mobile

Change Management & Adoption

Key Outcomes

CRM Challenges & Outcomes

Challenge	Outcome
• Pipeline Velocity	• 30% Increase - 1600 Deals Closed in 2024
• Silos / Gaps	• Pega is the Source of Truth
• Activity Capture	• Up over 600% since 2023
• Win / Loss Analysis	• Better Targeting / Close Deals Earlier
• Forecasting / Pipeline	• Better Accuracy / Cadence / Review
• Top of Funnel	• Measurable Results -> Driving KPIs
• Change Management	• Highlighted Value to Drive Adoption

Lessons Learned

Looking Ahead
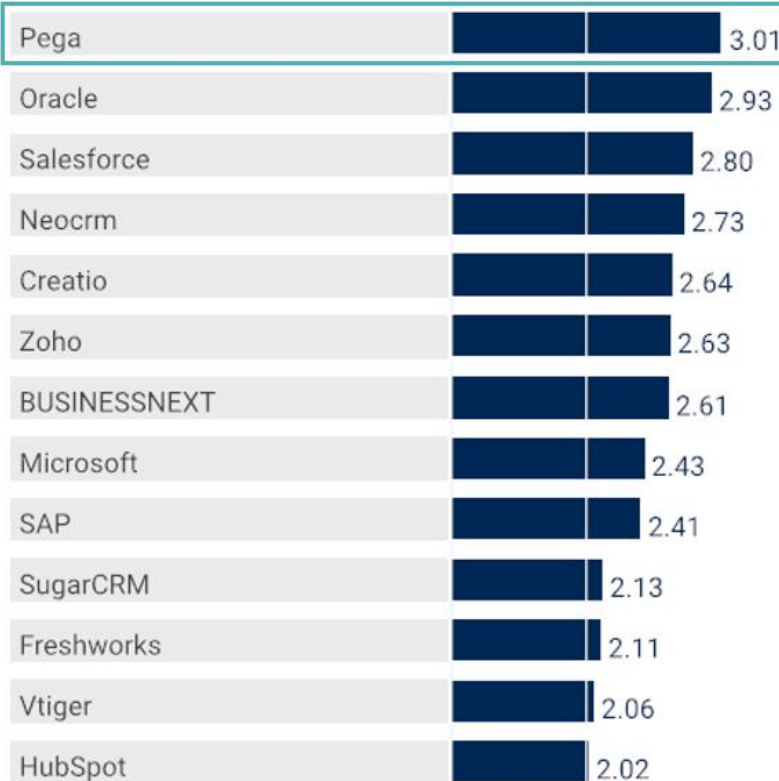
Key Takeaways

InterSystems®
Creative data technology

Thank You

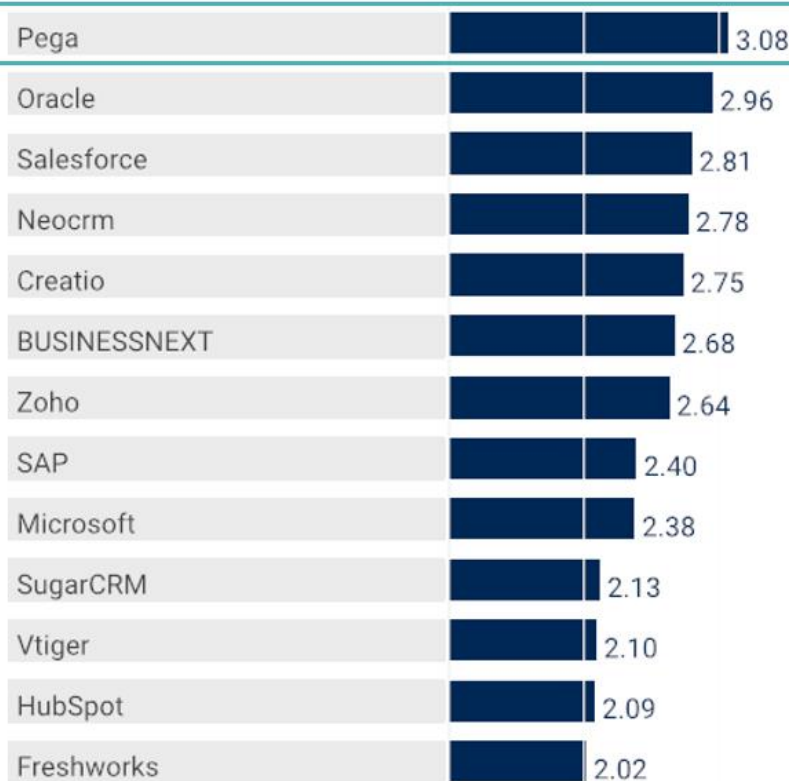## Q & A

Pega Sales Automation: #1 solution in Gartner Critical Capabilities report

Product or Service Scores for B2B Sales

Pega	3.01
Oracle	2.93
Salesforce	2.80
Neocrm	2.73
Creatio	2.64
Zoho	2.63
BUSINESSNEXT	2.61
Microsoft	2.43
SAP	2.41
SugarCRM	2.13
Freshworks	2.11
Vtiger	2.06
HubSpot	2.02

Product or Service Scores for B2C Sales

Pega	3.08
Oracle	2.96
Salesforce	2.81
Neocrm	2.78
Creatio	2.75
BUSINESSNEXT	2.68
Zoho	2.64
SAP	2.40
Microsoft	2.38
SugarCRM	2.13
Vtiger	2.10
HubSpot	2.09
Freshworks	2.02

Product or Service Scores for Indirect/Relationship Sales

Pega	3.20
Oracle	3.19
Salesforce	3.05
Neocrm	2.91
Creatio	2.86
Zoho	2.81
BUSINESSNEXT	2.78
SAP	2.47
Microsoft	2.39
SugarCRM	2.34
Vtiger	2.18
Freshworks	2.08
HubSpot	N/A
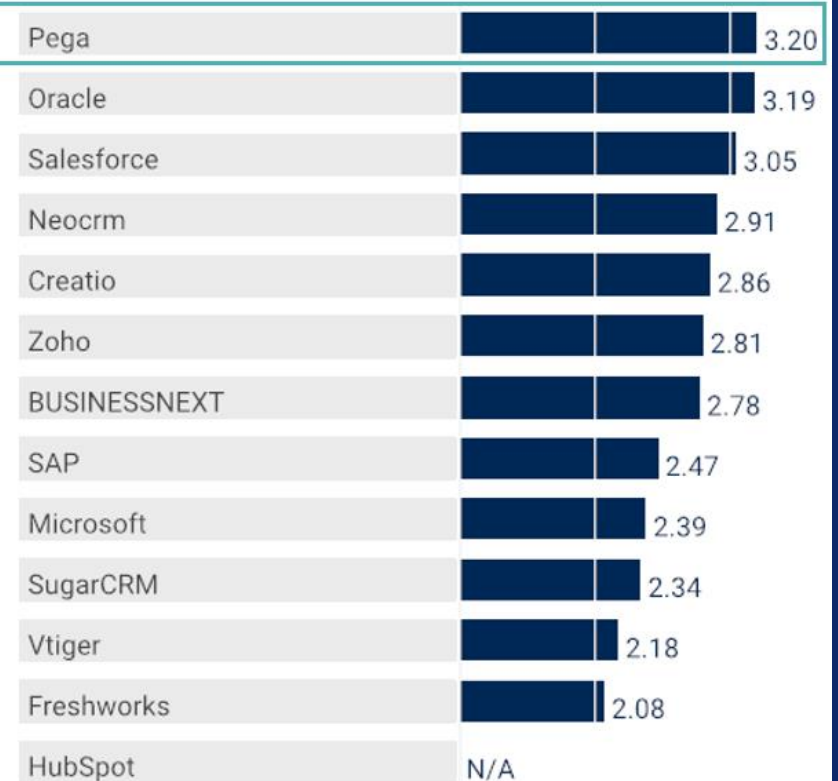
As of 8 August 2024

Gartner

Learn more at the Pega Sales Automation Booth

Your revenue growth starts here