

# Excellus BlueCross BlueShield:

## Transforming Customer Experience with Pega + AI

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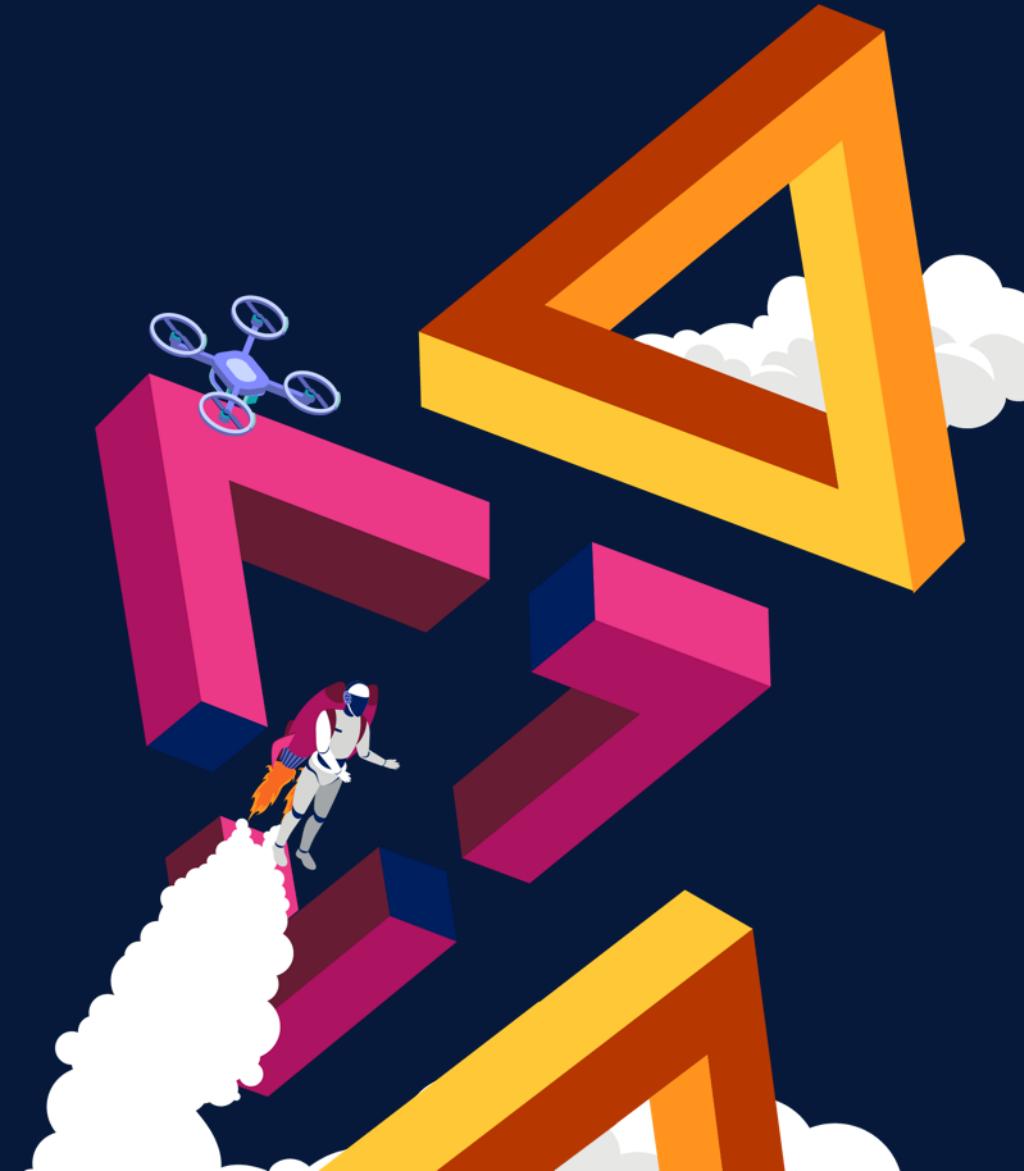
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# Agenda

- 01** Cognizant: Trusted Pega Partner 
- 02** Excellus BCBS 
- 03** Excellus BCBS Objective 
- 04** Bringing Pega in the Landscape 
- 05** Accomplishments & Next Steps 
- 06** Technical Solution and Architecture 
- 07** Best Practices and Lessons Learned 
- 08** Testimonials 



# Cognizant: Trusted Pega Partner for Digital Excellence



**Founded**  
1994  
(Nasdaq: CTSH)



**270+**  
Global offices



**336,800+**  
Associates



**Revenue**  
\$19.7B in FY 2024



AMERICA'S  
GREATEST  
WORKPLACES FOR  
DIVERSITY BY  
NEWSWEEK



EMPLOYER OF  
CHOICE ON THE  
2024 AMERICAN  
OPPORTUNITY  
INDEX



FORTUNE LIST OF  
AMERICA'S MOST  
INNOVATIVE  
COMPANIES 2024



TOP EMPLOYER IN  
EUROPE FOR  
the 10th  
CONSECUTIVE  
YEAR



WORLD'S BEST  
EMPLOYER  
BY FORBES



AMERICA'S  
MOST  
RESPONSIBLE  
COMPANIES  
2025 BY  
NEWSWEEK



#16  
RECOGNIZED FOR  
WORK WELLBEING  
BY INDEED



WALL STREET  
JOURNAL'S 250  
BEST-MANAGED  
COMPANIES OF  
2024



**Leader in Healthcare**

**23 of the top 25** healthcare plans

**5 of the top 6** US PBM companies

**7 of the 10 top 5-star** Medicare  
plans



**Top Partner of Pegasystems**

**26+** Years of partnership

**Most Experienced Pega Practice**

**Largest Pool of Certified Talents**



**A nonprofit health plan** serving the communities of upstate New York for over 90 years.



We are the **largest commercial payor** in Upstate NY, serving 31 counties.

Our **4500+ employees** live and work in the communities we serve.

## Our mission

To help people in our communities live healthier and more secure lives through **access to high-quality, affordable health care.**

## What we offer

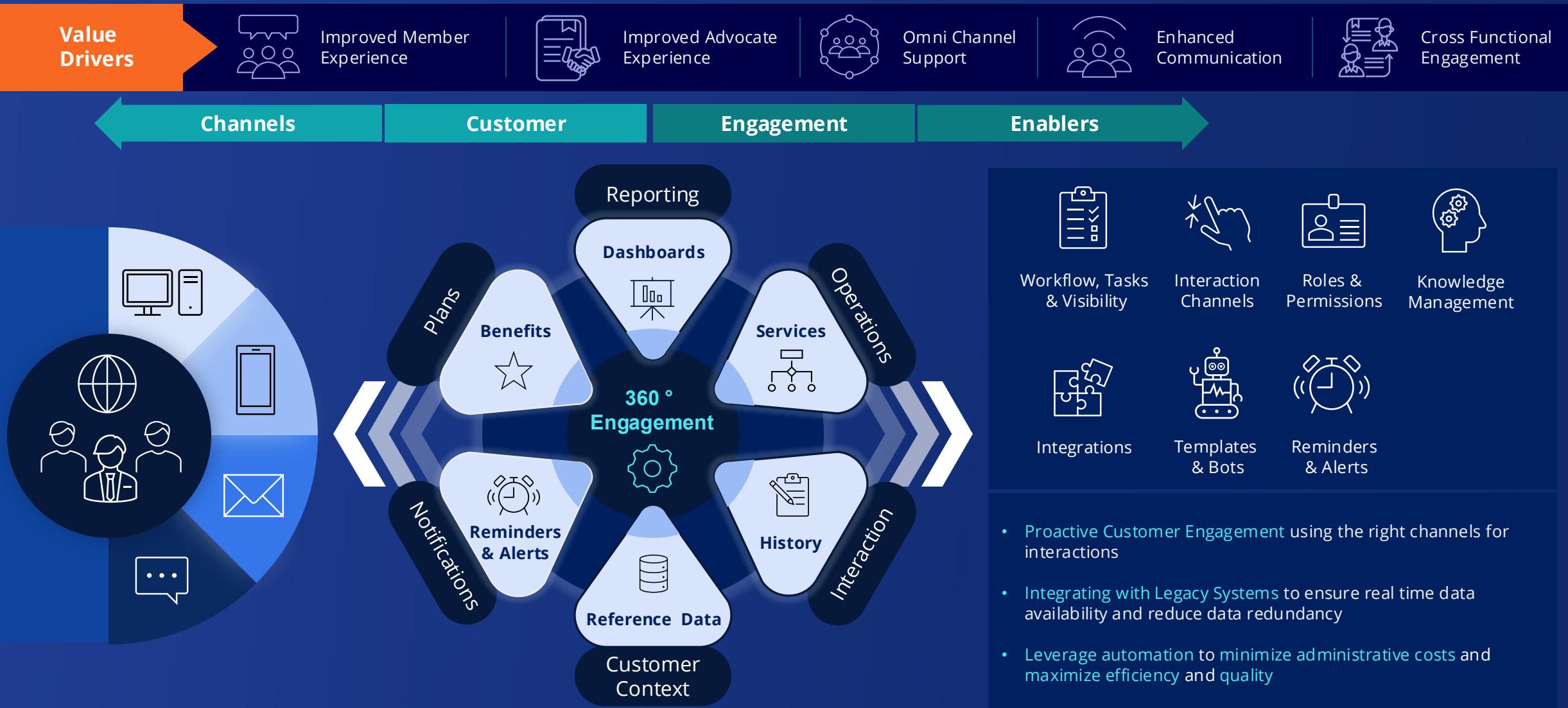
**Medicare** coverage for those 65+ or with disability, regardless of income

**Plans that help businesses** offer health, dental and wellness to employees

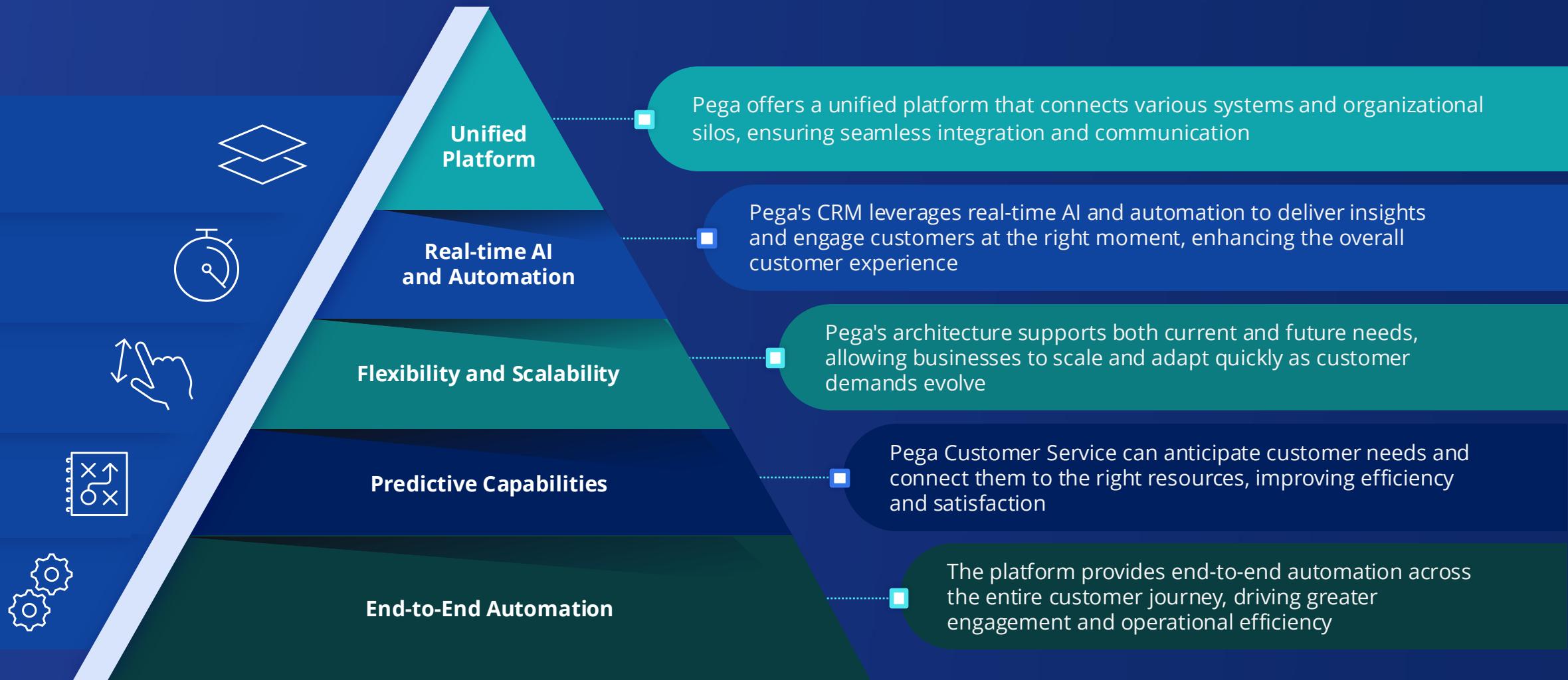
Low or no cost plans for **individuals and families** based on eligibility

**Comprehensive** network of local & nationwide hospitals and physicians, plus provider partnerships

# The Objective



# Bringing Pega in the Landscape



# Accomplishments & Next Steps

## Success Factors

**Single source of truth** of Customer information from across multiple applications



01

**Automation capabilities**- Automatic case creation- Genesys integration



02

**Accurate process flows** defined for Member and Provider Interactions



03

Enabled the business users to **drive the business logic** in the application using delegated rules



04

**Personalized suggestions** in terms of gaps, online account opening and/or sale of Medicare plans incorporated in the application



05

## Next Steps

Integration with multiple workflow applications providing a holistic view of customer's information

Personalized service to customer though CDH capabilities

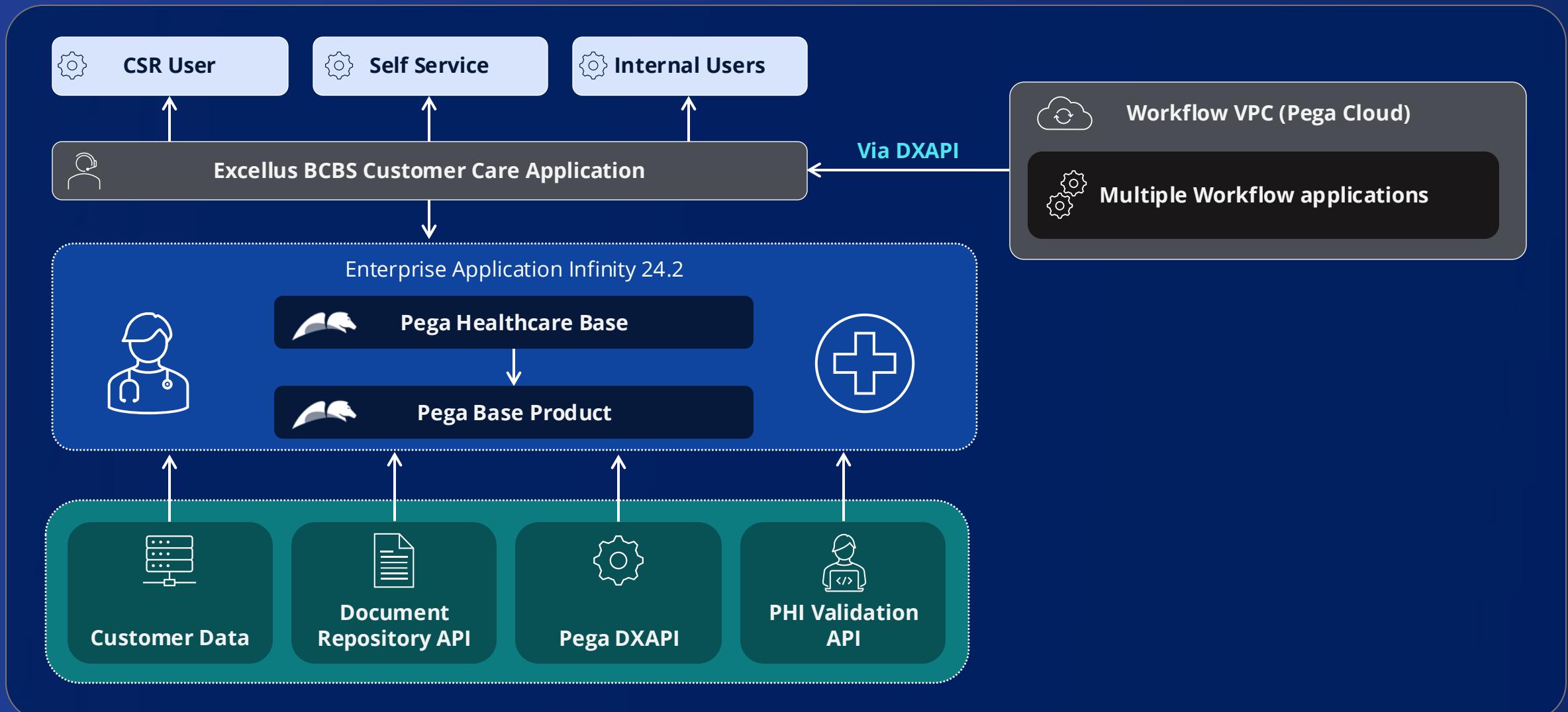
RPA integration to automate manual and time intensive work

Leverage Gen AI capabilities to enhance customer experience

- Voice AI
- Knowledge management

Also, with the new technology this foundation has afforded us, we are rethinking our proactive outreach to our customers and ensure we're communicating in an efficient and scalable process

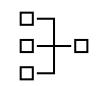
# Technical Solution and Architecture



# Best Practices and Lessons Learned



**Discovery Phase with Cognizant** has been instrumental in establishing a solid foundation for our business needs from the product



**Efficient System Transition to Pega** with phase wise approach and effective migration. **Prioritize the MVP release and ensure a strong foundation with incremental feature updates.**



**Primary challenge lies in integrating with the CCAAS platform**



**A robust UAT process enabled us to identify usability issues earlier in the development phase. Training live advocates** on the new system without disrupting their daily responsibilities



**Strategic System Upgrade Planning** to avoid upgrading two systems simultaneously



**Prioritize our releases by creating a vision and building a strong foundation,** with incremental improvements, and then focus on transformational work



# Q&A





# PegaWorld

JUNE 1-3, 2025 | LAS VEGAS



PEGAWORLD.COM