



JUNE 1-3, 2025 | LAS VEGAS

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# Making every employee your best employee:

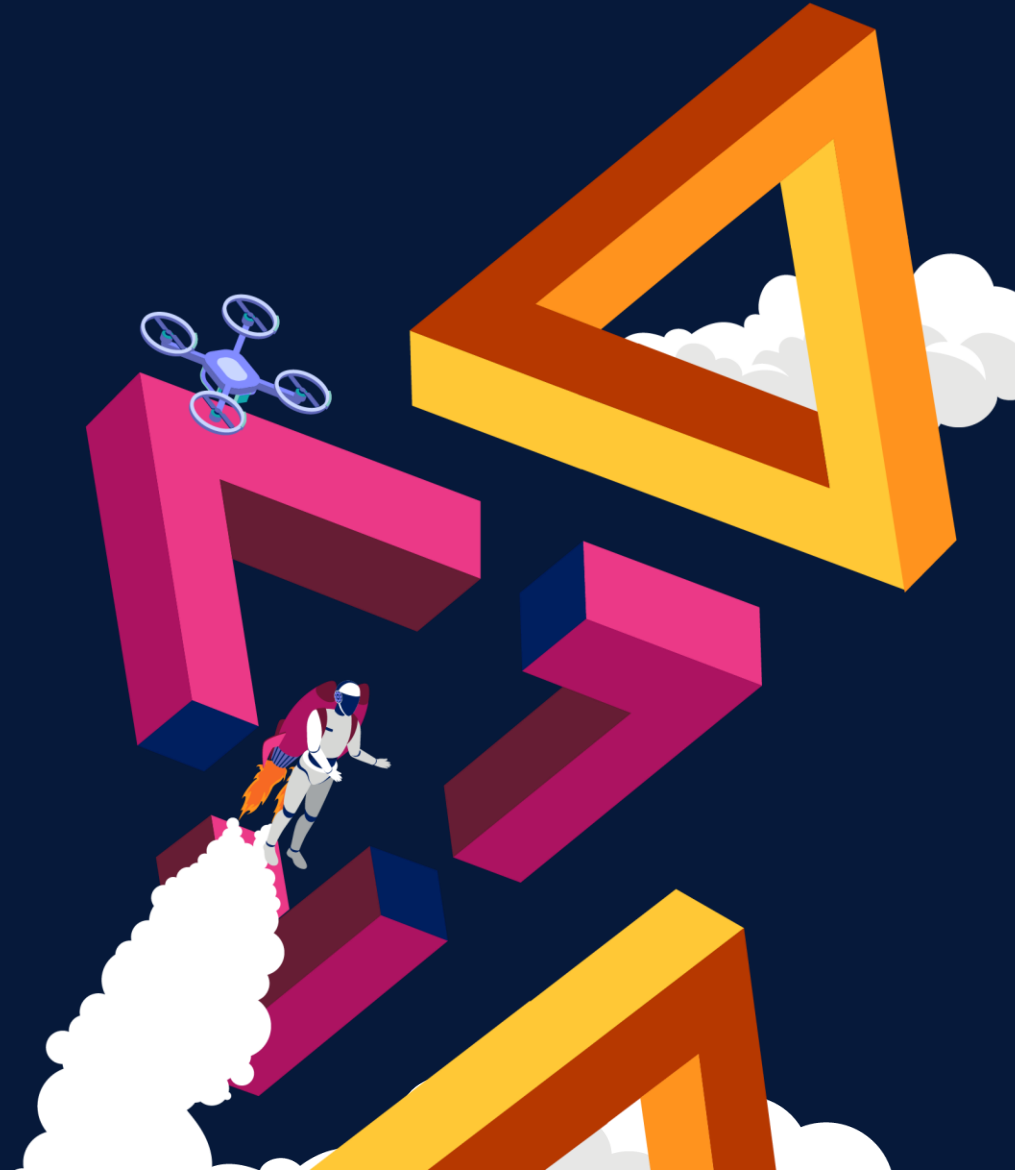
How AI can eliminate blockers to your success

Rebecca Miller

Snr. Manager Product Strategy

Simon Thorpe

Director of Product Marketing





**Rebecca Miller**

Sr. Product Strategy Manager

*Pegasystems*



**Simon Thorpe**

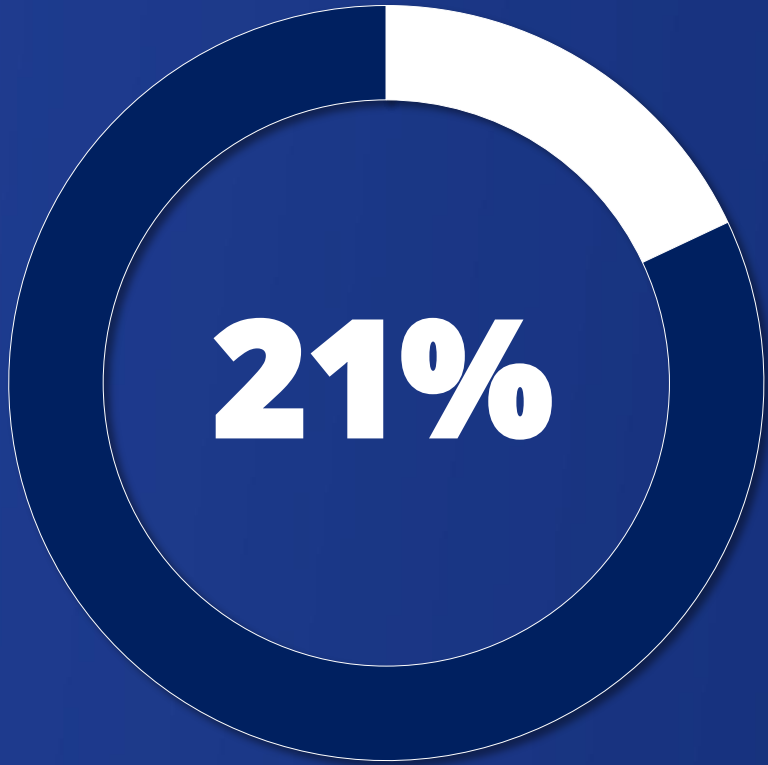
Director of Product Marketing

*Pegasystems*

# The current state of employee experience

- Transformation of the front-office
- **More AI and Automation** to offload repetitive tasks
- Need for **new skills** & **high emotional intelligence**
- Higher customer expectations
- Pressure to do more with less





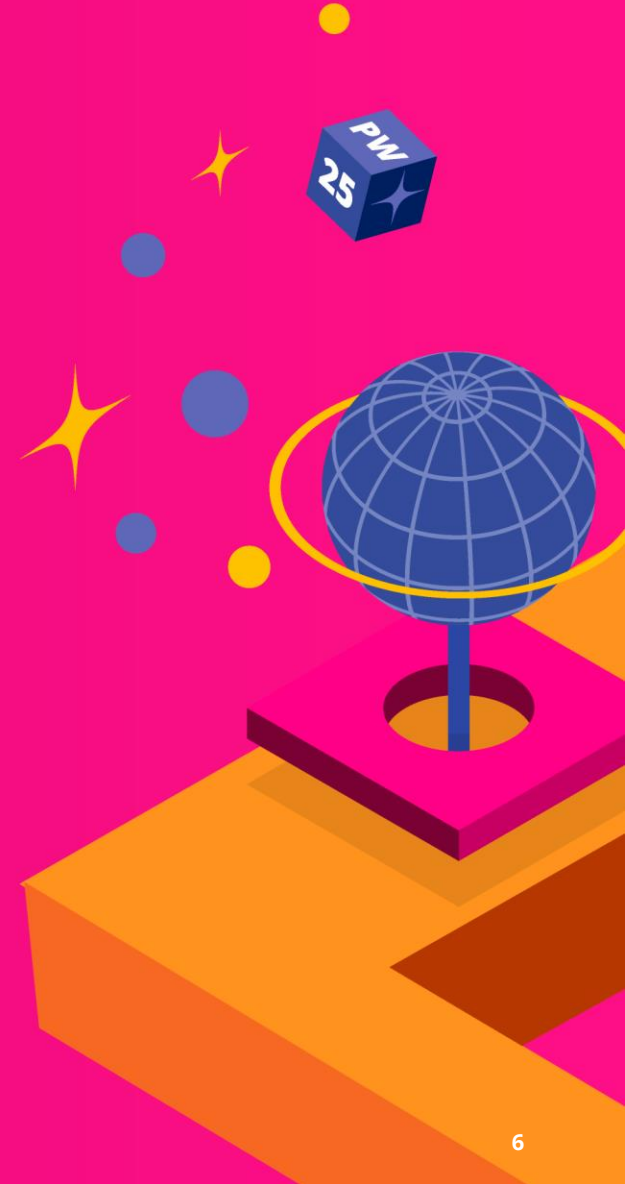
## Global employee engagement decline in 2024

This marked only the second decline in engagement in the past 12 years — a worrying sign for organizations already struggling with productivity.

GALLUP®



The power of  
**Marginal Gains**









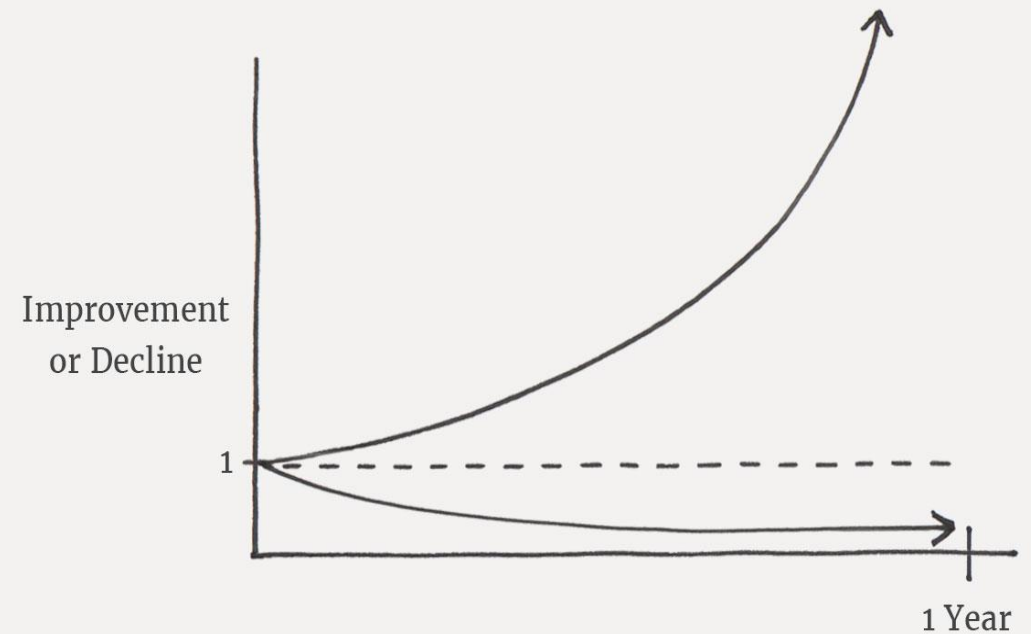


- Redesigned the bike seats
- Alcohol on the tires
- Heated shorts
- Massage gels
- Pillow & mattress
- Truck interior

# The Power of Tiny Gains

1% better every day  $1.01^{365} = 37.78$

1% worse every day  $0.99^{365} = 0.03$





# What if you could make every employee your best employee?

PEGA Patient

File insurance claim Verification Interaction summary

Always Know The Next Best Step to Take

Immediately Understand The Context of a Workflow

Make Every Customer Interaction Meaningful

Instantly Unlock Answers Trapped Within Webpages and PDFs

Anticipate Customer Needs

Quickly Adapt to Product, Regulatory, and Market Changes

Member M206

Status IN PATIENT

DOB Apr 2, 1991

Age 29

Gender Female

Policy 1 Medical

Policy 2 Dental

Coverage re-adjustment Due in 3 days • Medium priority

Co-pay re-adjustment Task in ACCT-2913 • Due in 4 days • High priority

View all 5

Pulse

conversation

Lamas in SR-680 Sent to 24 members

Here's a copy of the verification letter we need. Elizabeth Peterson sent it over on April 17, 2020.

Thanks, Sidney Lamas

Claim verification letter

Comment 1 Like 3

Aya Bhiladvala I agree 2m ago

Add a comment

Team

View all 6

Prediction

Probability of missing SLA 70.93%

Learn more

chat

Elizabeth, my name is Tadd, I have a billing question, is this correct?

Yes, I was able to change my billing date, but I'm not sure how much I'll owe on my next bill.

I'll be happy to clarify, let me share those details with you.

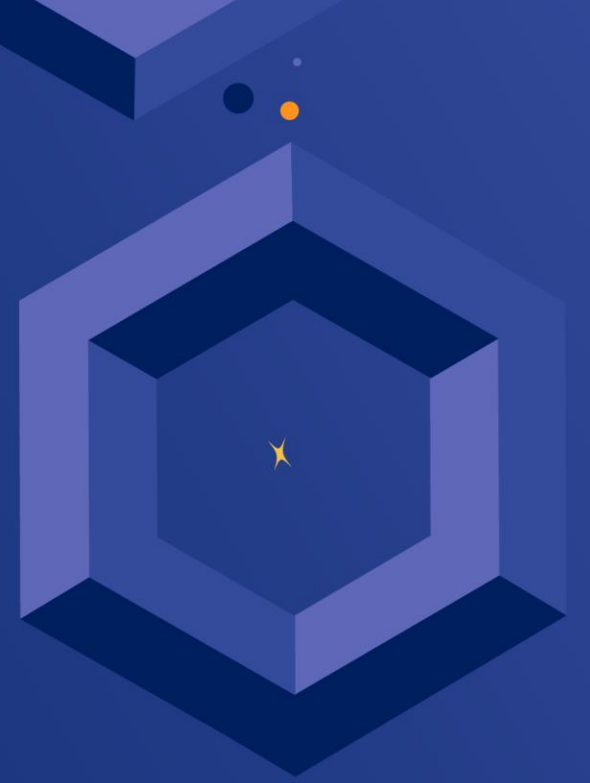
You know, you're eligible for a payment extension?

Really?

Anything else I can help with?

Phrases

# Artificial Intelligence: **The Great Equalizer**

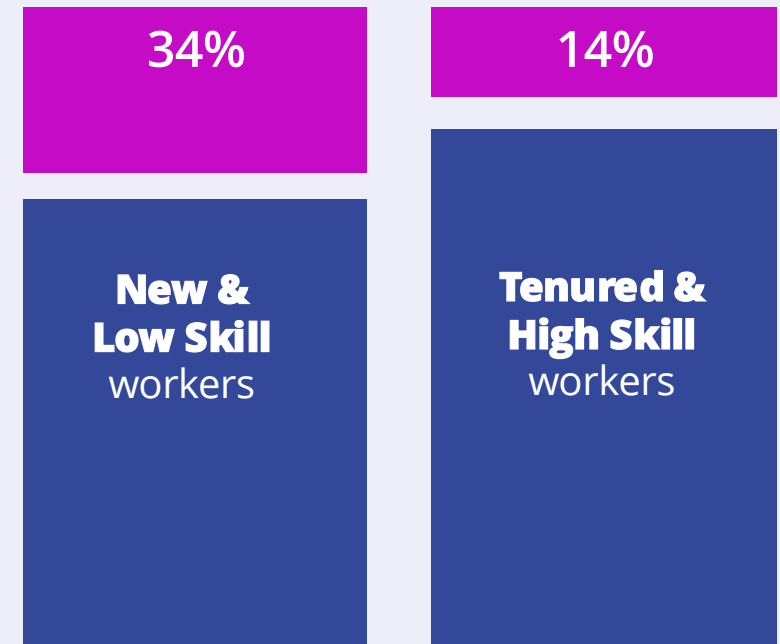


# Early adopters are learning fast

# 34%

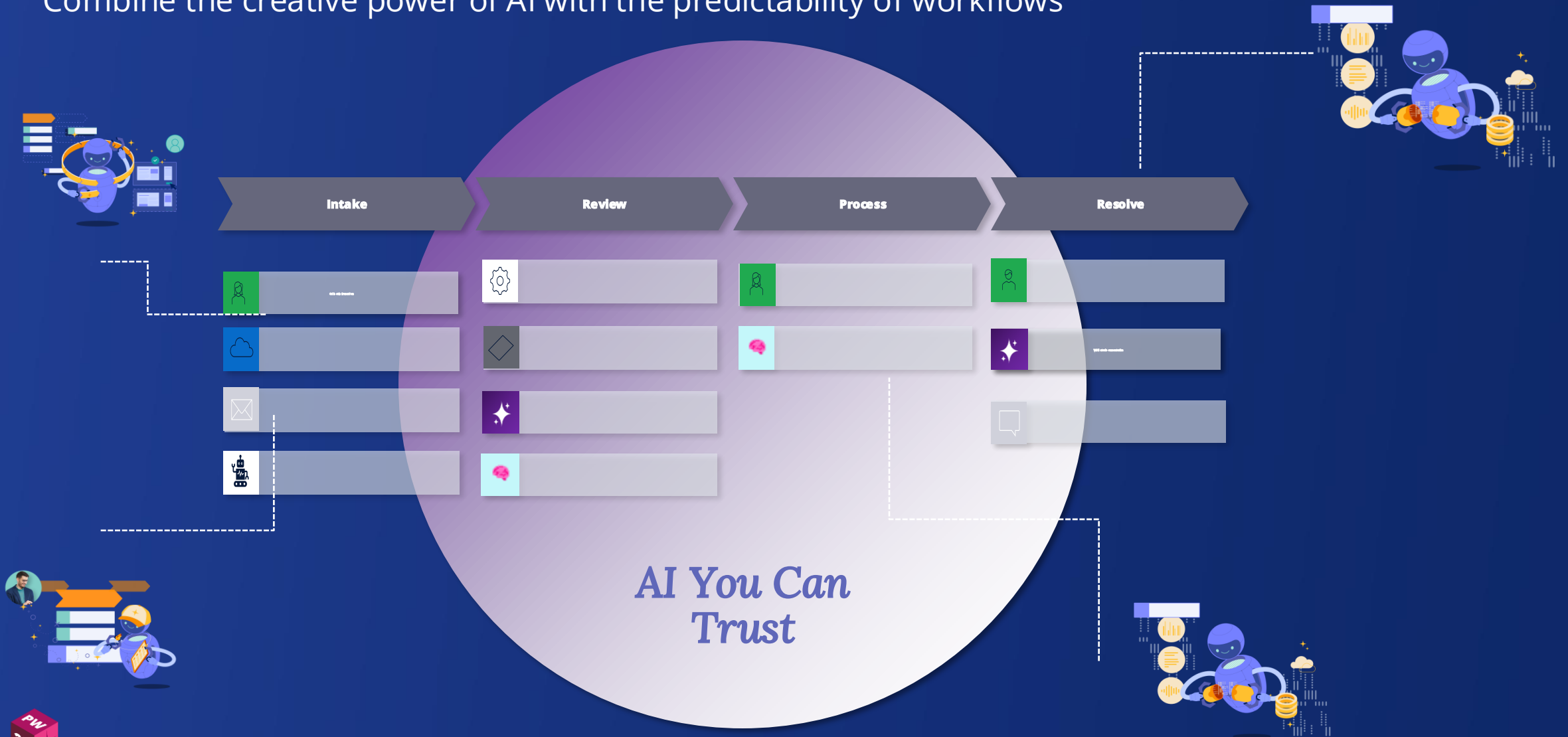
Improvement in call resolution for novice and low-skilled workers;  
**14% improvement for all agents**

- National Bureau of Economic Research



# But, AI alone isn't enough.

Combine the creative power of AI with the predictability of workflows





*Top 5 ways*  
**To infuse AI into your business**



# Make every employee your best employee



**Customers**



**Service**



**Sellers**



**Marketers**



**Operations**



**Developers**

# Unlock employee potential with Pega Coach Agent

Scale enterprise expertise  
and insights

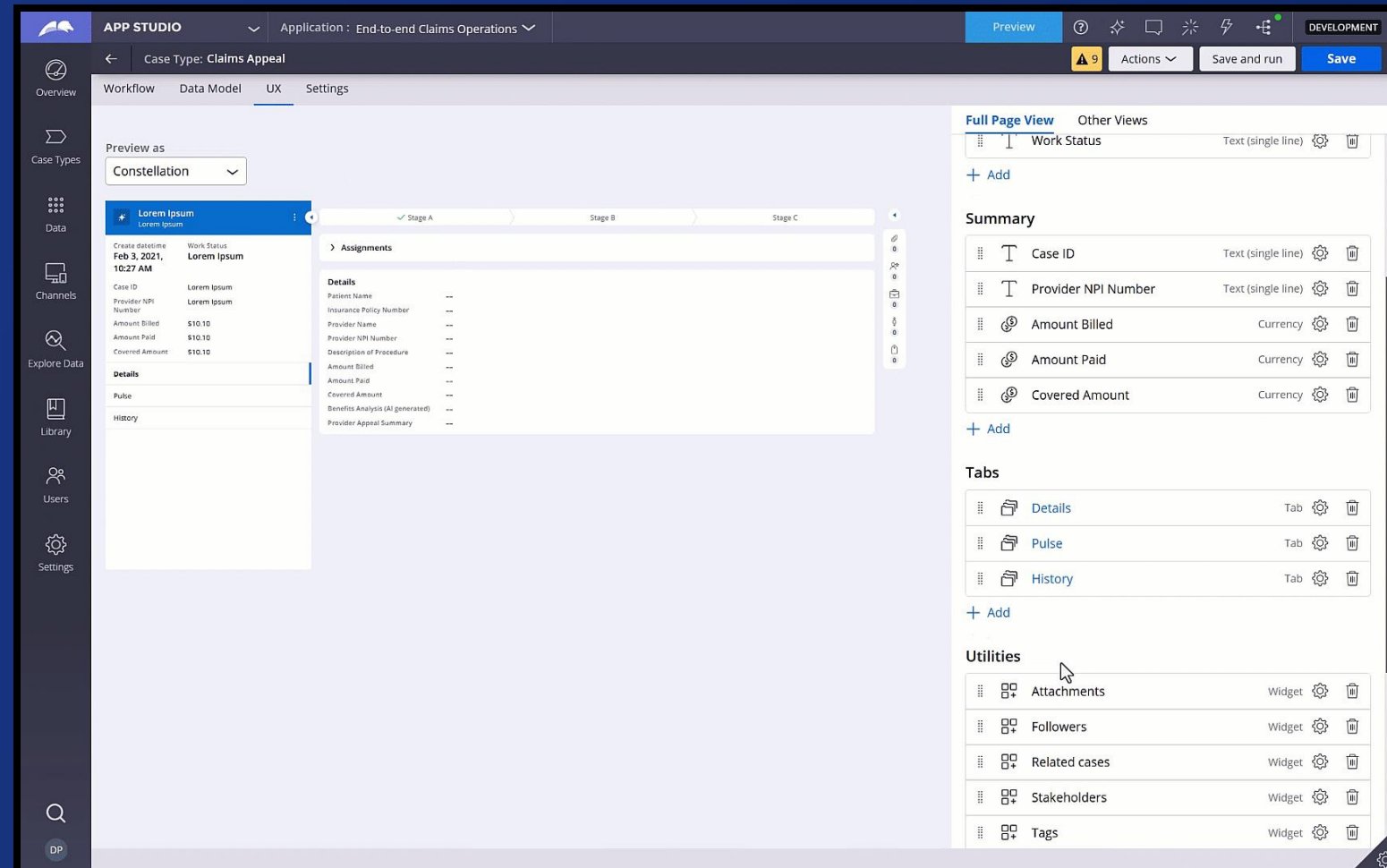
with customized coaches

Identify and eliminate blockers  
and blind spots

with targeted insights and recommendation

Safely and securely deliver  
personalized knowledge

with role-specific controls



# *Empower* every CSR to excel in every interaction

RF Thank you for your help. Have a great day!  
Assistance score: 10  
Professionalism score: 10  
Efficiency score: 10  
Customer satisfaction score: 10

Strengths:

- CSR adhered to the customer's conditions not to mention any addresses until asked
- CSR professionally asked for the new address
- CSR was efficient in making the changes to the customer's account

Areas of improvement:

- CSR could have been more reassuring by echoing the customer's concerns
- CSR could have been more efficient by asking for the new address earlier in the conversation

Feedback:

Overall, the CSR did a good job of addressing the customer's concerns and providing a helpful solution. The CSR's communication was clear and professional, and the customer was satisfied with the outcome.

02:48:17 PM

### Add scenarios

Simulation Scenario \*

Ask the customer service representative to update the address on your account, check the balance of your credit card statement, and finally inquire about any product offers entitled to you.

Queue Selection (Optional)

Training

Personality (Optional)

Nice, friendly

Pain Points (Optional)

Gets frustrated with spelling mistakes

Cancel Add

**Simulate “live” customer interactions**  
**in a risk-free environment**

**Reduce onboarding time**  
**With multiple training scenarios**

**Identify coaching opportunities**  
**With real-time feedback and suggestions for improvement**



# Customer Service *Simulator Experience*

- **Experience firsthand** how Pega Customer Service & AI can improve CS operations
- **Engage in hands-on practice** as a 'Voice or Chat Agent'
- **Receive real-time feedback** and performance scores
- Available now in the **Innovation Hub**



# *Unleash* productivity with Pega Automation Agents

**Arm employees with  
automated, AI-powered  
assistance**

across every workflow & task

**Get more done faster  
by streamlining communications**

**Make communications smarter**

with full context & on-brand messaging



# Make meeting preparation *seamless*

## Tailor conversations with contextual talking points

Based on individual sentiment and relationship insights

## Unlock critical insights

With on-demand briefings

## Save time and reduce manual research

With correspondence timelines of previous meetings and emails

PEGA Sales Automation

Search: All Search...

Conversation on Surveillance Cameras and Options App-16009

Start time: Jan 19, 2024, 9:00 AM  
End time: Jan 19, 2024, 9:30 AM  
Location: Zoom  
Status: RESOLVED-SCHEDULED

Pulse

Meeting description

Prepare for meeting

Attendees: 4  
Leads: 0  
Contacts: 2  
Opportunities: 1  
LinkedIn Sales Navigator  
Accounts: 1

Prepare for meeting Correspondence timeline

Attendees 3 results

Abel Amigon  
Senior Manager, Purchase  
Strong relationship  
Negative sentiment  
Accepted RSVP

Michael Scott  
Senior Executive, Purchase  
Weak relationship  
No interactions  
Accepted RSVP

Sara Connor  
Lead Consultant, IT  
Weak relationship  
Negative sentiment  
Declined RSVP

Action items

Review Michael Scott's LinkedIn profile to familiarize yourself as they're a new meeting attendee you haven't interacted with before Task Go

Send email to Abel with comparative analysis of competitor products and pricing Email Go

To prepare for the upcoming meeting, it is recommended that you review the Seetec Competitor Battle Card Task Go

Consider inviting Jeff Green to the meeting as they have a stronger relationship with Sara than you Task Go

Talking points and insights

Insights for future discussions with the customer

- Introduce the team to Michael Scott as this is their first meeting with us
- Abel's sentiment has been trending lower since the previous meeting due to pricing concerns
- Acme Software was in the news this week for a stellar earnings report
- Give an update on the high priority SR for their camera system as it's a risk to closing the deal
- In an email yesterday, Sara requested to discuss an updated delivery timeline on the revised contract

Opportunities 1 result

Name	Amount	Stage	Forecast category
Ultra 265 Surveillance KIT for Acme solutions	\$110,010.00	Qualification	Commit

# Go from idea to app in a flash with Pega Blueprint™

## Accelerate app design

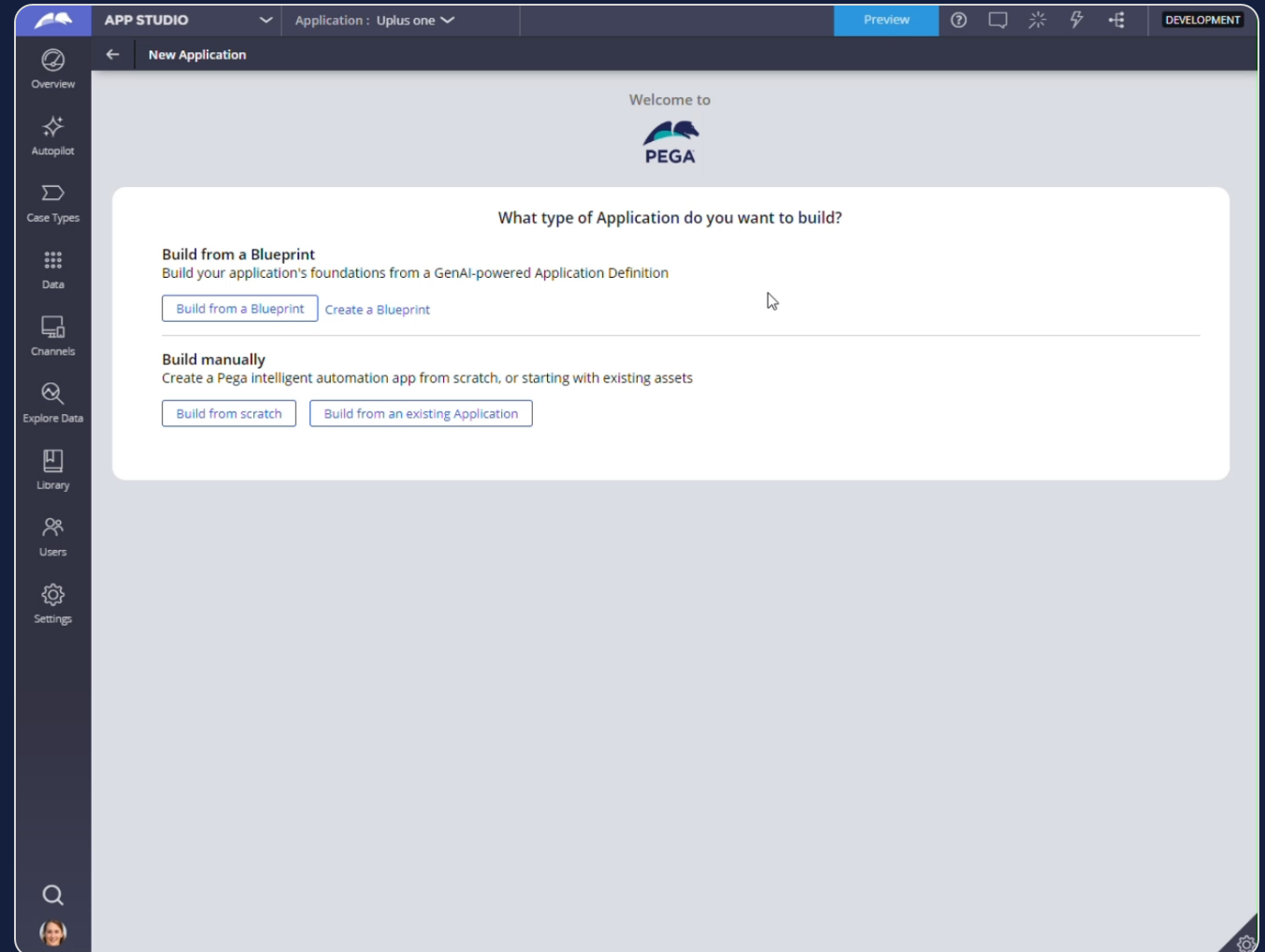
By reducing the manual effort and time spent on design and documentation

## Automate tedious work

By automating repetitive and complex configuration tasks

## Bridge the business/IT gap

By translating business intent into clear, actionable application models





# Ready to Transform Your Workforce? *Start Here*

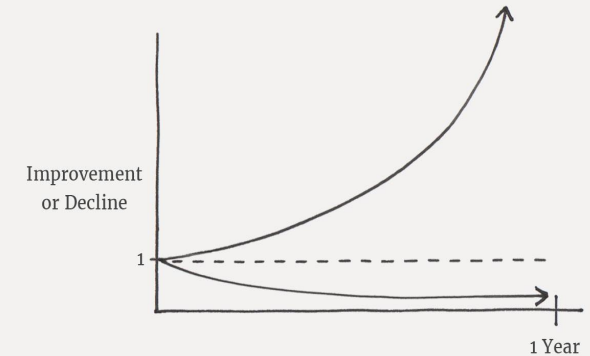


# Key takeaways

- Employee experience (EX) is undergoing a massive transformation – pressure to do more with less
- The time to start innovating is NOW
- AI Innovation needs predictability and control
- Marginal gains = Maximum Success
  - Focus on one process/workflow first

## The Power of Tiny Gains

$$\begin{aligned} 1\% \text{ better every day } 1.01^{365} &= 37.78 \\ 1\% \text{ worse every day } 0.99^{365} &= 0.03 \end{aligned}$$





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