

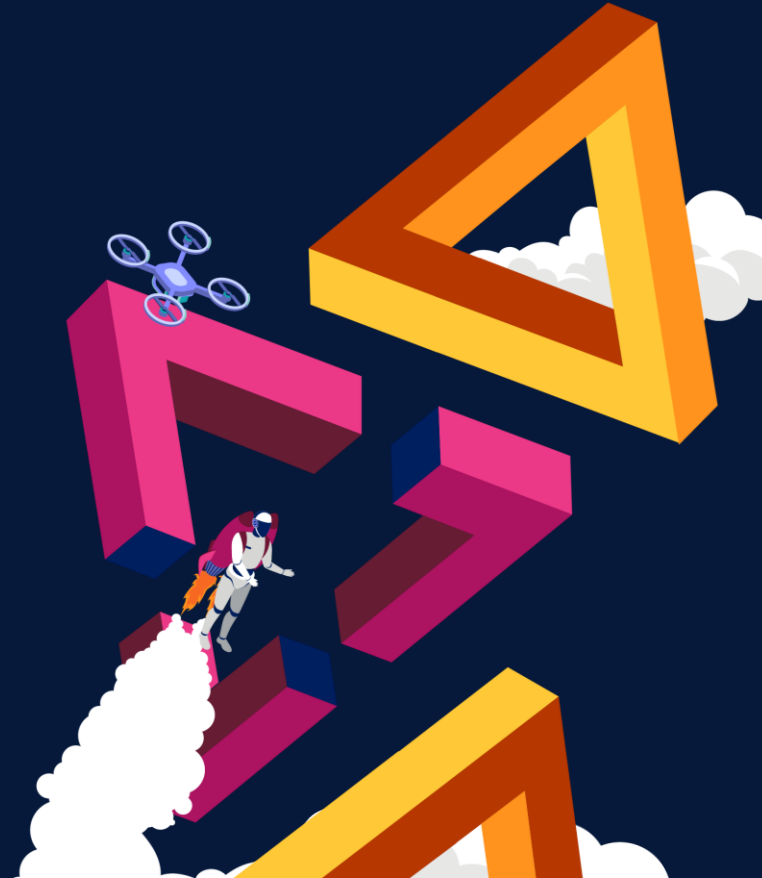


PegaWorld

JUNE 1-3, 2025 | LAS VEGAS

Rapid Response: Supporting Your Agent/Broker Networks

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Aflac is the No. 1 provider of supplemental health insurance products in the U.S. that works with a network of more than 40,000 agents and brokers.

We began our journey with Pega in 2017 — 34 applications in production, 4 in POC/build.

- Replaced legacy workflow solutions with Pega BPM
- Implemented Pega Underwriting to provide a proposal/quoting solution for Group Voluntary Benefits (VB)
- Replaced our “homegrown” call center application using Pega’s Customer Service framework and Digital Messaging

We provide Pega solutions across all P&Ls to include Aflac Individual VB, Aflac Group VB, Aflac Dental and Vision, and Aflac Corporate. In 2025, we will also expand into the Aflac Life and Disability space.

We’ve also used Pega’s App Factory to introduce citizen development in our annual Pegathon events. Today’s success story originated from a use case presented in Aflac’s 2024 Pegathon.

Business Problem Use Case

- Sales escalation process originated as a back-office database
- Transitioned to IT ticketing system which allowed submission by external customers
- Legacy ticketing system was replaced in 2024
- “New” system would require purchase of additional module at a significant investment (\$250K)
 - Privacy concerns
 - Security/role management complexities
 - Communications limitations

But.....Pega!!



What is SEMP?

Sales Escalation Management Portal

- Single point of entry for Aflac agents, brokers, and marketing leadership
- Hierarchical, structured escalation process
 - *Coordinator Escalation Process*
 - *Sales Resolution Office*
- Open channels for routine requests where no other formal channels exist
 - *Standard Requests/Business as Usual*

Customer Needs/Expectations:

1. Easy-to-use UI
2. Realtime dashboards/visibility
3. Communications

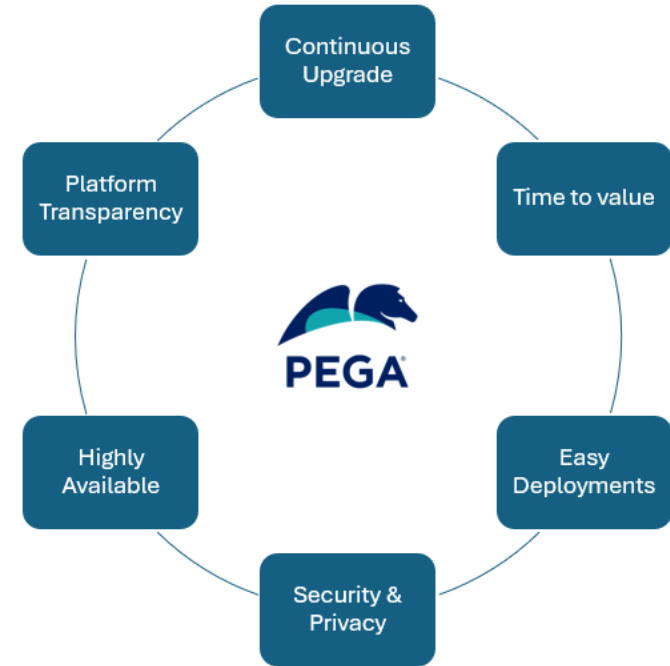
Business Needs/Expectations:

1. Workflow
2. Fully integrated
3. Role-based security and access controls
4. Robust reporting to include trending and root cause analysis

Leveraging Pega, Aflac was quickly able to respond to field operations' needs and help internal teams take immediate action — removing barriers for our producers as they service prospects and clients.

Value

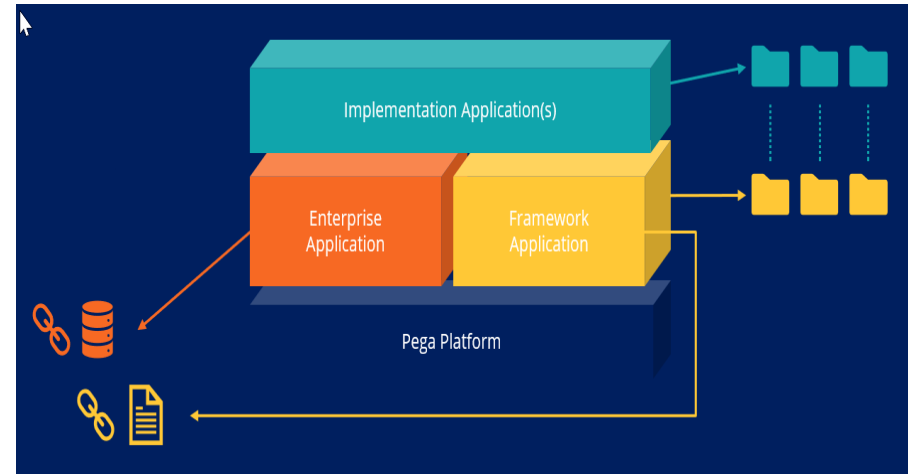
- Cost avoidance — \$250K
- Speed to market — 90 days development, full rollout 6 months
- Superior UI-driven experience
- Security and access control
- Dashboards and communication improvements
- New, transformative workflows
- Provides visibility for submitted escalations to sales leadership team
- Reduce follow-up inquiries and provides more accountability
- Communications (updates and resolutions) for each escalation housed in one centralized location
- Automated Tableau dashboards
- Root Cause analysis and trending allows for business process reengineering and improvements



Reuse

- SEMP rollout successful and highly praised
- Aflac Dental and Vision division was facing legacy stack crisis and needed a similar solution
- Pega's Situational Layer Cake facilitated the work
 - SEMP code was copied to develop TRAX
 - UI and Case Types tweaked to address business-specific needs
 - Role-based access controls and security defined for SEMP were foundational to TRAX
- Provides foundation for Pega BPM implementation
- 90 days to go live!

Traditional Situational Layer Cake



Results

- SEMP Survey
 - Annual survey conducted with field sales users showed highest growth in satisfaction across Aflac in two plus years.
- Aflac has two sustainable escalation processes with room for growth.
- Field agent and office worker productivity have increased, allowing us to focus on other initiatives. This will increase as we further reduce swivel chair and provide additional workflows in the future for business partners who currently lack Pega capabilities.



Q&A





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