



PegaWorld

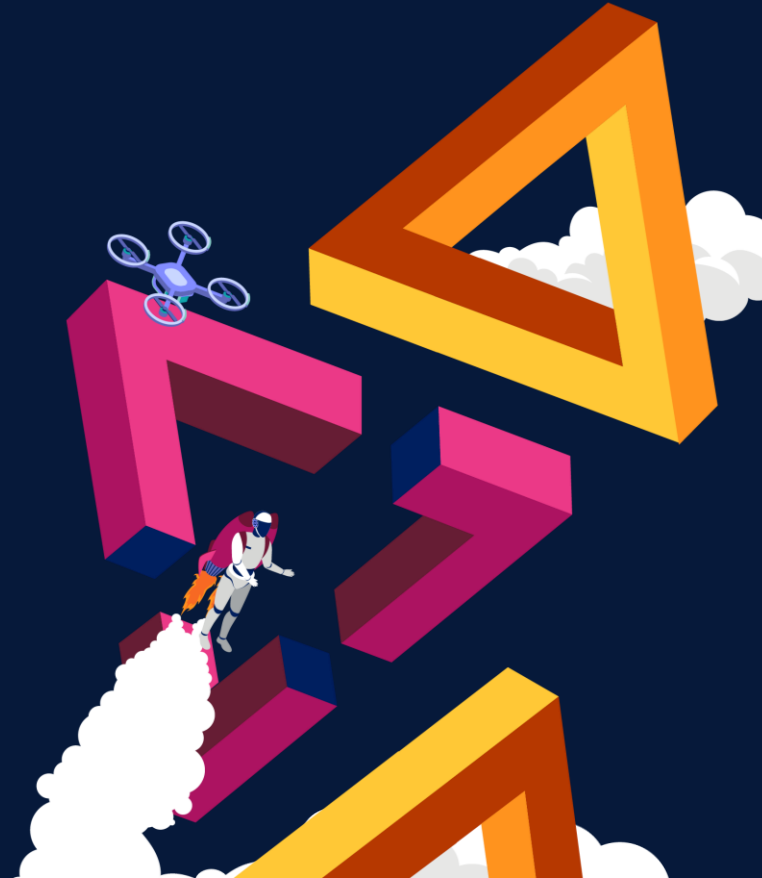
JUNE 1-3, 2025 | LAS VEGAS

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# RBC “PegaForce”: Transforming advisor experience through Pega and Salesforce Integration

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Director, RBC Wealth Management

Becky Meisenheimer  
Director, RBC Wealth Management



# Who we are

**RBC Wealth Management** is a top 10 full-service brokerage firm based on assets under administration and number of advisors in the US.

**2,200+** financial advisors

**192** locations in **42** states

**\$667B** total client's assets

RBC Wealth Management U.S.  
headquarters in Minneapolis, MN

\*AUA is as of January 31st, 2025  
(Q2 numbers are released on May 29<sup>th</sup>, 2025)



RBC Wealth Management, a division of RBC Capital Markets, LLC,  
registered investment adviser and Member NYSE/FINRA/SIPC



Rohit Gupta

Director, RBC Wealth Management

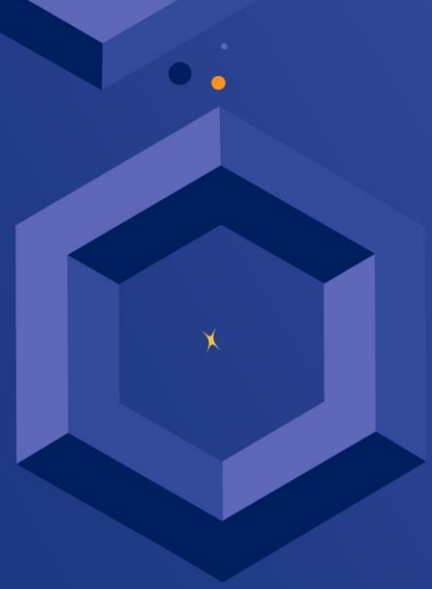


Becky Meisenheimer

Director, RBC Wealth Management Tech

Pega – Salesforce (SF)  
Integration supports a **unified  
desktop experience** for  
advisors by enabling them to  
view and action workflow cases  
via Salesforce

Our Automation Vision



# Financial advisor wish list

- A single view of client accounts in one system
- Reduced navigation & clicks to action service requests
- Obtain status on service requests quickly
- Seamless collaboration between front, middle & back office
- Faster time to market for regulatory changes
- Competitive edge for recruitment and reduced attrition of existing financial advisors



# PegaForce



## Objective

Provide 360-degree view of client to advisors by establishing a unified platform

## Approach

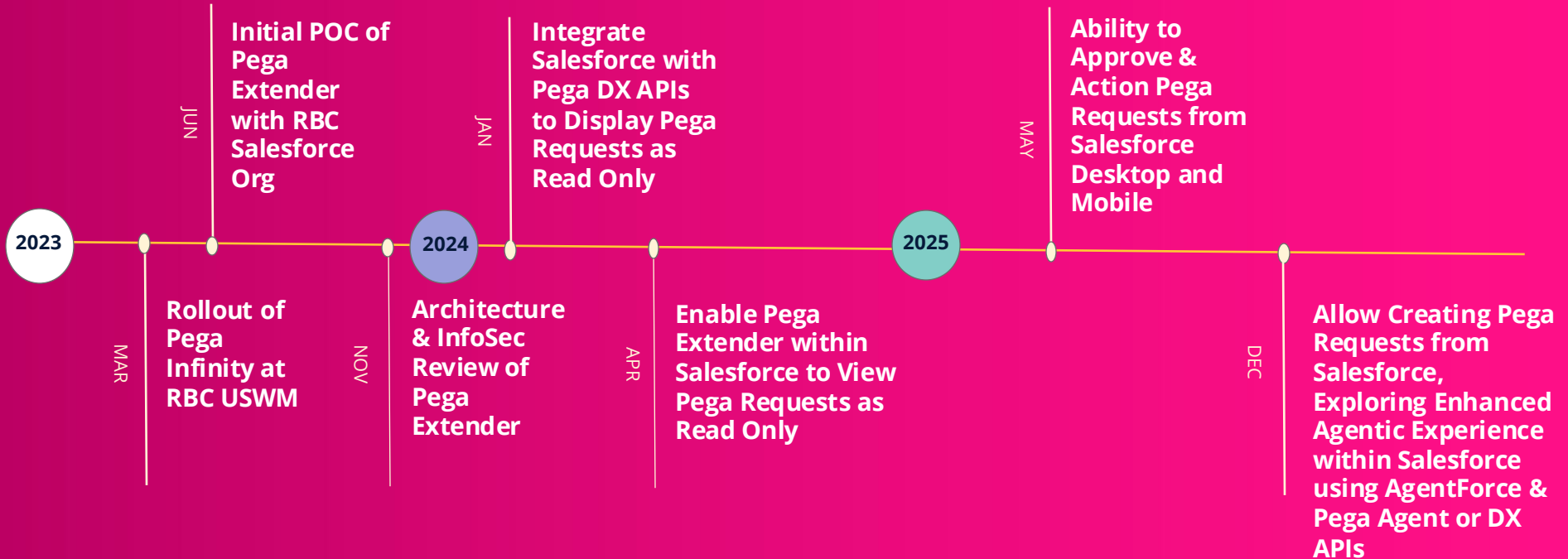
A bundle of web components that seamlessly integrates Pega capabilities directly into Salesforce to automate and orchestrate complex processes across all customer touchpoints & LOBs

## Outcome

This strategic integration marries Pega's case management finesse & Salesforce's record handling precision by invoking DX API services to retrieve and display data

# Timeline

From concept to production



**RBC Wealth Management Canada is embarking on a parallel journey.**

# High level benefits

- **Enhanced Front Office Experience**

- Elevates productivity on service requests with reduced clicks
- Faster execution for front, middle and back offices
- Integrated experience on Salesforce Mobile
- Contextual view at Financial Account, Client & Household levels

- **Technical & Operational**

- Improves performance with seamless UI & dynamic/real-time refresh
- Simplifies development & ongoing maintenance
- Faster time to market and lower development costs for process & regulatory changes
- Automatic authentication and single-sign-on make using Pega within Salesforce fast and easy



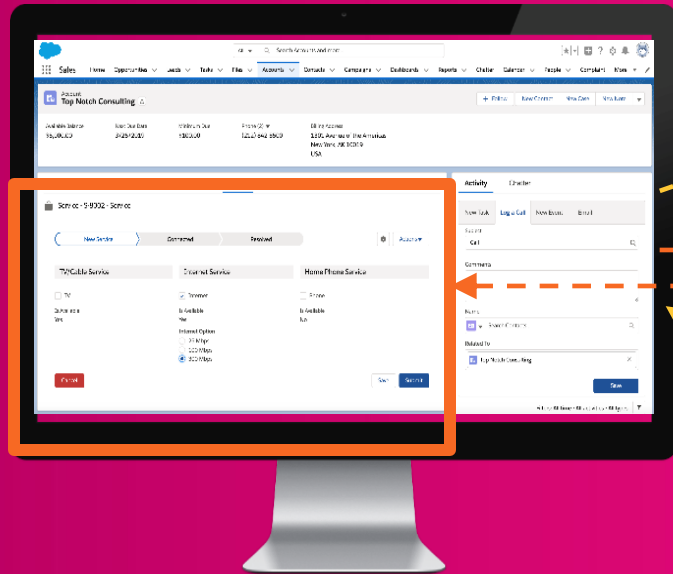
## Realized Benefits

- 1,350 hrs./mo. time liberation
- \$250K cost avoidance
- \$2.4MM cost avoidance annually



# Pega Process Extender for Salesforce Lightning

- *Infuse Pega's best-in-class case management into your existing interface*



Advisor Desktop

Authorization  
Initiated

DX API  
Triggers

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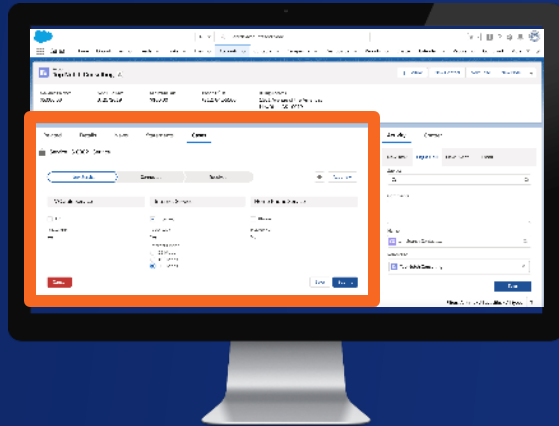


Authorization  
Completed





# DX API Requests are tailored to retrieve specific categories of data including...



Advisor Desktop

Related Cases Information

Past

Details on Pending Cases

Past

Details on Workbasket Cases

Current

Available Actions on Assignment

Current

Perform Action

Current

Attachment API – Retrieve and download

Current

Case Creation Data

Future

Case Flow

Future

Next Work Retrieval

Future

Case Search Results

Future





# Key lessons learned

1

## **Device Agnostic Design**

Ensure the design works seamlessly across various devices, screen sizes, and platforms.

2

## **Understand Action Capabilities**

Developers must check actions compatibility; not all actions work with DX API.

3

## **Integration Pattern Alignment**

Identify and align integration patterns through the organization's enterprise API gateway.

4

## **Cross-Device Testing**

Conduct end-to-end testing across devices and platforms, not in isolated environments.

5

## **Attachment Rendering Design**

Design UI components to render attachments properly using DX API capabilities.

6

## **Follow Feature Map**

Design solutions aligned with Pega's feature map to ensure platform compatibility.



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