



PegaWorld

JUNE 7-9 | LAS VEGAS

Sun Life Delivers Instant Answers

Empowering Agents with Pega GenAI Knowledge Buddy
Faster Knowledge Retrieval | Higher Accuracy



Sun Life Financial – little about us!



Global Financial Services Leader

Sun Life operates in over 25 countries with 70,000 employees, trusted by millions worldwide for financial security.

Commitment to Customer Service

Over 150 years of honoring commitments to customers, partners, shareholders, and communities.

Purpose-Driven Innovation

Our purpose: help clients achieve lifetime financial security and live healthier lives.

Philosophy of Transformation

We continuously bring innovative, insightful, and simple solutions so customers can trust us as their financial partner.

The Challenge: Why knowledge delivery had to change

Agents struggled with fragmented systems, creating measurable business impact



Inefficient Knowledge Articles

Articles were lengthy and dense, designed for completeness rather than quick use during live customer interactions, slowing agent response times.



Impact on Agent Morale and Scalability

Knowledge loss from attrition and lack of easy knowledge access lowered agent morale and limited scalable growth opportunities.



Reliance on Informal Knowledge

Agents depended on personal experience – book marking articles or colleague guidance, leading to inconsistency and inaccuracies across the organization.



Fragmented Information Sources

Agents accessed critical information through swivel chair to Knowledge Management Help Sites.



Increased Operational Costs

Escalations to higher-level support increased cycle times and diverted specialized resources from critical tasks.



Inconsistent Customer Experiences

Fragmented knowledge caused low agent confidence in information, causing customer impact, and risks.

BUSINESS IMPACT

↑ Handle Time

Longer calls requiring more agents

↑ Escalations

Higher-level support overloaded

↓ Agent Morale

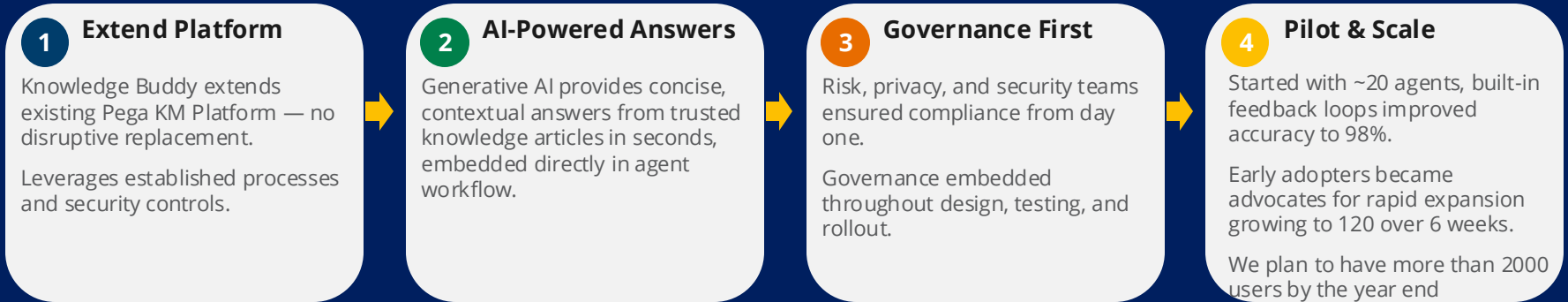
Frustration and attrition

↓ First-Contact Resolution

Repeat calls and customer churn

The solution: Pega GenAI Knowledge Buddy

How we improved speed and accuracy without increasing risk



CROSS-FUNCTIONAL COLLABORATION

Operations

Addressed real user needs and validated workflows

Risk & Governance

Embedded controls throughout design, testing, and rollout

Technology

Rapid implementation with Pega platform

Security & Privacy

Ensured regulatory compliance from day one

KEY LESSON

Governance took longer than technology. Early and proactive engagement with risk and security teams is critical to accelerating delivery.

KEY LESSON

Change Management is critical. While agents using Knowledge Buddy see strong value, many continue to rely on existing habits. Setting clearer expectations upfront would drive broader adoption and unlock greater impact faster.

Key learnings and takeaways

KEY TAKEAWAYS

- Iterate through introducing AI in existing workflows for seamless adoption
- Start with focused pilots to build confidence and evidence
- Maintain strong governance for trust and regulatory clarity
- Understand Article complexity/quality and work on improving the actual content
- Change Management – don't underestimate users trust issues in responses and educations on how to ask questions
- Understand and develop AI Governance model for future changes to models
- Engage risk and security teams early to accelerate delivery
- Establish guided principles for single vs multiple questions when considering accuracy and speed outcomes

Where are we focused next?

Contextual, Proactive and Agentic

- In-flow answers: Keep Buddy embedded in the agent's workflow to reduce tool switching and drive consistent use.
- Extend Email Bot solution to pre-populate contextual responses
- Conversation-aware knowledge surfacing: Use conversational/voice signals to surface the right Buddy guidance when it is needed.
- Context-aware knowledge assist: Keep a follow-up conversation thread with Buddy, not just one-time Q&A.
- Low-disruption scale across apps: Deploy the Buddy gadget within Pega applications.
- Expand content sources: Add sources beyond our Knowledge Management System.



PegaWorld

JUNE 7-9 | LAS VEGAS

PEGAWORLD.COM