



PegaWorld*iN*spire

Turbocharge Your Workflows with Process Mining and Process AI

Peter Bessman and Brian Kelleher
Pega

Pega's approach to AI

Embedding AI within your entire organization

Pega weaves AI across all offerings

Industry solutions

Business solutions

Pega Process AI

1:1 Customer Engagement

Why AI? **Empathic** engagement **optimizing experience** and **value**

Intelligent Automation

Why AI? Don't just automate work, **optimize business and customer outcomes** with augmented process intelligence.

Customer Service

Why AI? Make customer service more **proactive** by **anticipating customer needs** and service **outcomes**

Cross-offering technology platform AI capabilities

Decisioning

Predictive analytics

Event processing

NLP

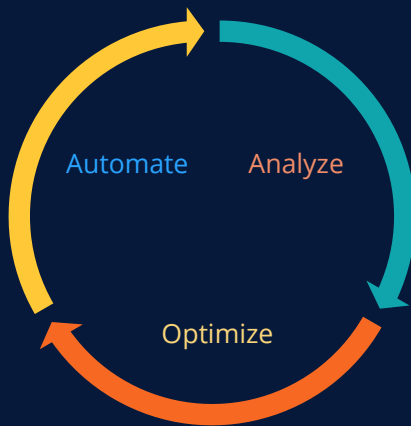
Business rules

Voice & Speech-to-text



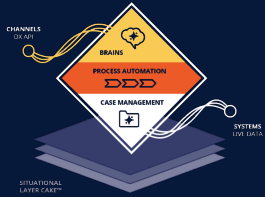
Continuous improvement

The three phases



Continuous improvement

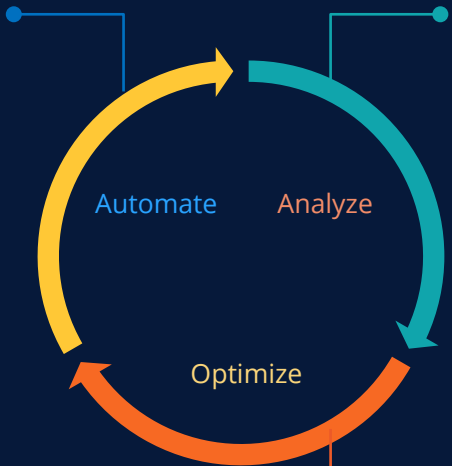
Powered by Pega



Pega App Studio

Rapid, Center-out™ configuration of process automation applications.

Low-code workflow
Digital experiences
Chat & email bots
RPA



Process & Task Mining

Real-time, AI-driven process discovery and analysis.

Task mining
Process optimization
Process analysis
Process monitoring



Pega Process AI

Always on, real-time self-optimizing workflows and decisions

Predictive learning
Decision Management
Natural Language Processing
Event stream triage



App studio

Automating insurance processing

PEGA Insurance Application

+ New

New: Insurance App

Dashboard
My Work
Pulse
Spaces
Documents
My Teams
Reports
Tags
Following

Personal details of claimant

Customer ID * C-1001

Claim type * Auto claim

TPA ID UHID123456

Policy number * P-223344

Sum insured \$5,000.00

Name * John Paul

Phone number * 9900999000

Address * 979 Rockville St. Indiana, PA 15701

Claim history

Number of past claims 4

No-claim bonus 9

Details of vehicle insured

Registration number * ADMX-123

Chassis number * SA111523663855666N

Engine number * EN0005553361225

Vehicle model * Honda CR-V

Cancel Save Submit

Recents

Insurance App
I-12231

Insurance App
I-12230

App studio

Automating insurance processing

The screenshot displays the Pega App Studio interface for an 'Insurance Application'. The main workspace shows a workflow titled 'Case life cycle' with a view of 'Steps, Personas, Data, Releases (All)'. The workflow is organized into three main stages:

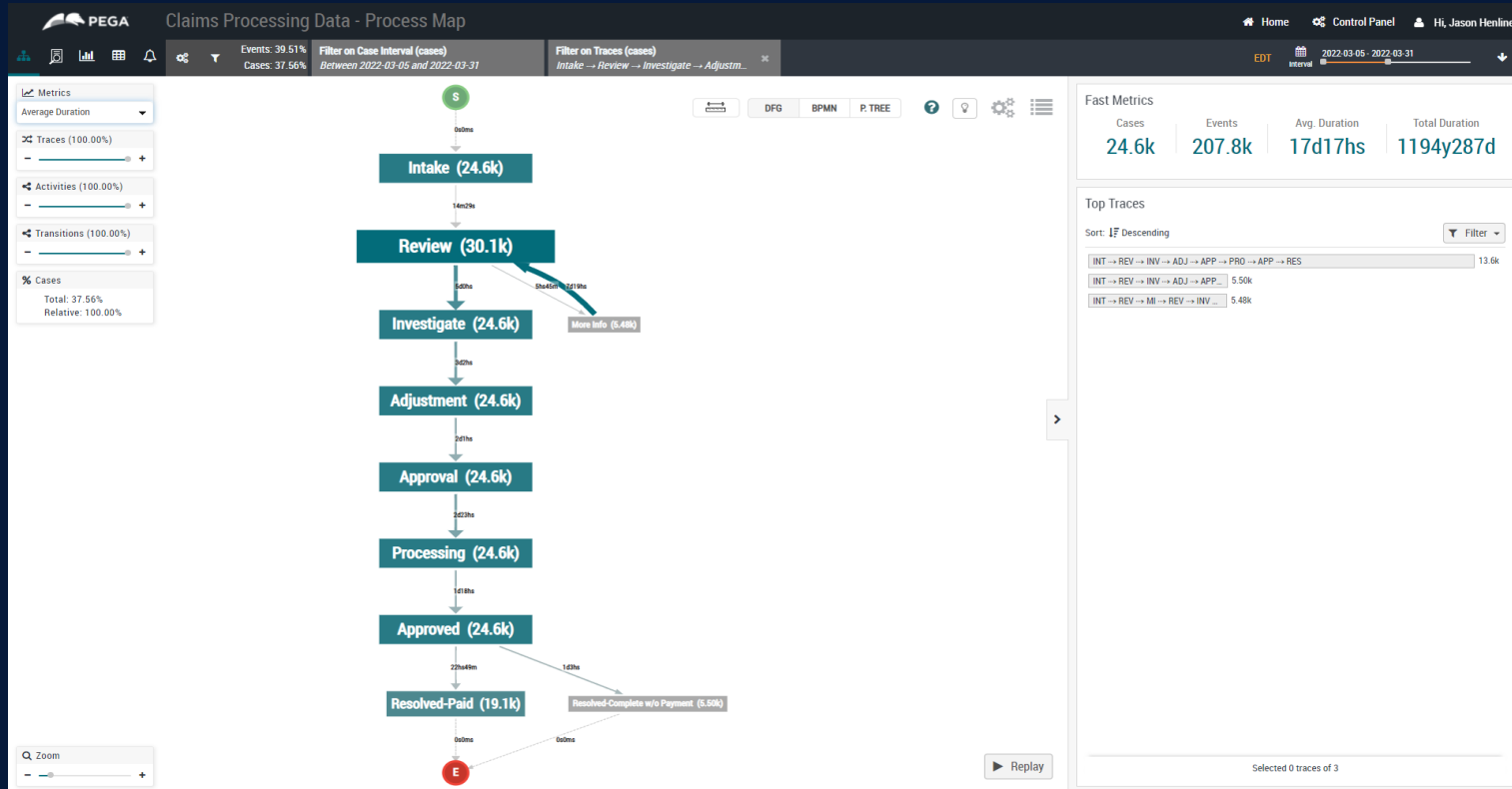
- Claims Collection:** Contains a step 'Claim Information' with a sub-step 'Collect claim information' and a '+ STEP' button.
- Claims Processing:** Contains a step 'Claims Processing' with sub-steps 'Risk evaluation', 'Low risk claim', and 'High risk claim'. The 'High risk claim' step is currently selected. A 'CONFIGURE PROCESS' button is located below these steps.
- Claims Disbursement:** Contains a step 'Claims Disbursement' with a sub-step 'Claims disbursement' and a '+ STEP' button.

Below the main stages, there are sections for 'Personas & Channels' and 'Data & Interfaces', each with three '+ PERSONA' and '+ DATA' buttons respectively. At the bottom, there is an 'Alternate Stage' section with a 'Claims Rejected' step containing a 'Claims rejected' sub-step and a '+ STEP' button.

The interface includes a top navigation bar with 'APP STUDIO', 'Application: Insurance Application', and buttons for 'Preview', 'Actions', 'Save and run', and 'Save'. A left sidebar contains navigation icons for Overview, Case types, Data, Channels, Users, and Settings. The top right corner shows the 'DEVELOPMENT' environment.

Process mining

Identifying the bottlenecks



Process mining

Drill in to understand the impact

PEGA Claims Processing Data - Analyses

Home Control Panel Hi, Jason Henline

Events: 39 51% Filter on Case Interval (cases) Filter on Traces (cases)

Cases: 37.56% Between 2022-03-05 and 2022-03-31 Intake -> Review -> Investigate -> Adjustm...

2022-03-05 - 2022-03-31

Slow Transitions

Slow transition from **Review** to **Investigate** affects 24608 events, and takes on average 5d0hs, adding to 337y300d

Affected Cases

100%
24.6k / 24.6k
100% of total cases

Average Case Duration

Category	Average Case Duration
Affected	17d17hs
Non-affected	0s0ms

Avg. duration: affected cases vs. non-affected cases

- Show in graph
- Show cases
- Go to transition analysis
- Dismiss

Slow transition from **Investigate** to **Adjustment** affects 24608 events, and takes on average 3d2hs, adding to 209y129d

Slow transition from **Approval** to **Processing** affects 24608 events, and takes on average 2d23hs, adding to 199y307d

Slow transition from **Adjustment** to **Approval** affects 24608 events, and takes on average 2d1hs, adding to 138y315d

Slow transition from **Processing** to **Approved** affects 24608 events, and takes on average 1d18hs, adding to 120y79d

Process AI

Creating a prediction

The screenshot displays the Pega Prediction Studio interface for an 'Insurance Application'. The main window shows a workflow with four steps: 'Select data', 'Prediction configuration', 'Select predictors', and 'Review prediction'. The 'Select predictors' step is currently active. Below the workflow, a dialog box titled 'Which fields should be used as predictor?' is open. It features a search bar and a table of fields with checkboxes for selection. Five fields are selected: CustomerID, PolicyNo, Risk, RiskProbability, and Active Channel. To the right of the table, there is instructional text: 'Select the fields that may be used as inputs for the prediction. Make a wide selection, exclude fields that are not allowed as predictors.' A 'Next' button is located at the bottom right of the dialog. The interface also includes a top navigation bar with 'PREDICTION STUDIO', 'Application: Insurance Application', a search bar, and a 'DEVELOPMENT' mode indicator. A left sidebar contains navigation icons for Predictions, Models, Data, and Settings. A 'Back to Pega App Studio' button is visible at the bottom left of the dialog.

PREDICTION STUDIO Application: Insurance Application Search DEVELOPMENT

Prediction: Claim Success Actions

Select data Prediction configuration **Select predictors** Review prediction

Which fields should be used as predictor?

Search Selected 5 of 16 predictors

<input type="checkbox"/> Field	Field type	Predictor type	
<input checked="" type="checkbox"/> CustomerID	Text	Categorical	✎
<input checked="" type="checkbox"/> PolicyNo	Text	Categorical	✎
<input checked="" type="checkbox"/> Risk	Text	Categorical	✎
<input checked="" type="checkbox"/> RiskProbability	Double	Numeric	✎
<input type="checkbox"/> Active Channel	Text	Categorical	✎
<input type="checkbox"/> Commit DateTime	Date Time	Categorical	✎
<input type="checkbox"/> Create Date/Time	Date Time	Categorical	✎
<input type="checkbox"/> Create Operator Name	Text	Categorical	✎
<input type="checkbox"/> Native Social Channel	Text	Categorical	✎
<input type="checkbox"/> Save DateTime	Date Time	Categorical	✎

Select the fields that may be used as inputs for the prediction.
Make a wide selection, exclude fields that are not allowed as predictors.

Back to Pega App Studio Next

Process AI

Adding a prediction to a case

The screenshot displays the Pega App Studio interface for configuring an 'Insurance Application'. The left sidebar contains navigation options: Overview, Case types, Data, Channels, Users, and Settings. The main content area is divided into sections: General, Attachment categories, Auditing, Collaboration, Data initialization, Goal & deadline, Locking, Notifications, Participants, Predictions, Related case types, Search and reporting, and Validation. The 'Predictions' section is active, showing a table with columns for Prediction, Objective, and Data object. A '+ Add prediction' button is visible, and a search dropdown is open, displaying 'Claim Success' as a result.

APP STUDIO Application : Insurance Application Preview DEVELOPMENT

Case type: Insurance App Actions Save and run Save

Overview Workflow Data model Views Settings

General Properties with basic configuration

Attachment categories Categories and security for attachments

Auditing Field level auditing

Collaboration Configure collaboration settings

Data initialization Data initialization when a case is created

Goal & deadline Suggested and required resolution times

Locking Strategy for managing concurrent access to this case and all child cases

Notifications Email and push notifications

Participants Case participants and associated roles

Predictions Manage predictions and associated objectives

Related case types Case types related to this case type

Search and reporting Indexing for search and reporting

Validation Criteria for case updates

Predictions Manage predictions and associated objectives

Prediction	Objective	Data object
No items		

+ Add prediction

Search...

< Insurance App

Claim Success

Process AI

Using AI to self-optimize a decision

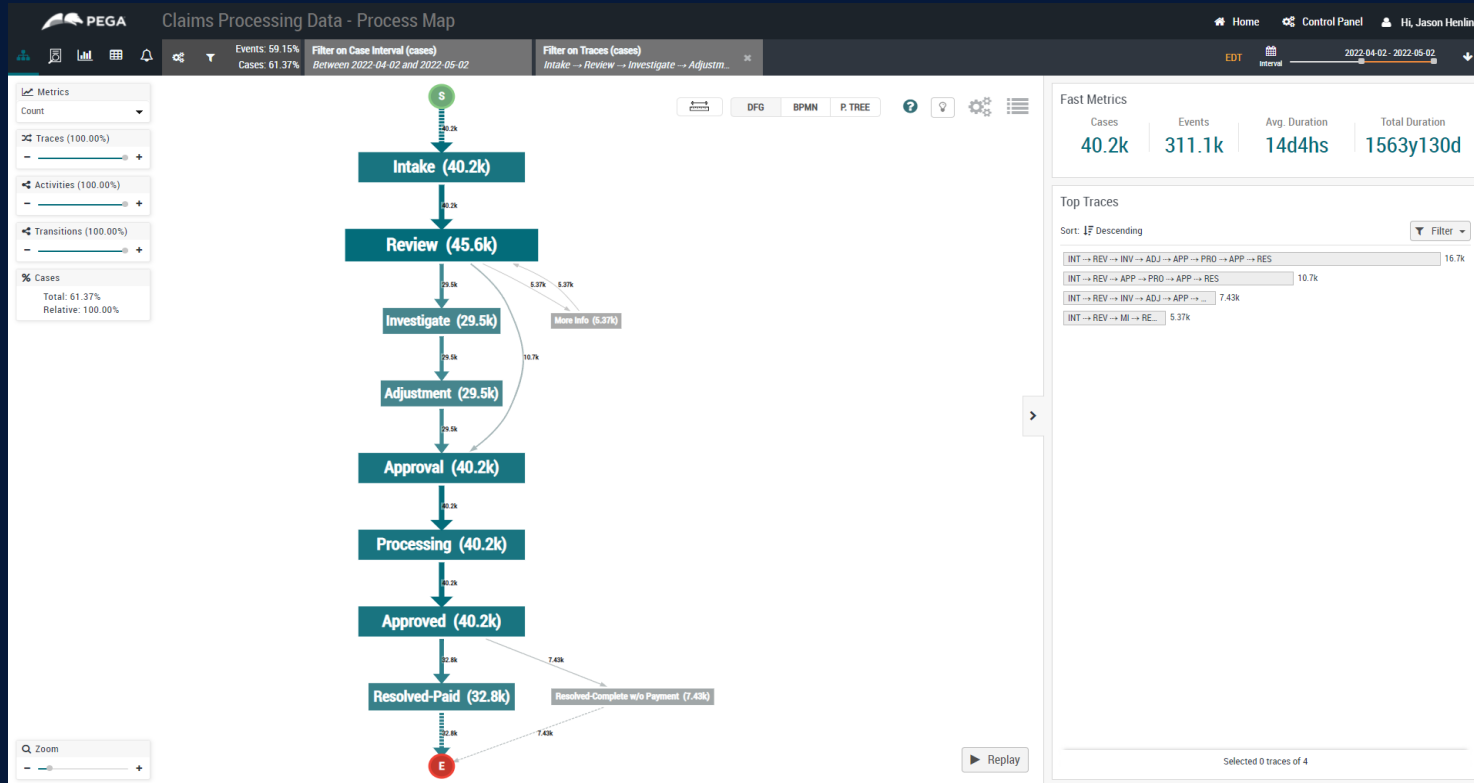
The screenshot displays the Pega Studio interface for configuring a workflow. The main window shows a workflow titled "Case life cycle" with three stages: "Claims Collection", "Claims Processing", and "Claims Disbursement". The "Claims Processing" stage is currently selected, and a "Configure condition" dialog box is open over it. The dialog box allows setting conditions for a step, with the following configuration:

- Condition 1: ClaimedAmount is less than or equal to 100
- Operator: and
- Condition 2: Probability is greater than or equal to 0.95

The dialog box includes a "Submit" button and a "Cancel" button. The background interface shows various navigation options like "Overview", "Case types", "Data", "Channels", "Users", and "Settings". The top bar indicates the application is "Insurance Application" and the current view is "Development".

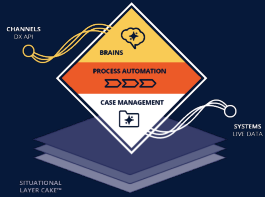
Process mining

Identifying the improvement



Continuous improvement

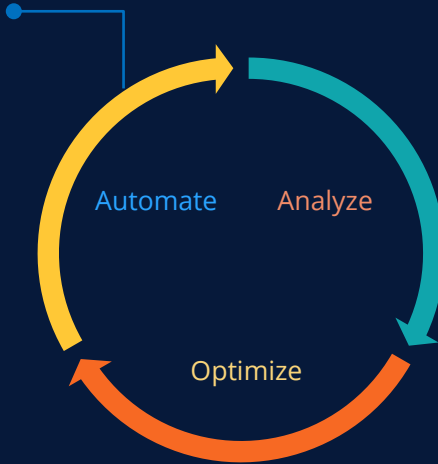
Powered by Pega



Pega App Studio

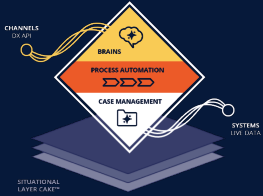
Rapid, Center-out™ configuration of process automation applications.

Low-code workflow
Digital experiences
Chat & email bots
RPA



Continuous improvement

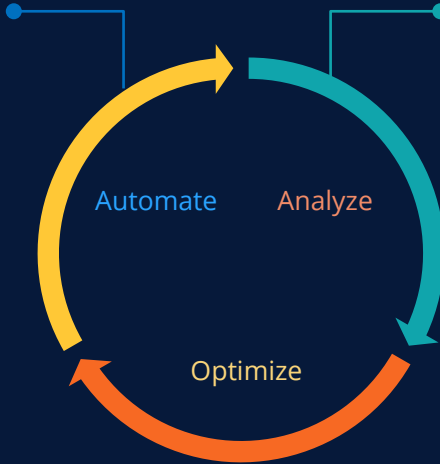
Powered by Pega



Pega App Studio

Rapid, Center-out™ configuration of process automation applications.

Low-code workflow
Digital experiences
Chat & email bots
RPA



Process & Task Mining

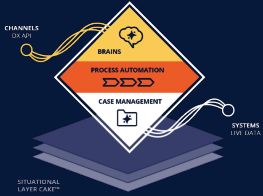
Real-time, AI-driven process discovery and analysis.

Task mining
Process optimization
Process analysis
Process monitoring



Continuous improvement

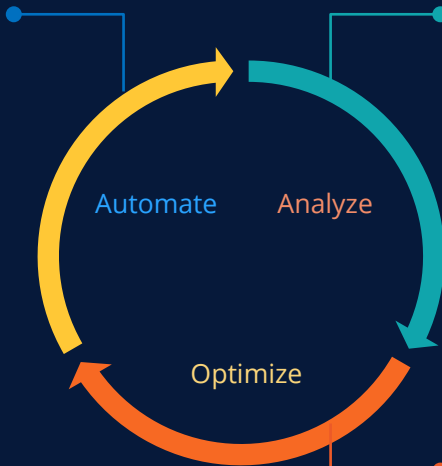
Powered by Pega



Pega App Studio

Rapid, Center-out™ configuration of process automation applications.

Low-code workflow
Digital experiences
Chat & email bots
RPA



Process & Task Mining

Real-time, AI-driven process discovery and analysis.

Task mining
Process optimization
Process analysis
Process monitoring



Pega Process AI

Always on, real-time self-optimizing workflows and decisions

Predictive learning
Decision Management
Natural Language Processing
Event stream triage



Want to learn more?

Check out

Intelligent Automation iInnovation Hub

Visit

<https://www.pega.com/technology/process-ai>





PEGA

PegaWorld*iN*spire