



# PegaWorld

JUNE 7-9 | LAS VEGAS

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# Swivel-Chair to Single Pane: Blue Shield of California reimagines Customer Service with Pega

Learn how Blue Shield of California is transforming the agent experience by consolidating fragmented systems into a single Pega-powered service desktop.



# About Us



## **Sonya Wade**

*Sr. Manager, Product Management –  
Platform Strategy & Operations*



## **Shawna Maitia**

*Product Manager, Principal –  
Platform Strategy & Operations*

# BSC background

## Blue Shield of California

- Independent member of the *Blue Cross Blue Shield Association*
- Nonprofit health plan *founded in 1939*, headquartered in Oakland, CA
- *Serving 4.8 million members* across California
- Committed to *digital transformation, innovation, and member-centric care*
- Key technology partners: *Pega, Genesys, Salesforce, AWS*



***Mission: Ensure all Californians have access to high-quality healthcare at an affordable price***

# We'll Share

- Design patterns
- Roadmap decisions
- Successes
- Lessons learned



# The Reality of Modern Customer Service

The Agent Experience IS the Member Experience

- Agents don't fail - systems fail them
- Fragmented tools slow resolution and increase compliance risk
- Member expectations are rising - they want fast, accurate, personalized service across every channel
- Regulatory and compliance pressure continues to intensify



# The Problems We Faced

Too Many Systems. Not Enough Confidence

- **20+ backend systems** touched during a single member interaction
- **Multiple logins, screens, and data sources** creating inconsistency
- **Manual navigation** led to:
  - Longer average handle times (AHT)
  - Inconsistent answers to the same member question
  - Increased compliance and audit risk
  - Agent fatigue and burnout
- **No single source of truth** for the member's full context
- New agent **training took weeks** due to system complexity



# Our Vision



## One Screen. One Dream.

- **Single system of engagement** - one desktop where agents can handle any member interaction
- **Unified member context** - all relevant data surfaced in real time
- **Embedded knowledge + guided workflows** - agents guided step-by-step through complex service requests
- **AI-ready foundation** - built for the future before GenAI arrived, with clean data, decision points, and extensible architecture
- **Reduced cognitive load** - let agents focus on the conversation, not the navigation

# Why Pega

Pega as the System of Engagement

## Why we chose Pega:

- **Orchestration layer** - connecting all systems through a single desktop
- **Systems of record** stay intact - we didn't rip and replace; we unified
- **Incremental modernization** - no big-bang rewrite risk
- **Purpose-built** for complex healthcare workflows

## Competitive differentiators:

- Easier **UI customization** than alternatives we evaluated
- **Superior real-time data** synchronization across backend systems
- **Healthcare-specific accelerators** out of the box



"What really separates Pega is their ability to deliver and seamlessly integrate with multiple systems."

# Architecture at a glance

Unified Without Disruption

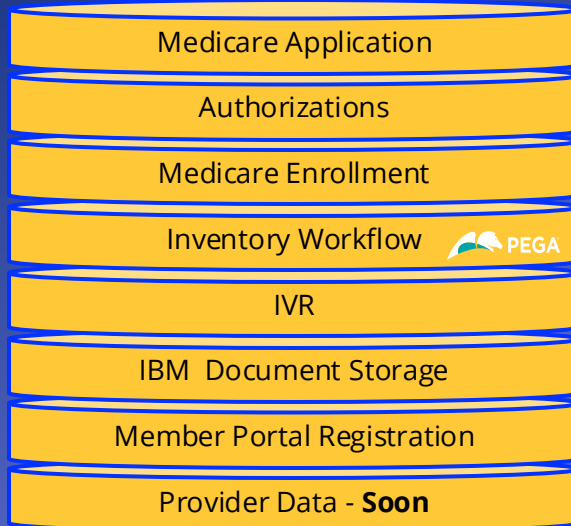
**Pega Customer Service sits at the center as the single agent desktop**

- Real-time integrations to:
  - Eligibility systems
  - Claims processing
  - Billing & Payment
  - Provider data & network information
  - Authorization & Referral systems
  - Knowledge management
- Real-time context assembly — **member's full picture in seconds**
- **API-driven integration** layer ensures systems of record stay intact
- **Single view** addresses majority of inbound call volume types

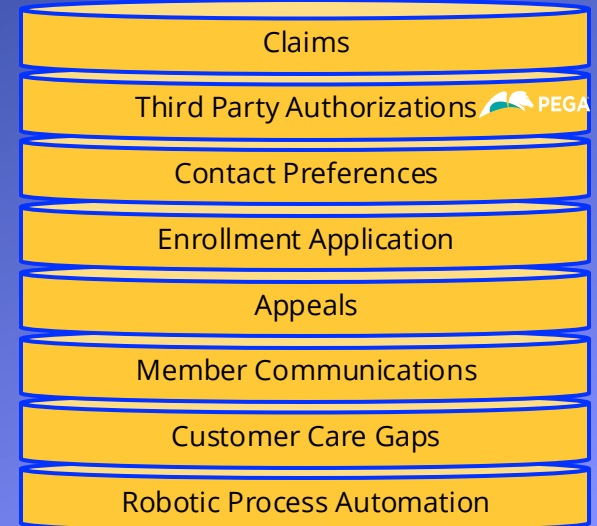


# Architecture at a glance

## Data Pull



## Data Push/Pull



# What Changed for Agents

## From Swivel-Chair to Flow

### Before :

- Multiple logins
- Manual data lookup across 20+ systems
- Dozens of clicks per interaction
- Guesswork and inconsistency
- Long ramp-up for new agents
- Reactive problem-solving

### After:

- Single sign-on, single desktop
- Data surfaced automatically
- Guided workflows, fewer steps
- Real-time data, confident answers
- Faster onboarding, embedded guidance
- Proactive next-best-action suggestions

*"I finally feel like the system is working WITH me, not against me."*



# Anticipated Outcomes



## Measurable, Meaningful Impact

### Key measured successes:

- **Reduced** Average Handle Time (AHT)
- **Fewer** Steps per Interaction
- **Improved** First Call Resolution (FCR)
- **Higher** Customer Satisfaction (CSAT)
- **Decreased** Agent Onboarding Time
- **Improved** Compliance Adherence

# Designing for AI (Before AI arrives)

## AI Starts with Good Foundations

We built the AI-ready foundation before implementing AI :

- Unified data access
- Embedded decision points
- Consistent user journeys
- Clean workflows

Why this matters:

- Organizations that bolt AI onto fragmented systems get fragmented results
- AI doesn't fix bad design - good design enables responsible, effective AI
- Our Pega foundation lets us activate AI capabilities incrementally



# AI, to be!

## AI as an Assistant, Not a Replacement

**Our AI roadmap - enhancing human agents, not replacing them:**

### **Knowledge Buddy** -

AI delivering articles and answers in real time

**Voice AI** - Real-time AI transcription, form fill, next-best-action advice, and call wrap-up

**Coach** - Real-time AI coaching and quality management plus post-interaction feedback

### **Customer Simulation** -

Realistic, impactful AI-generated training scenarios

## Our guiding principle:

*AI supports agents in real time — without taking control away from them*



# Lessons Learned & Best Practices

What We'd Tell Anyone Starting This Journey

1. Design for human agents first (change management adoption)
2. Modernize incrementally
3. Align business, IT, and compliance early
4. Invest in the foundation before the flashy features
5. Measure what matters

*Technology only succeeds when people trust it.*







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