PEGA VISUAL BUSINESS DIRECTOR

Understand the Business Impact of Every Customer Strategy

A PEGA DATASHEET

Take the Guesswork Out of Optimizing Customer Processes

Pega Visual Business Director offers real-time visibility and control over customer strategy, leveraging the power of Pega Decision Management and Business Process Management to rapidly model and execute an approach. Users will fully understand the likely impact of each decision before they make it – allowing them to adapt the customer experience, optimize productivity and revenue generation potential, and manage any associated risk.

Using a highly intuitive three-dimensional interface, you can view the performance of actual or proposed strategies at a detailed level across all channels, products or lines of business — and even down to the individual service representative. Once configured, you can deploy these optimized strategies at the touch of a button across any or all channels and then monitor performance in real time.

With Pega Visual Business Director, you can:

- Predict - and then control - the impact of customer offers and treatments on satisfaction, revenue, retention, profitability and other metrics.

- Ensure that new processes adhere to your operational constraints and service level agreements… before moving them into production.

- Monitor the execution of strategies in real-time, to confirm that interaction results align with expectations, targets and budgets.

- Adjust processes on-the-fly for immediate adaption to market pressures, customer expectations or operational needs.

CHALLENGE

Businesses invest tremendous time and resources developing strategies to improve customer interactions; securing the strategic alignment of sales, retention, cross-sell, up-sell, and service initiatives requires careful consideration and planning.

But understanding the real business impact of a new offer or treatment is often more art than science. Companies can only guess at the long-term profitability impacts from a new product, at the level of risk introduced by an offer, or at the effect on retention from a new service offering.

SOLUTION

With Pega Visual Business Director, companies gain deep insight into the potential impact of each business decision and an easy way to model, execute and modify customer strategies in order to maximize their value to the business.

BUILD FOR CHANGE®

Business Benefits

- **Measure Financial Impact –** simulate the impact of a new offer on financials over the next 12 months, then test changes to the eligibility criteria to determine potential spikes in costs.

- **Assess Customer Risk –** evaluate the impact of changing policies on volume, losses and revenue – then determine the impact on credit risk metrics, such as an increased retention.

- **Enhance Channel Efficacy –** experiment with different channels, and to visualize the implications on various customer segments.

- **Build Great Customer Experiences –** You'll visualize call center performance in real-time to track the impact on sales, retention and complaint resolution.

- **Drive Marketing Effectiveness –** Assess the effects of pricing adjustments on sales, revenue, profitability – so you can understand how marketing, sales and service combine to impact customer behavior and brand perception.

Key Capabilities

- The ability to forecast metrics (such as volume and costs) over a sustained period substantially improves your planning results.

- The 3D management console empowers business users to determine the likely impact of multi-channel, multi-issue, inbound, and outbound customer experience strategies - before moving them into production.

- Advanced decisioning technology simulates operations in minutes, and provides performance feedback in just seconds.

- The replay and fast forward of actual customer experience strategies makes it simple to understand the potential impacts to your business.

- Real-time monitoring provides immediate insights around productivity, revenue, profitability, customer satisfaction, and any other key metrics that are critical to your business.

- Easily configured layers of security, hierarchies and personalized views effectively control user access to simulation and deployment capabilities.
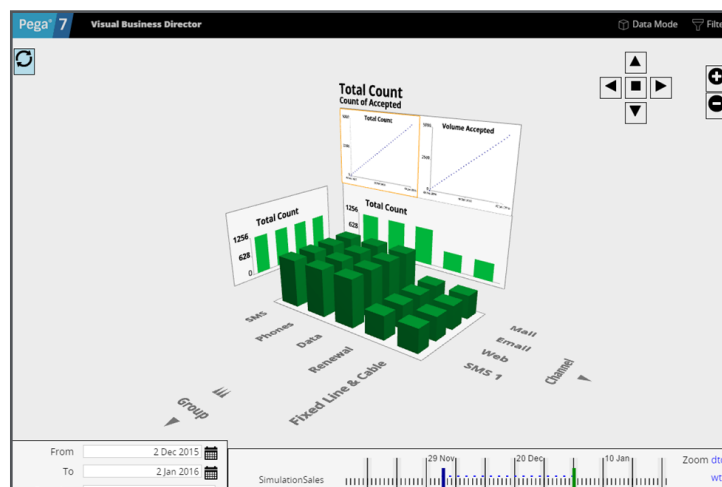
After simulating a business scenario, Visual Business Director enables you to graphically view its impact on service level agreements, revenues, volume, profitability targets, or any other desired benchmark.