



PegaWorldiNspire

The Secret to Service: Strategies for Successful Customer Service Transformation

Rahul Ashok

Sr Director, Business Excellence –
Customer Service

Michelle Lagna

Sr Director, FS and Insurance

Secret to transformation success ...

We all know

Change is hard



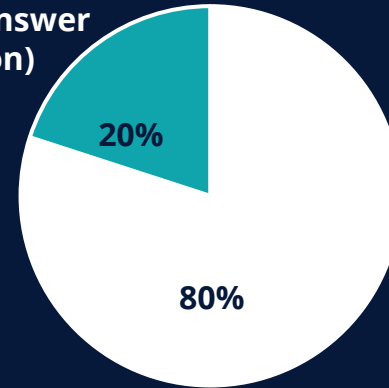
...of transformation programs fail to deliver on expected results, no matter whom you ask

The secret is that

Delivery matters

The key to successful transformations

Right answer
(solution)

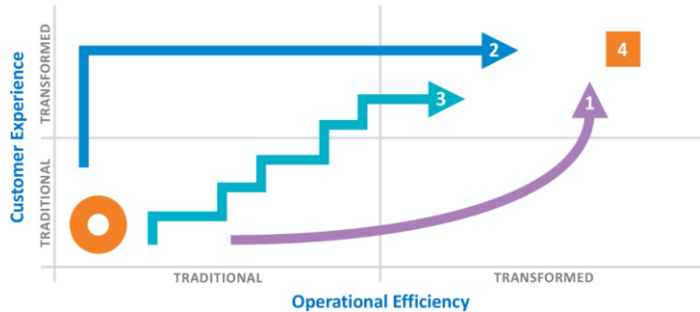


Right delivery
(outcomes, technology, capabilities)

Digital transformation pathways

A view from MIT's CISR research of 1000+ organizations

Choose Your Pathway to Future Ready



25%



18%



26%



7%

Choose a Pathway

Where are you today?

What is your digital disruption threat level?

1. Follow **Pathway 1** if your Customer Experience is ok and threat is not high.
2. Can't wait to improve your Customer Experience or facing the threat of new competitors? Follow **Pathway 2**.
3. Can't wait to improve customer experience but a few initiatives will make a big difference (e.g., a great app)? Start with those and then focus on operations and repeat in small steps on **Pathway 3**.
4. High threat and can't see a way to change the organization fast enough? Follow **Pathway 4**.

Copyright © Massachusetts Institute of Technology, 2022. This work was created by MIT's Sloan Center for Systems Research (CISR). From Nick van der Meulen and Stephanie L. Woerner, "The Four Pathways to Digital Business Transformation" (Pega Virtual Workshop, September 15, 2020), c isr.mit.edu.

Secrets of success

The 4 "Must Dos" for a successful transformation with Pega Customer Service

1. Customer First
2. Focus on Business Outcomes via strong Business/IT collaboration
3. Focus on Reuse
4. Governance



**Customer Journey
at the Center**



**Unified AI &
Automation**



**Transformation
without Disruption**

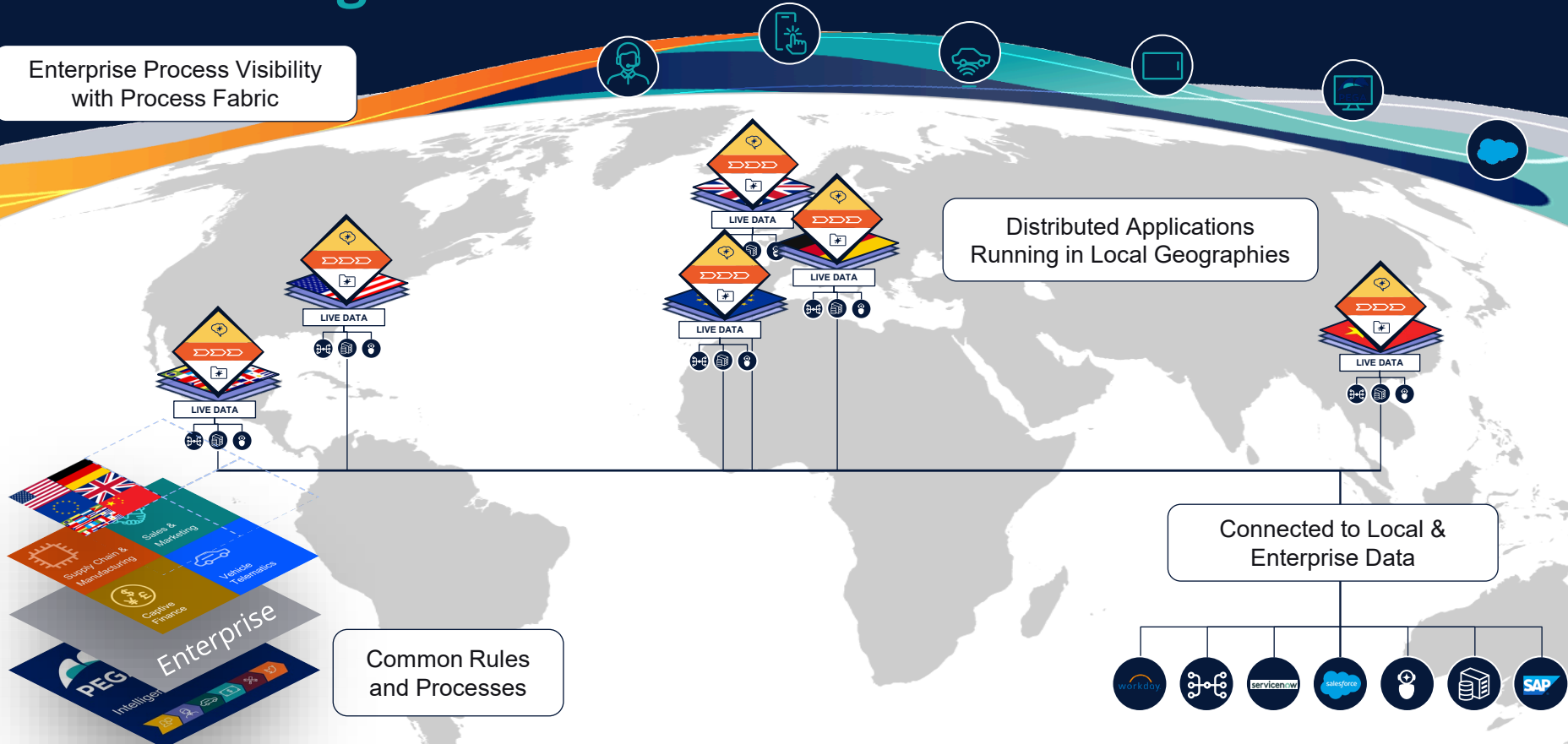
Customer first – business outcome focused

AI and decisioning, process automation and case management.
Focus on your outcomes and business logic.



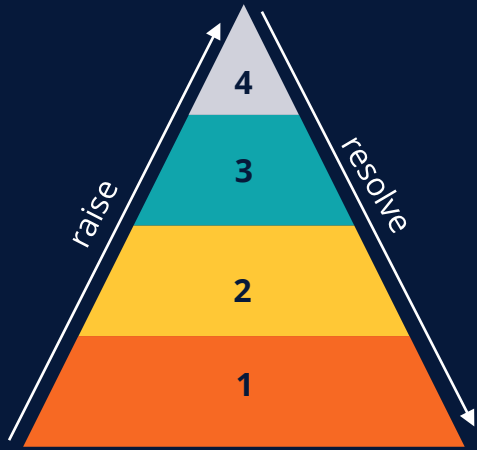
Accelerating time to value with reuse

Enterprise Process Visibility
with Process Fabric



Its about people – multi-level governance

Proactive. Transparent. Lean.



Executive

Quarterly review with executive sponsor(s) and program managers

Program

Monthly alignment across programs and stakeholders

Project

Biweekly collaboration across teams to sync on status and priorities

Team

Daily meeting to measure progress, address blockers, and mitigate risks

Executive Governance Overview

	Current	Prior	Back to green actions	Actions Needed				
				Request Date	Action	Due Date	Owner	
Overall	🟢	🟢						
Customer Success	🟢	🟢	Continue stakeholder dialog and tracking of each program metric					
Legal	🟢	🟢						
Schedule	🟢	🟢						
Budget	🟡	🟡	Working on budget split & team extensions					
Technical	🟢	🟢						
Resources	🟢	🟢						
Co-Production	🟢	🟢						
Path to business value	Improve AHT by 10% by pre-fill data, Voice AI, Next Best Action Reduce Mean Time to Resolution by 15% by intent led processes							
Guardrail score	Weighted score = 94		Compliant rules % = 88	Total number of rules = 7770				
Defects (3.2 Release)	Number open = 4		Number resolved = 42	Number of Blocker = 0				
Key Milestones				Key Risks & Mitigation Actions				
Key Milestones	Target Date	Completion Date	Status	Open Date	Risk	Action	Due Date	Owner
Application Release (3-1)	05/03/2022	05/03/2021	Complete					
Application Release (3-2)	05/17/2022		In Progress					
Application Release (3-3)	06/13/2022		In Progress					

Begin your Pega transformation journey today ...

- Read up more about [MIT CISR's research](#)
- See Pega Customer Service in Action on Pega.com:
 - Aflac – [Creating the “Workforce of the Future”](#)
 - Great American – [Making Annuities Simpler](#)
- Additional sessions at PegaWorld iNspire 2022:
 - Booking.com’s Keynote on customer service transformation with Pega
 - First Tech Federal Credit Union on their success with Pega
- If you’re interested in learning more, contact your Pega Sales team or reach out to Michelle or Rahul at:
 - Michelle: Michelle.Lagna@pega.com
 - Rahul: Rahul.Ashok@pega.com



PEGA

PegaWorld*i***N**spire