



# Supercharge your Salesforce capabilities with the power of Pega Case Management

Combine Salesforce and Pega to extend and reinforce your investment

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## Take your customer service to the next level

Regardless of how advanced you are in your digital transformation journey, connecting with all of your customers, partners, processes, and products isn't an easy task. Each effort that you've made is a valuable step toward driving optimal customer engagement. This is why your prior Salesforce customer service investments are so important for your enterprise.

But, as many enterprises have discovered, scaling across a wide array of mission critical processes, channels, and operations can demand an extra set of critical ingredients in today's challenging and rapidly evolving global environment. Your team requires increased process efficiency and a reduction of costs. Meanwhile, your customers continue to demand seamless experiences. To deliver the outcomes they expect, it's essential to reach new levels of intelligent, seamless front- and back-end processes that improve customer engagement and enterprise operations. This is where Pega comes in.

Pega can augment, extend, and reinforce your Salesforce deployment to help you provide even greater results while slashing costs. By supercharging Salesforce with Pega, you can deliver on the promise of truly connected customer engagement using end-to-end automation that reaches across all of your interactions, touchpoints, business lines, and clouds.

## Go beyond the ticket: Connect across silos with end-to-end automation

Many enterprises like yours use Pega to support and reinforce their existing Salesforce customer service investments. These organizations are able to get even more out of their current deployment by infusing Pega's best-in-class case management capabilities that scale across sophisticated, multi-dimensional operations and take all aspects of your business (multiple products, regions, channels, customers, business lines) into account. These capabilities connect across systems and silos to make even the most sophisticated processes simple, efficient, and effective.

## The challenges of one-dimensional case management

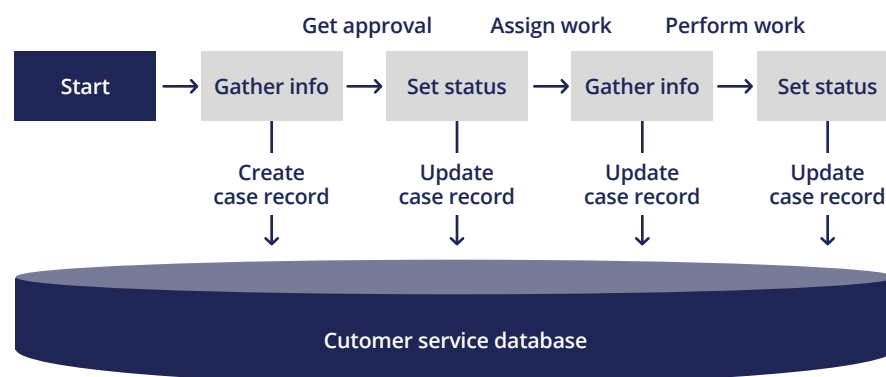
While Salesforce includes “case management” capabilities, Pega has a different definition and solution for the term. With Salesforce, a “case” refers to your service ticket – a mechanism for routing work across teams and functions. The Salesforce case is a flat, one-dimensional data object that is designed for tracking and displaying data. While this is important on its own, it’s missing full visibility across the entire case as well as the ability to seamlessly automate and execute the actual work (both human- and machine-based) that will drive the case to resolution.

Organizations that lack a complete case management solution typically experience many of the following challenges:

- Multiple employees across your organization are **delegated to complete manual work assignments**, rather than the work being automated.
- **Work is tracked manually** using point solutions, such as Microsoft Access, Microsoft Excel, or emails that result in slow and inefficient processes
- **Lengthy development backlogs of change requests** that require extensive IT resources and increase costs
- **Limited visibility** into where cases stand across channels, child cases, or beyond your Salesforce cloud
- **Disjointed agent experiences** that require toggling through multiple screens and applications

These challenges make it more costly to maintain your current solution, delay time to value, and eat away at your team’s productivity.

Illustration: Salesforce’s one-dimensional case management



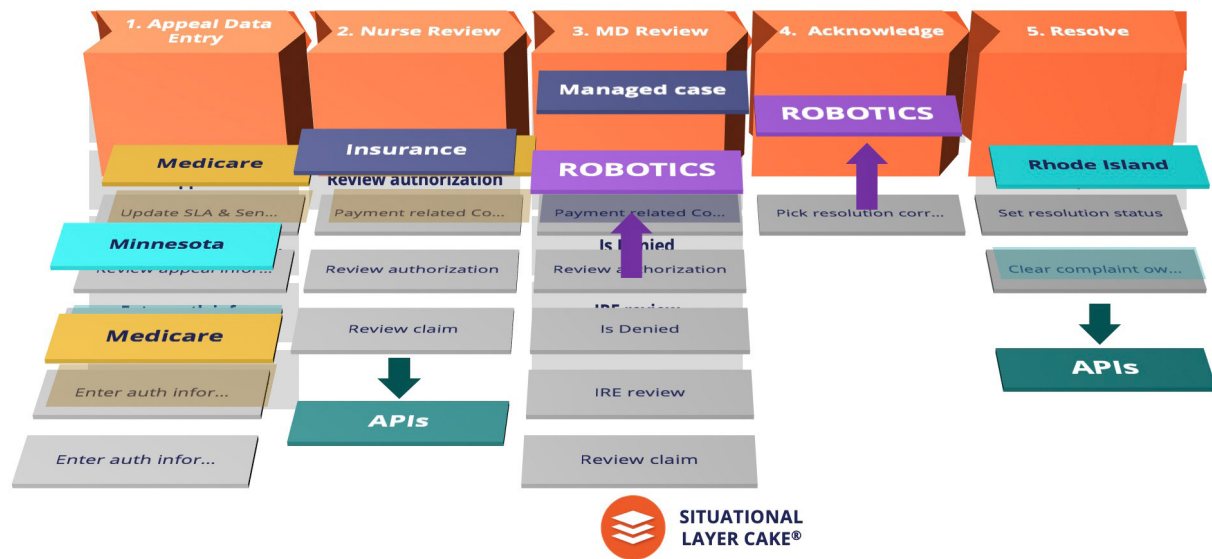
## The power of Pega's multi-dimensional case management

To remedy these challenges and increase operational efficiency while providing seamless experiences, it's important to automate far more than just the routing of the service issue. This means automating and executing the actual work within the case, regardless of how long or sophisticated the process is.

With Pega, a case isn't just the one-dimensional ticket that sends work through your organization; a case acts as the multi-dimensional framework of Pega's core architecture. It enables the orchestration and execution of work itself (with less manual work). It is capable of adjusting to the dimensions of your business, such as the regions you do business in, the products you sell, and the channels and types of customers you engage. Pega's multi-dimensional case management expands and adapts to customer and agent microjourneys across business dimensions and industries.

Rather than having to create duplicate, disconnected versions for each area of your business, Pega streamlines processes across the enterprise into a common model. Leveraging Pega's patented Situational Layer Cake™ architecture, which factors in the many dimensions of your complex organization, you can lay the groundwork with the common elements and customize for differences within each process. By extending your existing Salesforce deployment with Pega, you can facilitate, reuse, and rein in complexity as business processes and regulations change.

Illustration: Salesforce infused with Pega's multi-dimensional case management



Pega's multi-dimensional case management brings together robotics, intelligence, integration, and process automation, so you can turn labor-intensive, error-prone manual transactions into fast, frictionless experiences that deliver value quickly.

Additionally, Pega's cases offer complete end-to-end visibility in a 100% visual, low-code environment. No matter how many steps and participants are involved in the process, Pega manages the human tasks that need to get done – with automatic escalations and dynamic prioritization to ensure that the right people are working on the right things, regardless of where they live in your organization. Cases leverage powerful business rules and intelligence to automate approvals, decisions, and routing to drive the work to a fast and easy completion – without the heavy lift of extensive IT resources.

## Move from a channel-led to a channel-less approach

Pega case management logically separates your system logic – where and how you get and update your data – from the business logic (UI) – how you get the work done. This allows you to wrap around existing legacy complexity to create simple experiences for both your employees and your self-service customers.

With this separated logic, the paradigm of omni-channel service is shifted from a “channel-led” to a “channel-less” approach. To create consistent experiences across channels, you must maintain the state and context of every customer conversation – including those outside of Salesforce interactions. Pega's industry-leading case management gives you this ability. Each case stores the customer context and carries it across channels. Whether connecting via interactive voice response (IVR), web self-service, chatbot, mobile, email or the call center, customers and agents are able to pick up a case or interaction at the exact place where they left off.

The channel, becomes irrelevant, enabling faster time to resolution. You can simply activate your outcome-driven processes to focus on the customer's journey on any channel, without duplication.

Pega upgrades your current case management with greater capabilities that:

- Invoke a channel-less approach by **extending cases to any touch point**, including self-service, IVR, and mobile, so your customers and agents can reach resolution faster
- **Automate work** from end to end with seamless “lights out” robotic automation (RDA/RPA) to connect into any legacy system
- **Provide complete real-time visibility** into your cases and child cases
- **Eliminate coding** for screen configuration and REST calls that improve process efficiency

### Success story

A large North American contact center outsourcing company employs thousands of agents and serves more than 18 million contacts. In the past, agents were required to use many different service screens, including Salesforce. By implementing Pega, all information appears on a single screen, regardless of the channel of interaction. Now, processes that once took up to three minutes are automated and executed in under 30 seconds, empowering agents to focus on what matters most: their customers.

## Start working faster and smarter – like these global innovators

Pega has helped the world's leading enterprises eliminate service inefficiencies using end-to-end case management and intelligent automation. Because Pega cases are automatically created at each touchpoint along the customer journey, it's easy to understand and maintain individual goals across every interaction and channel.

For example, a leading healthcare company was struggling to streamline service processes for complex patient cases. Nurse practitioners who handled calls involving challenging, high-risk patient scenarios were unable to access all of the data they needed to resolve interactions using Salesforce alone. This led to complicated, manual, and inconsistent processes. After supplementing Salesforce with Pega, a case that maintains a patient's goal across interactions is automatically created. Nurses and agents now know what actions patients have taken, regardless of where they take place, making it easy to know what's done and what remains to be done. With Pega, nurses and service agents are required to perform significantly less manual work so patients get results faster.

Another global innovator, a large technology company, was stuck with no practical way to effectively integrate their legacy CRM system with Salesforce. Using Pega as the orchestration engine, what would have been a two-year implementation project was delivered in only a few months. Now, Pega serves as the glue around their universal customer master, ensuring work inside and outside of Salesforce corresponds to the customer journey, no matter the context.

### Success story

**"The system not only allows us to offer a great customer experience, but we're doing it fast, we're doing it in real time, and we're doing it without errors."**

– CIO, Large insurance company

## Deploy directly within your Salesforce Lightning environment

Pega makes integration with your existing Salesforce investments and non-Salesforce infrastructure easy. With Pega Process Extender for Salesforce Lightning (available as a free download from the Pega Marketplace™), you can quickly integrate Pega capabilities with your existing Salesforce deployment to start driving better customer experiences.

Pega Process Extender for Salesforce works by providing both front-end and API-level integration to Salesforce orgs. This enables Salesforce applications to:

- **Create** Pega cases to manage and automate work from end-to-end.
- **Invoke** Pega robotics to drive desktop automation.
- **Display** the Pega designed case using your current Salesforce interface.

The solution leverages Pega's DX API to directly update cases in the Pega platform in real time – without the need for third-party integration software.

The result: You can interact with Pega cases – and be guided through complex processes – without ever leaving your existing Salesforce environment. This translates to getting work done faster and simplifying your customer and agent experiences.

### Salesforce infused with Pega with complaint case example

The screenshot displays a Salesforce Lightning interface for a Pega Case. The top navigation bar includes 'Sales', 'Home', 'Chatter', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Groups', 'Calendar', and 'More'. The account details for 'Susan Smith' are visible, including 'Type: Customer - Direct', 'Phone: (312) 999-4422', 'Account Owner: User User', and 'Industry: Banking'. The Pega Case section shows a progress bar with 'New Service', 'Connected', and 'Resolved' stages. Below this, there are three service categories: 'TV/Cable Service', 'Internet Service', and 'Home Phone Service'. The 'Internet Service' section is active, showing 'Is Available: Yes' and 'Internet Option' with radio buttons for '25 Mbps', '100 Mbps' (selected), and '300 Mbps'. The 'Home Phone Service' section shows 'Is Available: No'. The right sidebar contains the 'Activity' panel with options for 'New Task', 'New Event', 'Log a Call', and 'Email'. The 'Next Steps' section indicates 'No next steps. To get things moving, add a task or set up a meeting.' and the 'Past Activities' section indicates 'No past activity. Past meetings and tasks marked as done show up here.'



## Running Pega inside Salesforce Lightning

Once you've integrated Pega Process Extender for Salesforce Lightning, it's easy to dispatch Pega from inside Salesforce. The following example is an up-close look at a sample case process:

### Step 1

As a Salesforce user, you can create a new case or open an existing one on the Salesforce Lightning screen that contains the Pega Process Extender component.

### Step 2

The Process Extender uses Pega's Digital Experience API to render your Salesforce Lightning screen with Pega's user interface and business logic rules.

### Step 3

Within the Process Extender component, you are guided through the additional stages of the case while all processing is handled by the Pega Platform™.

### Step 4

If necessary, the Pega Platform routes the case to other agents to perform additional work. These agents can also access the case in Salesforce via the Process Extender component.

### Step 5

The case's progress is tracked and resolved with Salesforce and executed using Pega's business rules.

**Pega helps to streamline and expedite the process, from end-to-end, accelerating outcomes for the business and your customers.**

## Better together: Boost ROI and take Salesforce further with Pega

The added investment in Pega can help you get significantly more value out of your Salesforce tools. Now, you can:

- **Reduce costs** by optimizing non-Salesforce channels for choice, deflection, and issue resolution
- **Close gaps** in end-to-end automation, potentially leading to millions of dollars in savings
- **Avoid paying for increased delivery** and maintenance costs, driven by the extensive customization required to scale and harden your Salesforce platform. This often requires countless hard-code extensions that are time consuming, costly to write, and expensive to maintain, ultimately limiting your ability to move to Salesforce Lightning
- **Work in a 100% visual environment.** Pega isn't just a low-code environment – it's a no-code environment. This allows you to extend your Salesforce environment without additional coding, facilitating your journey to Lightning
- **Accelerate resolution for your customers** by empowering your agents to focus on solving the important problems, rather than tracking repetitive, manual work
- **Activate cases anywhere** with Pega's multi-dimensional cases that operate using a channel-less approach

Until you close these gaps, you're paying for opportunity costs stemming from missing functionality, lost revenue opportunities, decreased user productivity, and inability to transition non-Salesforce processes to less expensive, self-service channels. Getting there is easier than you may think.

Pega has demonstrated proven results for enterprise organizations, just like yours. According to an independent **Forrester Total Economic Impact (TEI) study**, these results include:

- **\$9.8 million average cost savings**
- **20% reduction in customer churn**
- **Less than 6-month payback period**
- **298% ROI**



So what's stopping you? Learn more about how you can increase ROI and supercharge your customer service investments for the scale and complexity of your business – all with Pega.



We are Pegasystems, the leader in software for customer engagement and operational excellence. Our adaptive, cloud-architected software – built on the unified Pega Platform™ – empowers people to rapidly deploy and easily change applications to meet strategic business needs. Over our 35-year history, we've delivered award-winning capabilities in CRM and digital process automation (DPA), powered by advanced artificial intelligence and robotic automation, to help the world's leading brands achieve breakthrough business results.

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