

Pega GenAI™

A game changer in time-to-value to value
and productivity



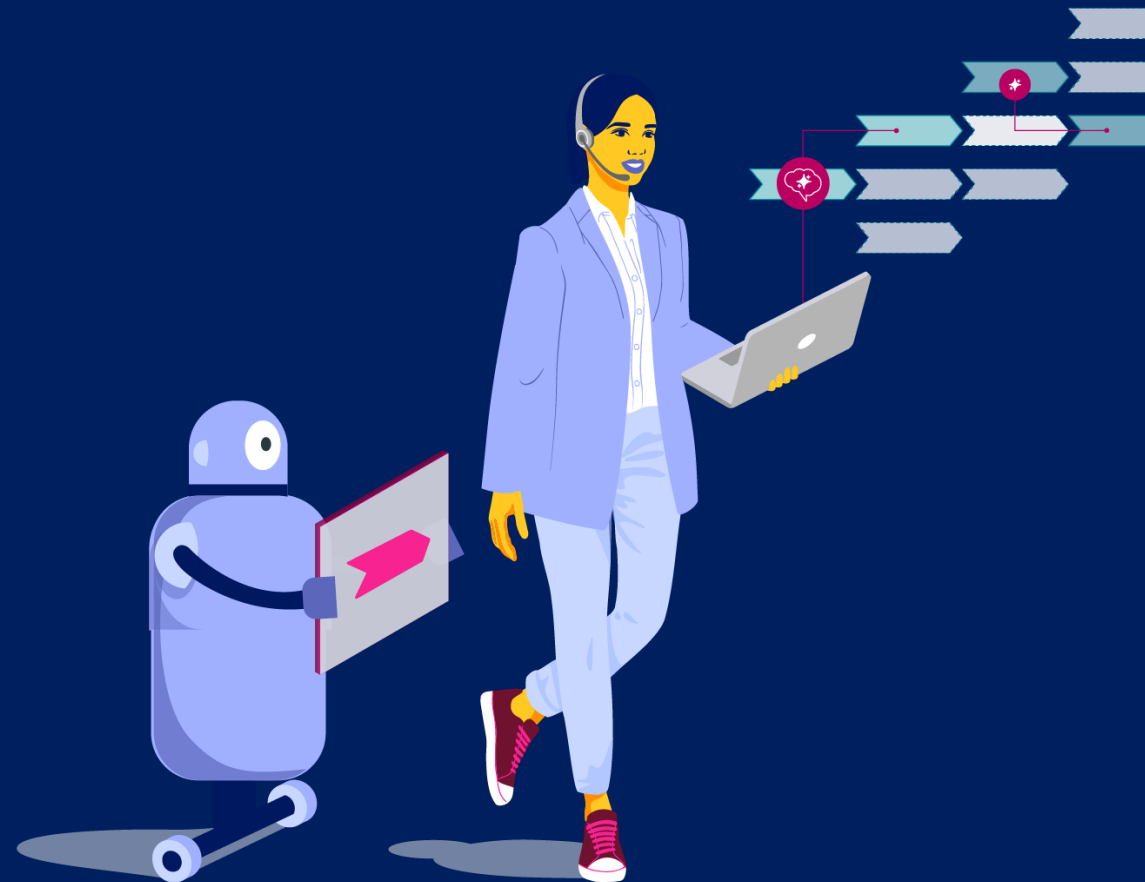


Pega GenAI™

A game changer in time-to-value and productivity

Jonas Edberg

Pegasystems | Nov 2024





AI will drive profound advantage.

Where will GenAI add the most value?

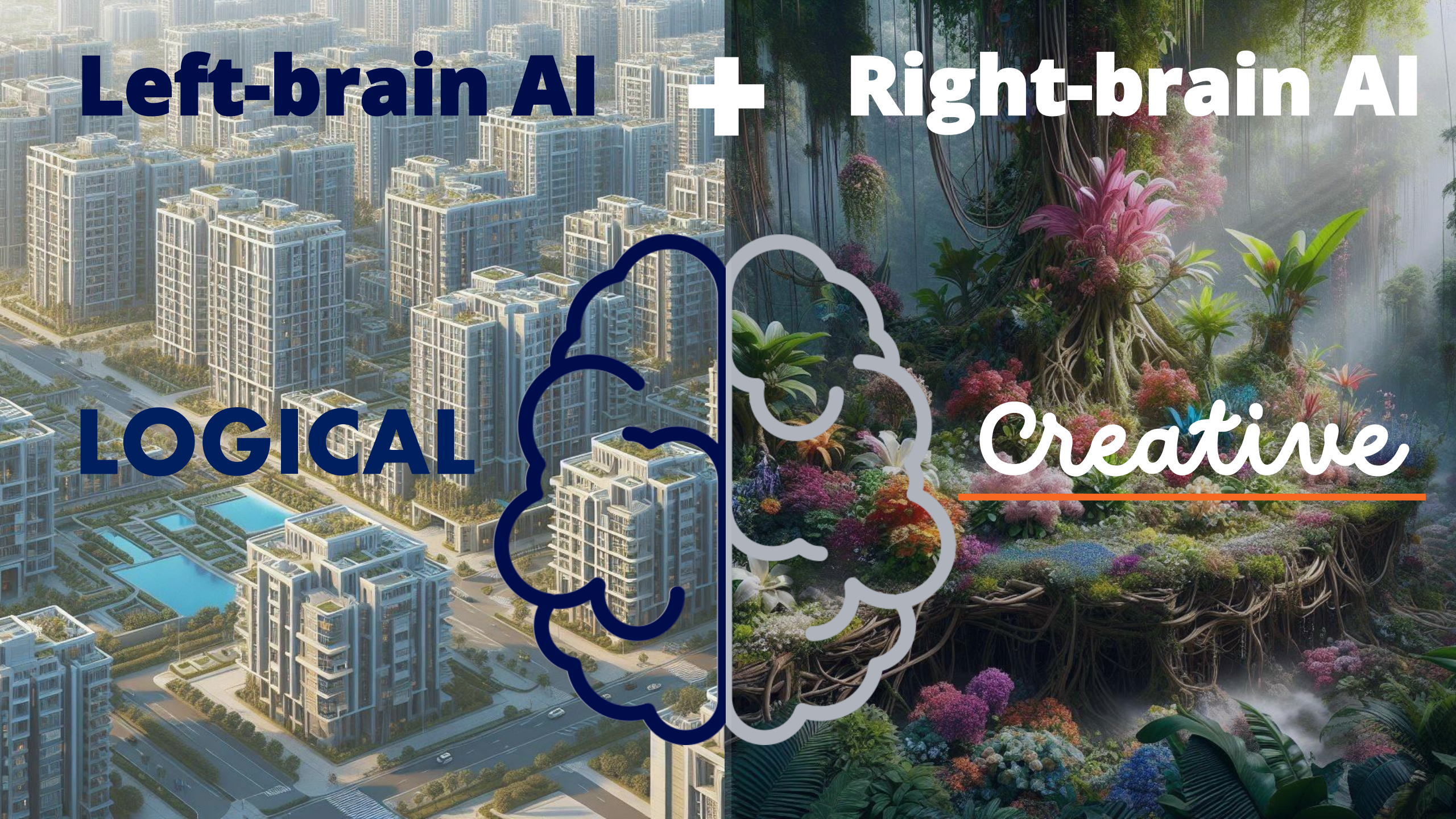
Left-brain AI



Right-brain AI

LOGICAL

Creative



How will you put limitless creativity *to work*?



Do More

Make every employee your best employee



Build More

Reduce development effort drastically



Envision More

Design your future business flows in minutes

How will you put limitless creativity *to work*?



Do More

Make every employee your best employee




Build More

Reduce development effort drastically



Envision More

Design your future business flows in minutes



**Scaling knowledge,
expertise & productivity
is no easy task.**

**...What if every employee
could be your best employee?**

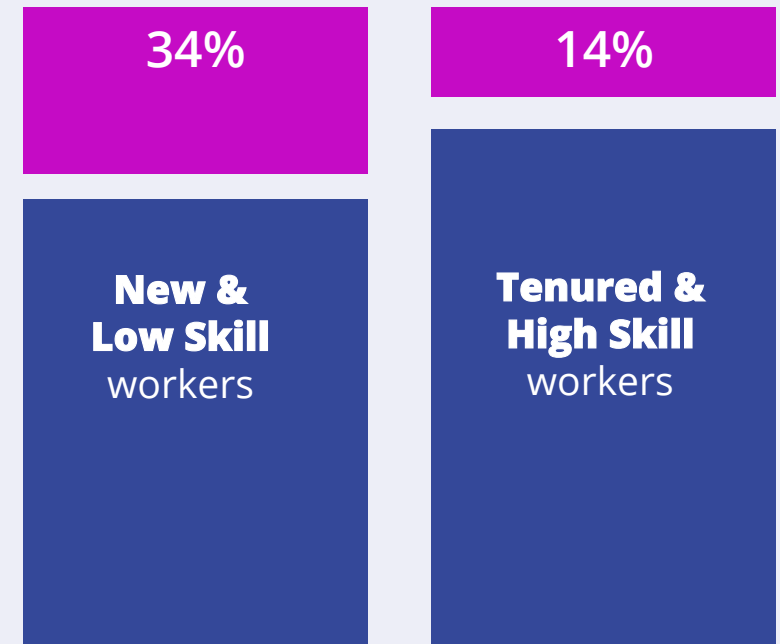


Early adopters are learning fast

34%

Improvement in call resolution for novice and low-skilled workers;
14% improvement for all agents

- National Bureau of Economic Research



Drive consistency, efficiency and empower your employees

Always know the next best step to take

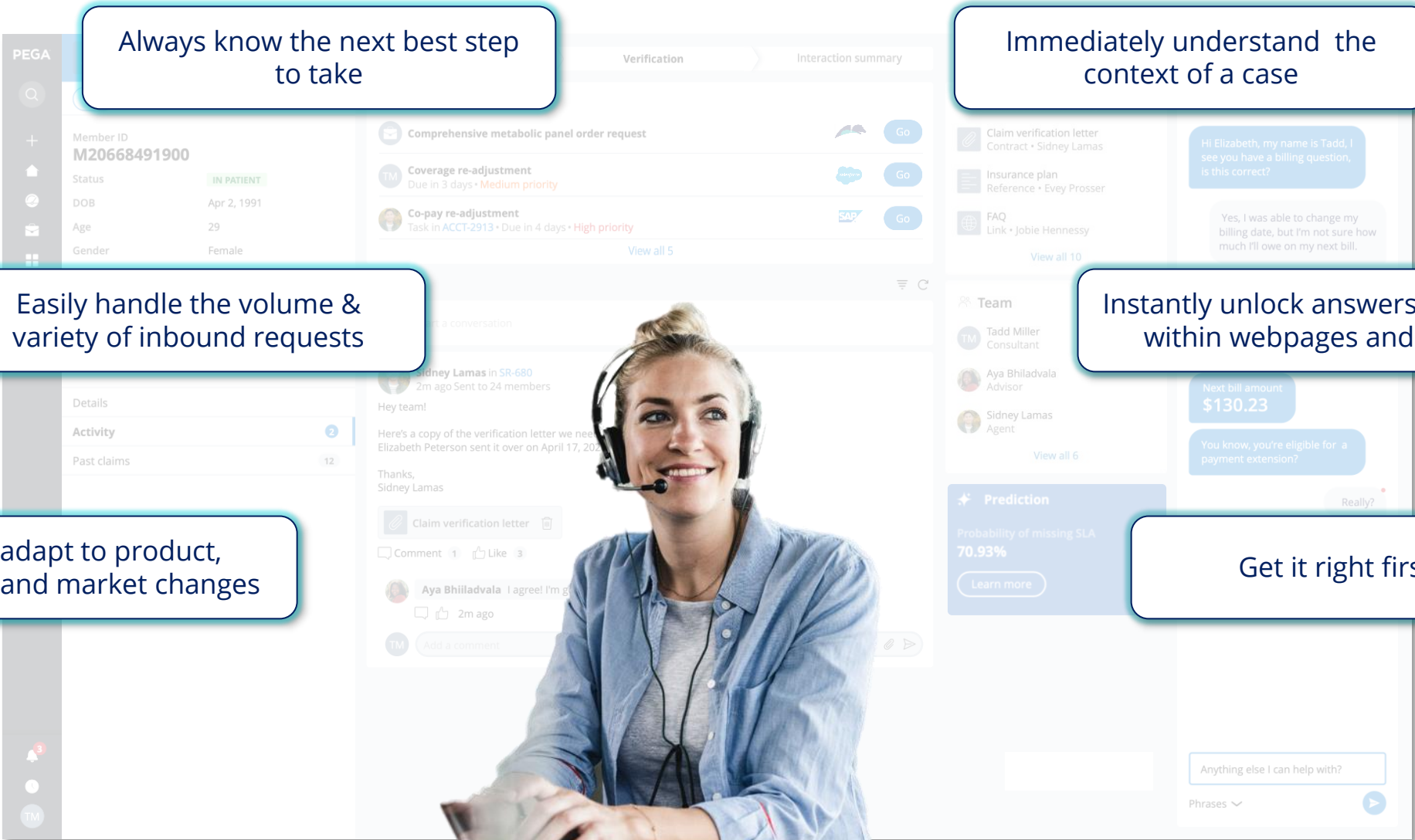
Immediately understand the context of a case

Easily handle the volume & variety of inbound requests

Instantly unlock answers trapped within webpages and PDFs

Quickly adapt to product, regulatory and market changes

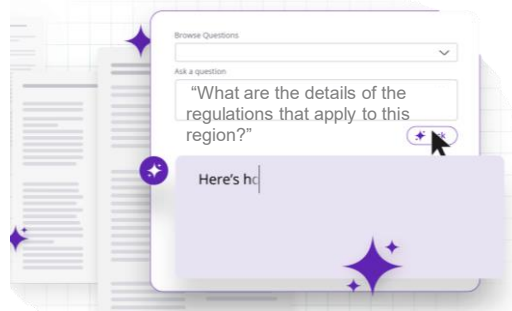
Get it right first time



Make every employee your best employee

with Pega GenAI™

Scale expertise

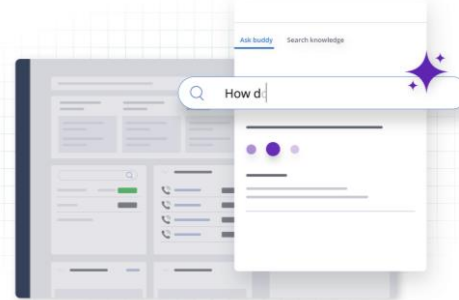


Ask your workflows

Pega GenAI Coach™

Scales expertise by directing employees with AI-powered guidance based on your specific best practices & policies.

Gain instant knowledge



Ask your documents

Pega GenAI Knowledge Buddy™

Connects employees with instant answers from disparate data sources via an easy-to-use conversation interface.

Make data work for you

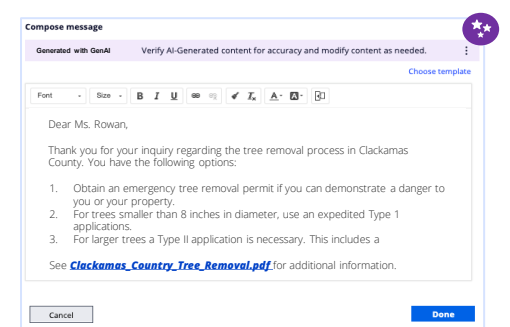


Chat with your data

Pega GenAI Analyze™

Turns GenAI-powered conversational prompts into reports that tell a cohesive story and inform high-impact action.

Focus on what matters



Automate tedious tasks

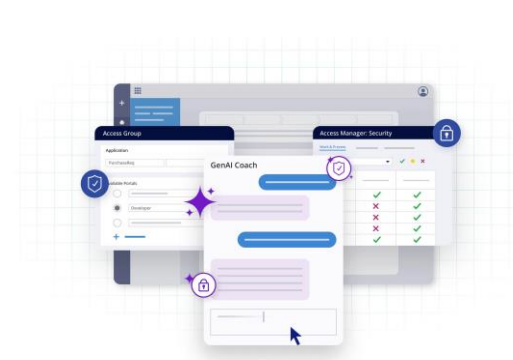
Pega GenAI Automate™

Enhances employee productivity by automating manual work like composing emails and chat



Pega GenAI™ Coach for any Case Type

Configure Pega GenAI™ Coach for any Case Type with specific instructions



Sales coach ⓘ

Using the system instruction and context as input, please assess and rate on a scale from zero to 10 for below point:

- How well are we following our Selling Methodology?
- What are open steps in the methodology that need more attention?
- How likely is this sale by the prescribed close date?
- What steps should the sales team do over the next week?

Based on the provided information, here is the assessment and rating for each point:

1. How well are we following our Selling Methodology?
- Rating: 7/10
- The opportunity is currently in the Solution Development stage, which aligns with the methodology. However, there is no information provided about the completion of specific

Message Sales coach

Enter your question

Verify AI-generated content for accuracy.

Sales Coach

Coach Sales executives on managing opportunities

Home Loan Summary Coach ⓘ

Craft a high-level summary chronologically while maintaining clarity and conciseness. The output should be in a paragraph format for the text. The summary should capture key events, assignments, and status changes, highlighting the sequence of actions taken by User.

User applied for a home loan. The application was submitted to the bank for review. The bank reviewed the application and requested additional documents from User. User provided the requested documents to the bank. The bank reviewed the documents and conducted a credit check on User. User's credit check came back positive, and the bank approved the home loan application. User was notified of the approval and provided with the loan terms and conditions. User accepted the loan terms and conditions. The bank processed the loan and disbursed the funds to User's account. User received the funds and began the process of purchasing a home.

Message Home Loan Summary Coach

Enter your question

Verify AI-generated content for accuracy.

Case Summary Coach

Guide employees to complete work



New enrollment
C-13001

Product type
Basic

Status **PENDING-REVIEW**

Customer name Sara Connor
Email s.connor@gmail.com
Application date January 16, 2024

Details

Pulse

History

Operations Coach

✓ Customer Information ✓ Credit Check Onboarding Decision

Approval
Due in 2 days • Urgency 45

Please approve or reject this new enrollment

Notes

Details

Personal information

First name Sara
Last name Connor
Date of birth May 3, 1981

Residence information

Current address 100 Main St, Cambridge, MA 02142, USA

Utilities

Attachments 1

Driver's license
Document • Sara Connor

Followers 5

Nathan Swanson
Manager

Glenn Simpson
User

Ralph Green
User

[View all](#)

Predictions

Probability of abandoning
75%

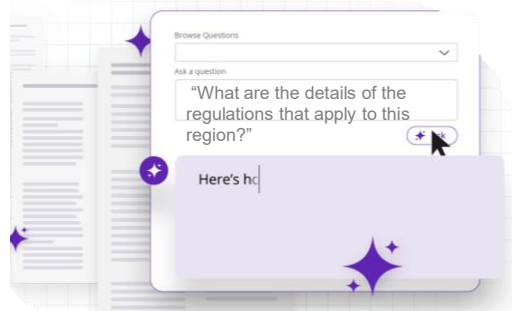
Knowledge buddy

Ask your question here ...

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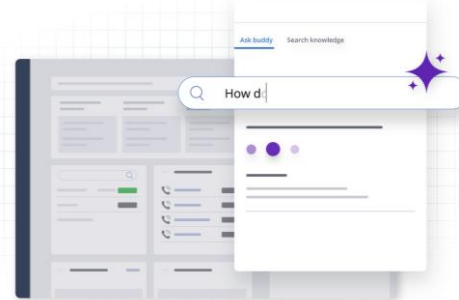


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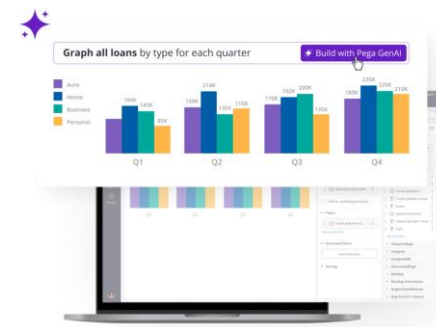


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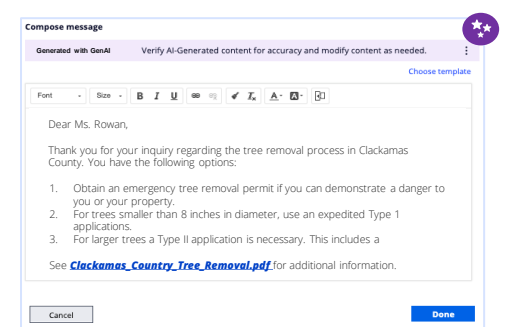


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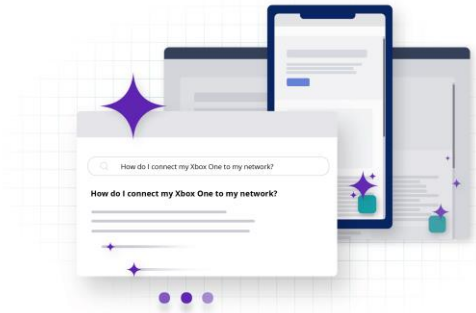
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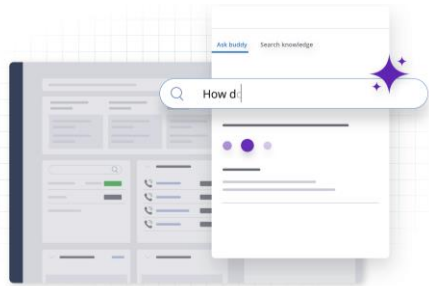


Pega GenAI Knowledge Buddy use case



Empower Customers

With concise, contextual answers across channels



Guide service agents

With instant AI-powered answers



Increase back-office productivity

With quick-to-find knowledge and guidance

Pega GenAI Knowledge Buddy

PEGA Digital Subscriptions

Q All Search...

New enrollment
C-13001

Product type
Basic

Status **PENDING-REVIEW**

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Email s.connor@gmail.com

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Onboarding Decision

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Notes

Cancel

Reject Approve

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75%

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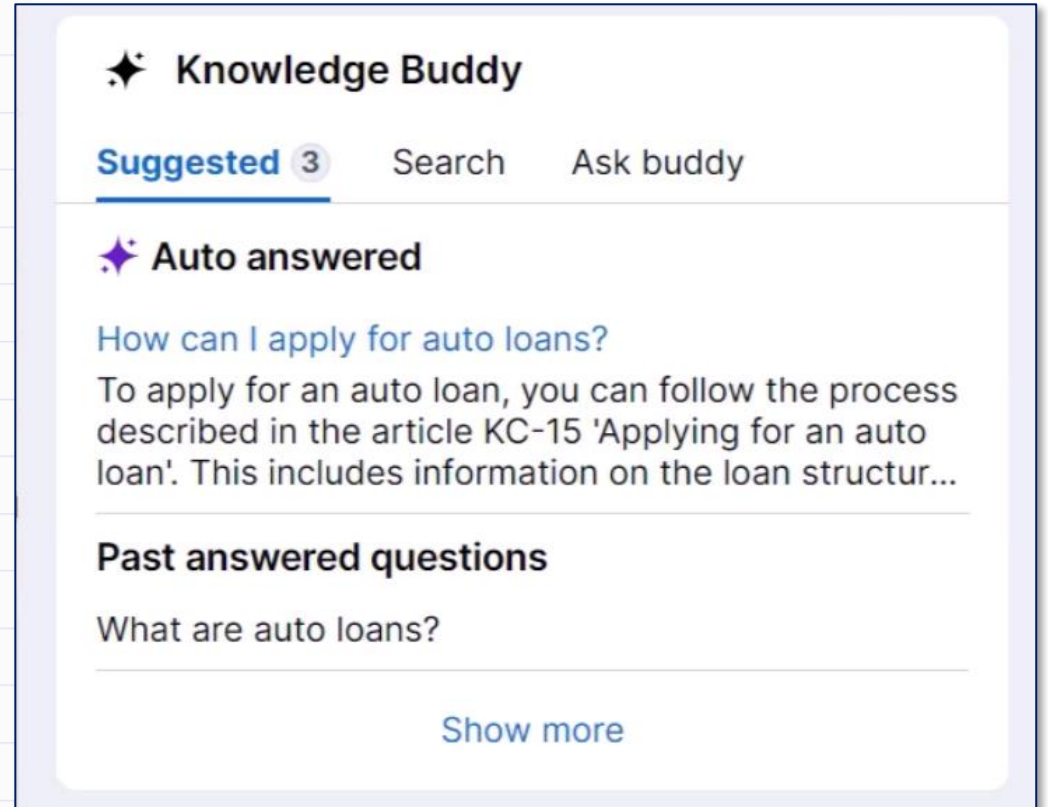
Ask your question here ...

Ask

Extend Pega GenAI Knowledge Buddy across interactions

AUTOMATE ANSWERS ACROSS VOICE AI & MESSAGING AI

- **Detect questions** - Utilize GenAI to detect questions across Voice & Messaging conversations
- **Eliminate question prompting** - Reduce manual typing and data prompting with contextual answers in real-time
- **Auto generate answers** from Knowledge Buddy to customers over any channel



The screenshot displays the Knowledge Buddy interface. At the top, it features a star icon and the text "Knowledge Buddy". Below this, there are three tabs: "Suggested" (with a count of 3), "Search", and "Ask buddy". The "Suggested" tab is currently selected. Underneath, there is a section titled "Auto answered" with a star icon. This section contains a question: "How can I apply for auto loans?". Below the question is a paragraph of text: "To apply for an auto loan, you can follow the process described in the article KC-15 'Applying for an auto loan'. This includes information on the loan structur...". Below this section is another section titled "Past answered questions". This section contains a question: "What are auto loans?". At the bottom right of the interface, there is a "Show more" link.

The Benefits with Pega Knowledge Buddy

Built for the Pega Ecosystem



Seamless integration with your Pega investments

Built for the Enterprise



Create fit-for-purpose buddies across the enterprise

Delivers Answers & Drives Action



Bridge from Q&A to launching actions to get work done

Total Visibility and Governance

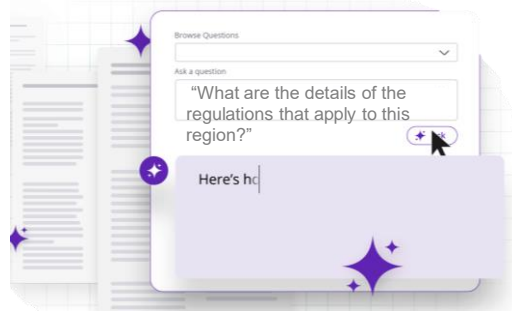


Ensuring full traceability and audit trail

Make every employee your best employee

with Pega GenAI™

Scale expertise

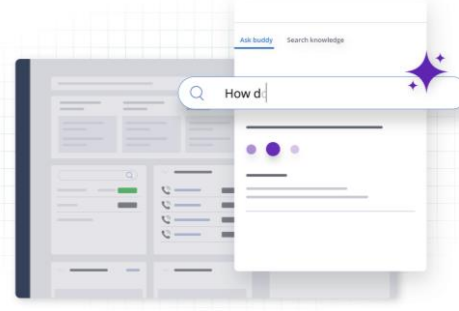


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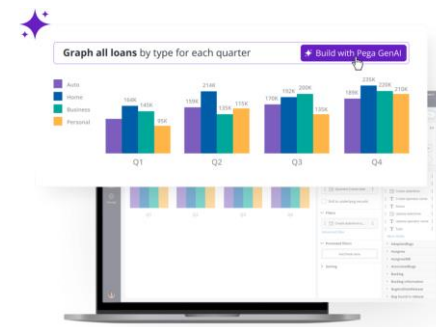


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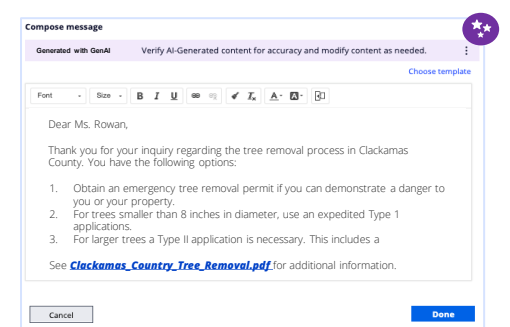


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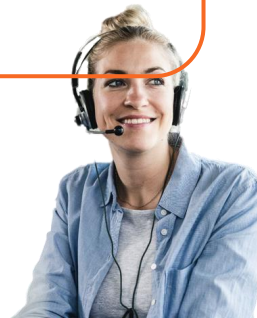
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Pega GenAI™ Analyse - Anyone to become a brilliant analyst

Explore Data with GenAI

Get actionable insights fast and promote self-service

- Explore data using natural language
- Leverage AI suggestions as starting points
- Improve your time to value

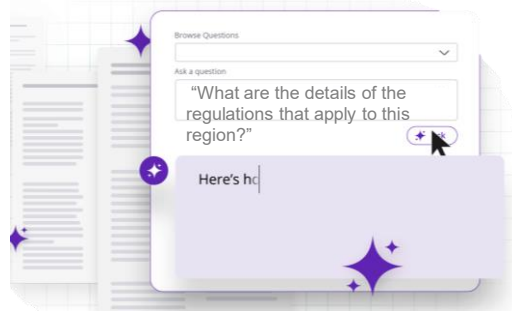
The screenshot displays the 'Explore Data' interface for 'Exploring: Flat Order'. At the top, there is a search bar labeled 'Chat with your data...' and a 'Generate with AI' button. Below this, a table shows 4,374 results with columns for Case ID, Customer, and Product. The table lists various orders, such as 'ORDER-102025' for Ryan Murray with a 'Majestic Mansion Dollhouse' and 'ORDER-100001' for Phil Dyer with '90% Silver Coins - \$100 Face-Value Bag'. To the right of the table is a sidebar with a 'DATA' section containing a 'Display as' dropdown set to 'Table'. Below this are sections for 'Fields' and 'Columns', each with a list of available fields and their data types. The 'Available fields' section includes 'Object' (Flat Order), a search bar, and a list of fields for 'Flat Order' such as Case ID, Customer, Product, OrderDateTime, Sales, Profit, City, Category, Order priority, State, Shipping mode, and Sub category. A 'More fields' link is also present.

Case ID	Customer	Product
ORDER-102025	Ryan Murray	Majestic Mansion Dollhouse
ORDER-100001	Phil Dyer	90% Silver Coins - \$100 Face-Value Bag
ORDER-100002	Bella Nolan	Shearling Sweater Coat by Venus - Size M, Neutral/white, Women's
ORDER-100525	Jack Mitchell	DW13 12-Cup Switch Coffeemaker
ORDER-100546	Owen Lewis	XP-830 Premium All In One Printer
ORDER-100645	Stephen Fisher	Wall Mount TV Stand - Terra Mar Clove
ORDER-100251	Brian Roberts	Men's Relaxed Fit Carpenter Jeans - Antique Stone 32x30
ORDER-100252	Liam Black	Women's Extended Shoulder Surplus Bodice with Artichoke Skirt, Black, 12
ORDER-100253	Warren Walsh	Polar A360 Bluetooth Strapless Heart Rate Monitor
ORDER-100646	Karen Henderson	Scalloped Folding Card Table
ORDER-100003	Melanie Dickens	PIXMA MG3520 Inkjet Multifunction Printer - Color - Photo Print - Desktop (Printer, Copier, Scar
ORDER-100004	Jason Black	Ohio State Mission Stained Glass Table Lamp
ORDER-100005	Liam Nolan	PIXMA MG2922 Wireless Inkjet All-In-One Printer/Copier/Scanner
ORDER-100006	Fiona McDonald	HP 19-2404 All-in-One Desktop
ORDER-100007	Lisa Thomson	Somette Rayne Indoor/ Outdoor Rattan 24-inch/ 30-inch Counter/ Bar Stool (Rattan 24-inch Co

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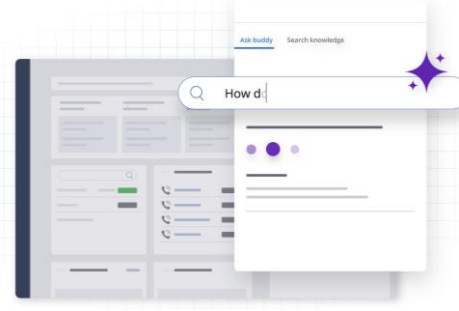


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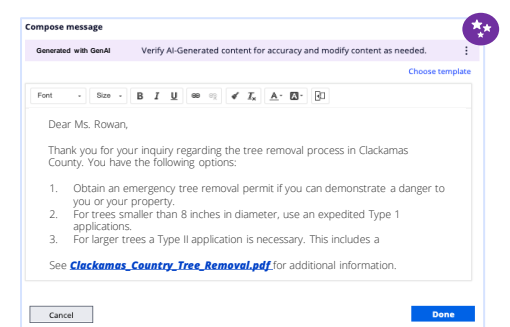


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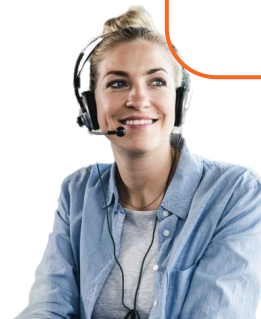
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GenAI Automate



Compose emails & messages tailored to the customer

Draft an email to this customer detailing a home insurance quote.



UBank Customer Service

Search...

Thank you for calling U+ bank, Mrs. Parker. This is Jason speaking. How can I help you today?

Compose message

Verify AI-Generated content for accuracy and modify content as needed.

Choose template

Font - Size - **B** *I* U [Link] [Image] [Checkmark] [Text color] [Background color] [Align]

Dear [InsuredName],

Thank you for considering our Home Insurance policy. We have received your request for a quote and would like to provide you with the following options:

Coverage Type: <<CoverageType>>
Coverage Amount: \$<<CoverageAmount>>
Deductible Amount: \$<<DeductibleAmount>>
Property Type: <<PropertyType>>
Property Value: \$<<PropertyValue>>
Policy Start Date: <<PolicyStartDate>>
Policy End Date: <<PolicyEndDate>>
Premium Amount: \$<<PremiumAmount>>

Please let us know if you have any questions or concerns. We look forward to hearing back from you soon.

Best regards,
[SenderName]

Cancel Done

Suggested actions

- NEW Add account participant AI suggested

Customer: Shea Parker

Lifetime value: Platinum | Interaction goal: Nurture

Verification status: Verified

Customer tenure: 21 years 10 months

Call back: +1 617 435 7301

Primary language: English

Last interaction: Inbound Call - May 19, 2024

Total deposits: \$18,029.17

Total borrowed: \$5,208.76

Churn risk: Low

Accounts

- Customer
- Recent activity
- Recent offers

Utilities

Last interaction summary

May 19, 2024

Channel

Home Call I-28026

Inquiry

Service agent at U Plus Parker in changing statement t.

ked about special features for ns in the U Plus Teen Checking

per that legal guardians can owanced, make one-time oals, remove money, and

icles

Enter a search

Sort by

Most recent Clear

A Comprehensive Guide

w certificates of deposit (CDs) ing to building a CD ladder, and

unds Transfer Choices

he different time frames, t, fees, and requirements for the ransfer methods: wires, ACH an...

GenAI Automate



Suggest a chat reply based on the context messages tailored to the customer

Suggest a chat reply to the customer around a teen checking account



UBank Customer Service

Shea Parker
Customer

Lifetime value
Platinum

Verification status
Verified

Customer tenure
21 years 4 months

Call back
+1 617 435 7299

Primary language
English

Last interaction
Channel API - Nov 14, 2023

Total deposits
\$115,855.79

Total borrowed
\$2,887.57

Accounts

Customer

Recent activity

Recent offers

Suggested actions

Channel API

Shea Parker

SP Chat with an agent
09:12:42 PM

Authenticated as "CONF5-208"
09:12:46 PM

I can help you with that. Please select from the following so that I can route you to the best agent.
09:12:46 PM

SP General
09:12:49 PM

Please wait while I connect you to an agent.
09:12:51 PM

09:12:53 PM

09:12:55 PM: You are number 3 in the queue.

09:13:02 PM: Customer has connected.

Can I take the last 4 digits of your account please?
09:13:09 PM Sent

NEW MESSAGES

SP Sure, the last 4 digits of my account are 2007.
09:13:12 PM

Suggested replies

Hi Ms. Parker. Thanks for contacting U+ Bank. My name is Skye and I am happy to help you today. It looks like you would like to manage the participants on your teen checking account. Is that the reason for contacting us today?

Edit Send

Collapse

Phrases Send

Channel API

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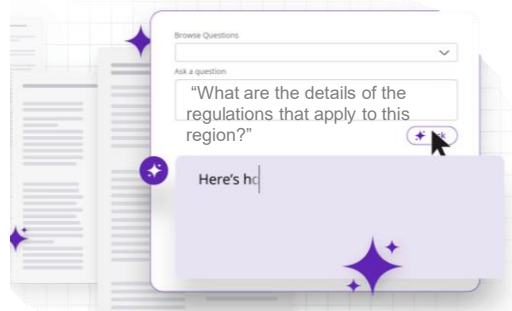
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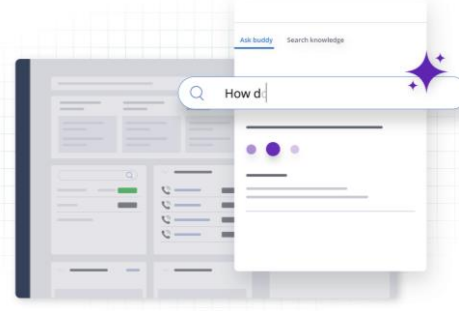


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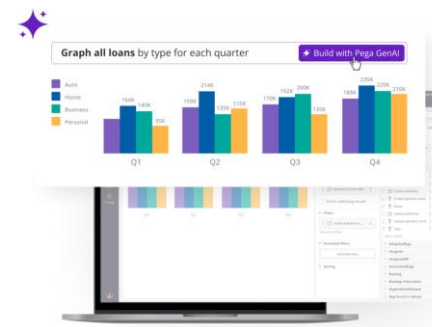


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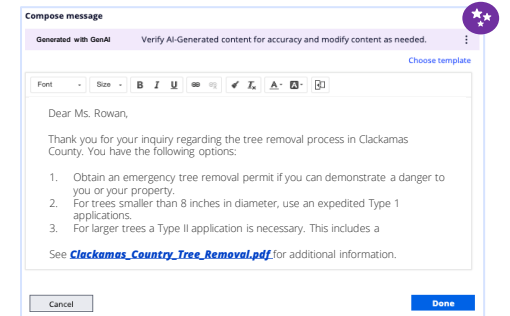


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Reduce development effort drastically



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Design your future business flows in minutes

Demand for developer skills is higher than ever... and growing.



...what if you could double developer productivity?

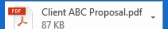
Accelerate workflow development with Pega GenAI Autopilot™

Turn ideas into enterprise-grade low-code apps



Pega GenAI™ Autopilot

Can you build an authorization exceptions process using this process document as a basis?


 Client ABC Proposal.pdf
87 KB

Leverage assets in my enterprise reuse library where possible!

All set! **Check out your new workflow**

I was able to reuse the **Customer module** from your reuse library.

Thank you!



Continuous Learning

- Instantly access technical guidance for building in Pega.
- Obtain specific insights into your app architecture instantly.

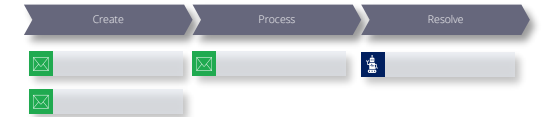
How do I build a Chat Bot?

Here are the steps you'll need to follow: design the conversation flow, train the chatbot, and integrate with channels.

Start

Build & change

- Let Autopilot handle the heavy lifting - from developing new apps to enhancing existing ones.
- Automate capability additions and adaptations

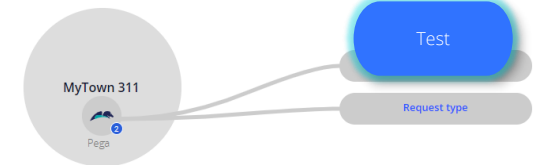


Go

Test & deploy

Use Autopilot for:

- Automated test scenario creation and execution.
- Documenting application functionality.
- Automating deployment to production through CI/CD pipelines



ROADMAP

Enable developers to get up-to-speed quickly and build & change enterprise workflows in seconds, just by asking.

Pega GenAI Autopilot™

APP STUDIO Application : Uplus Retail

Preview DEVELOPMENT

Overview

Uplus Retail [Edit](#)

DEVELOPMENT <https://edbej.pegatsdemo.com/prweb/app/uplussample/>

Uplus retail brings the power of banking to your fingertips, offering a seamless and secure way to manage your finances anytime, anywhere. Whether you're checking your account balance, transferring funds, paying bills, or even applying for a loan, our intuitive app provides a comprehensive suite of features designed to simplify your banking experience. [Read more](#)

Version: Pega Infinity '24.2 [About](#) Application documents [Export](#) Application profile [Manage](#)

Personas [Manage \(11\)](#)

- Authors**
CosmosReact authors
- Case Manager**
ComplaintsInvestigator
- Complaints Investigator**
ComplaintsInvestigator
- Dispute Analyst**
DisputeAnalyst

Channels [Manage \(11\)](#)

- Uplus Retail**
Uplus Retail
- Data Portal**
Portal for creating, editing, and deleting d...
- Pega Email Manager**
Pega Email manager is a single view for al...
- Inquiry**

Case Types [Manage \(19\)](#)

Account closure

- Validate Closure Information
- Account Closure Approval
- Account Closure

Account fee complaint

- Initial Complaint Review
- Investigation
- Resolution

Account maintenance orchestration

- Capture Information
- Process Account Updates
- Update Parties

Account update

- Validate Update Information
- Approval Process
- Completion

Activate my card

- User Verification
- Payment Setup
- Payment Processing

Data Objects [Manage \(22\)](#) [View Data Model](#)

Pega Infinity™

What's new in Infinity '24.2?

★ Pega GenAI™ Blueprint

Extend your application

Import Case Types, Data Objects, or Personas into your existing Application from a Blueprint. [Import a Blueprint](#)

Design for the future

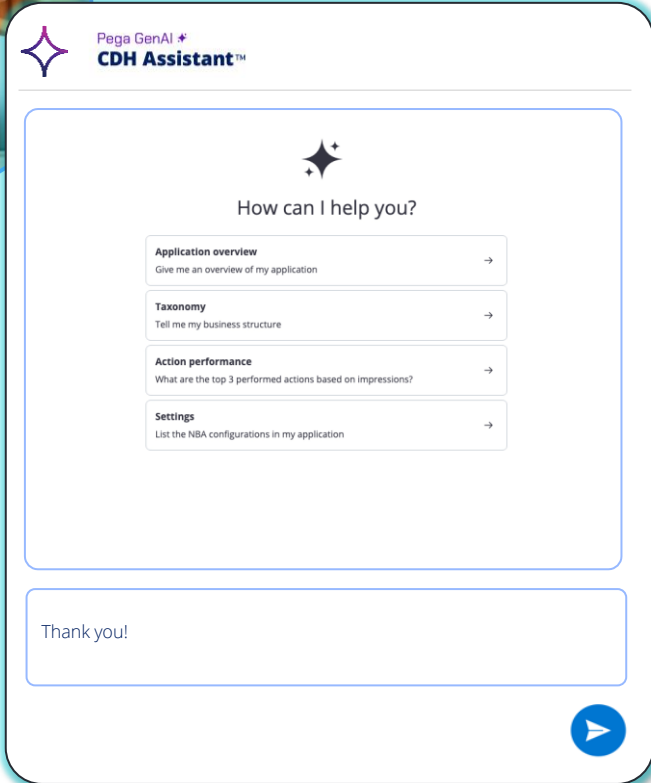
Export your existing Application as a Blueprint to design the future of your workflow Application. [Export as Blueprint](#)

Application layers

- Uplus Retail**
01.01.01
- UplusCore**
01.01.01
- DemoXReactComponents**
01.01.01

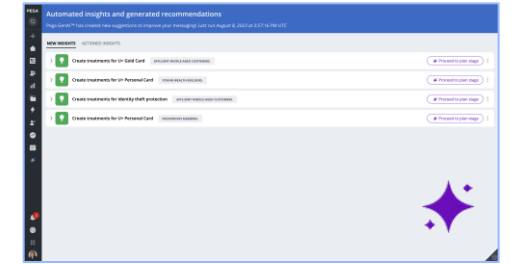
[Load more](#)

Pega GenAI™ CDH Assistant



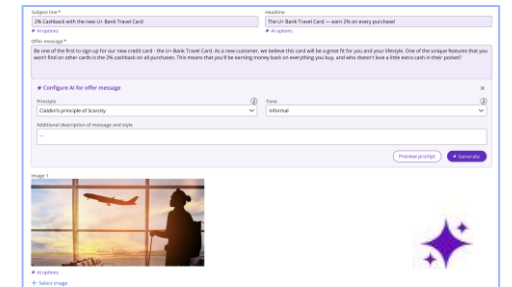
Suggested Recommendations

- Recommends suggestions to enhance the Next-Best-Action library
- Analyzes underserved customers and identifies actions needing more treatment variation.
- Automatically generated improvement suggestions help optimize engagement strategies.



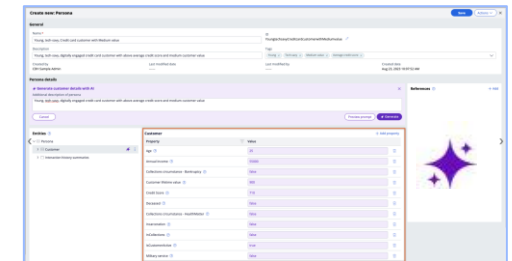
Treatment Creation Assistant

- Improve treatments by offering text and image suggestions
- Apply Cialdini's persuasion principles to adjust the tone
- Generate variations to tailor the content to different customer preferences



Population Targeting & Validation

- Facilitate rapid testing of engagement policy logic.
- Automatically generates sample personas for various populations



PEGA OpsCR-29 ☆

Update Credit Card Engagement Policy

[Edit](#) Actions ▾

Rank
--

Status DETAILS-NEEDED

Objective Edit NBA Engagement Policies

Completion date March 31, 2023

Business issue Sales

Group Credit Cards

Created [OmniNBA Admin](#)
about a minute ago

Updated [OmniNBA Admin](#)
less than a minute ago

Details

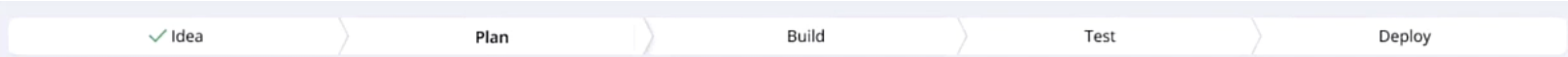
Pulse

Artifacts

Dependent changes 0

2

OM



- To do**
- T Rank change request
Rank change request (Plan) • Due 3 days from now • ⋮
 - T Add tasks
Add tasks (Plan) • Due 3 days from now • ⋮

Details

Description
Remove the applicability policy

Change request details

Created on	March 13, 2023 at 12:10:00 PM
Created by	OmniNBA Admin
Updated on	March 13, 2023 at 12:10:01 PM
Updated by	OmniNBA Admin

📎 1

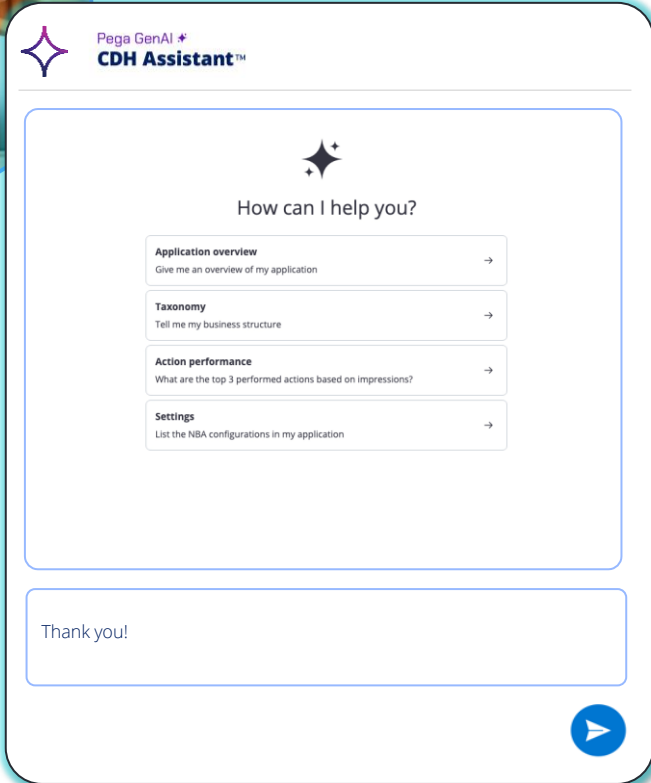
👥 0

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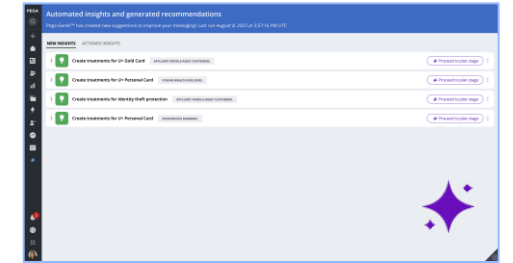
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Pega GenAI™ CDH Assistant



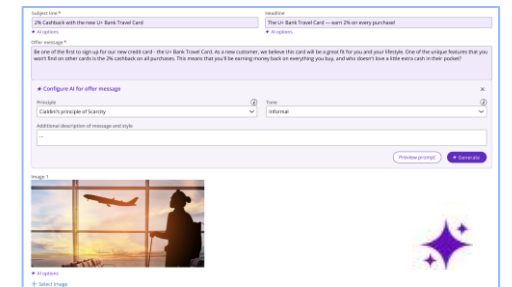
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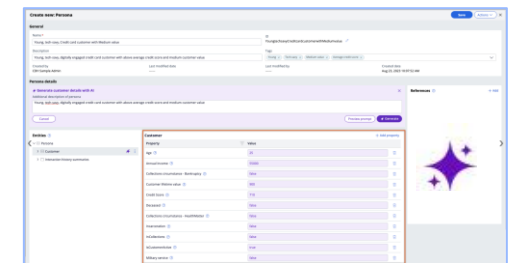
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PEGA OpsCR-29 ▼ ☆

Update Credit Card Engagement Policy

Search

+

Home

Rank

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Status **DETAILS-NEEDED**

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Business Issue Sales

Group Credit Cards

Created [OmniNBA Admin](#)
about a minute ago

Updated [OmniNBA Admin](#)
less than a minute ago

Details

Pulse

Artifacts

Dependent changes 0

2

OM



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- Rank change request**
Rank change request (Plan) • Due 3 days from now •
 - Add tasks**
Add tasks (Plan) • Due 3 days from now •

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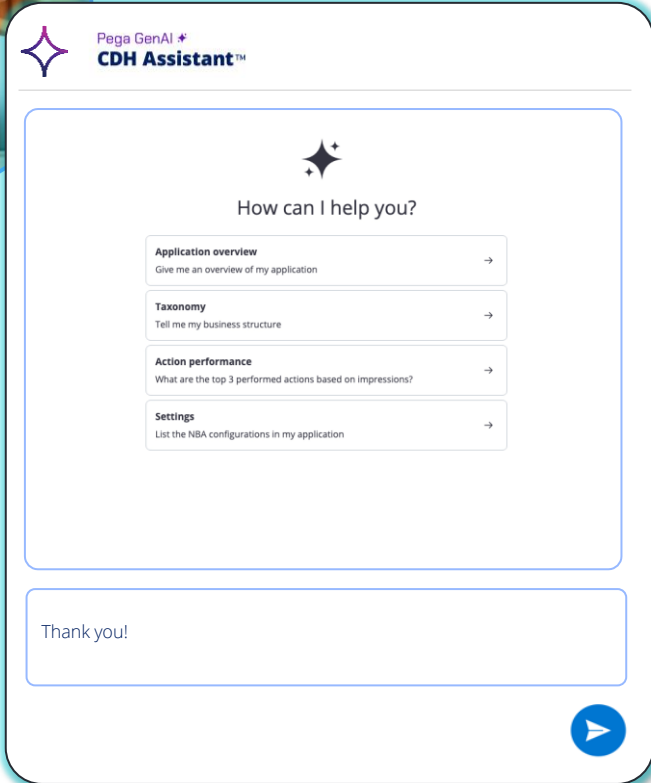
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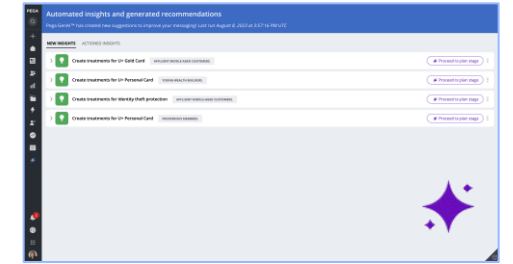
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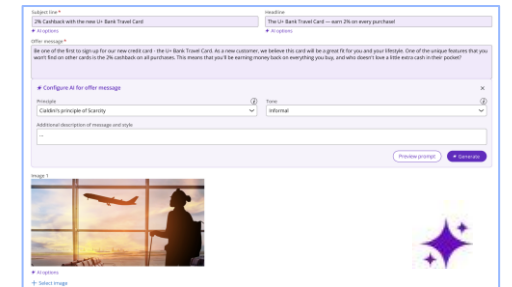
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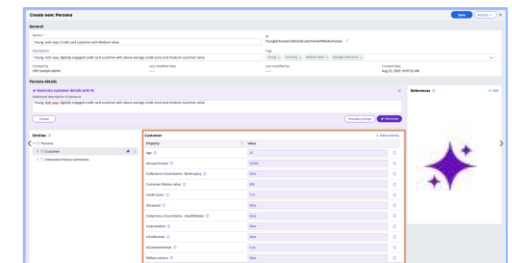
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PEGA

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Persona Management

Create ▾ Help

- New persona
- Persona from file
- Persona from existing customer
- Persona >
- Channel context

Search *
 Apply

Display only withdrawn personas

Persona Channel context

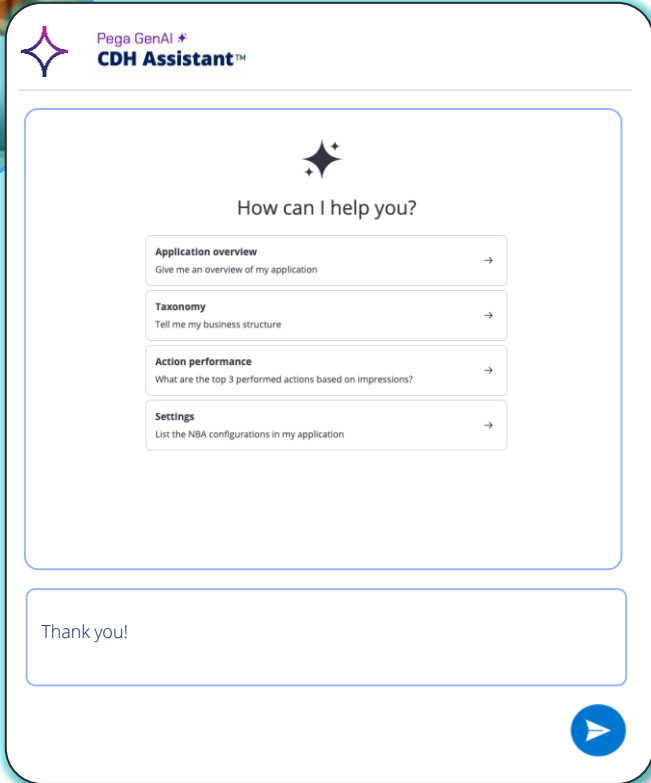
Q Search... 18 results

Default view ▾ Group Fields Density Refresh

Name	Tags	Last modified by	Last modified date	
Home Loan Customer	Data	Data	Data	⋮
Needs Assessment Customer	Data	Data	Data	⋮
Churn Customer	Data	Data	Data	⋮
Loyal Customer	Data	Data	Data	⋮
Credit Card Customer	Data	Data	Data	⋮
Unknown Customer	Data	Data	Data	⋮
Collections Customer	Data	Data	Data	⋮
Active Customer	Data	Data	Data	⋮
Head of Household	Data	Data	Data	⋮
Retired High Net Worth	Data	Data	Data	⋮
Student Low Credit Score	Data	Data	Data	⋮
Established Business Owner	Data	Data	Data	⋮
Business Traveler	Data	Data	Data	⋮
First Time Homebuyer	Data	Data	Data	⋮
Middle-Aged Investor	Data	Data	Data	⋮
High Net Worth Investor	Data	Data	Data	⋮

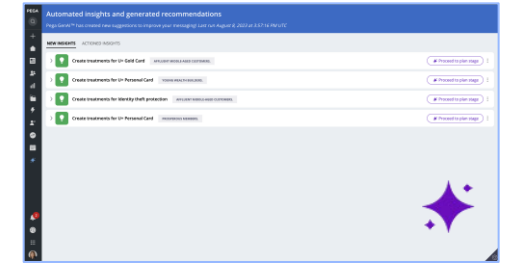


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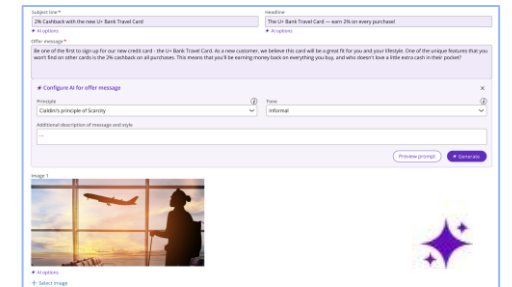
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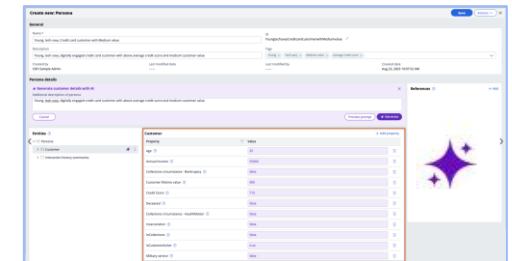
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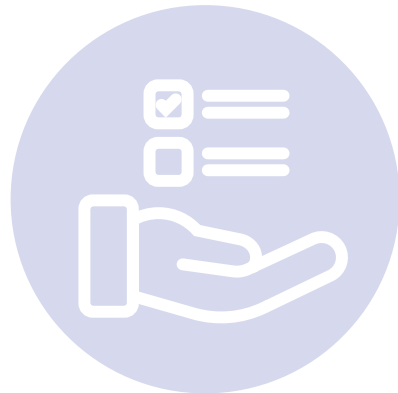


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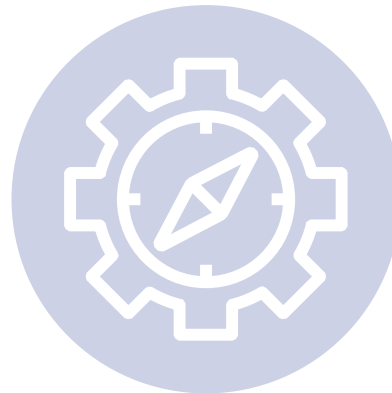


How will you put limitless creativity *to work*?



Do More

Make every employee your best employee



Build More

Reduce development effort drastically



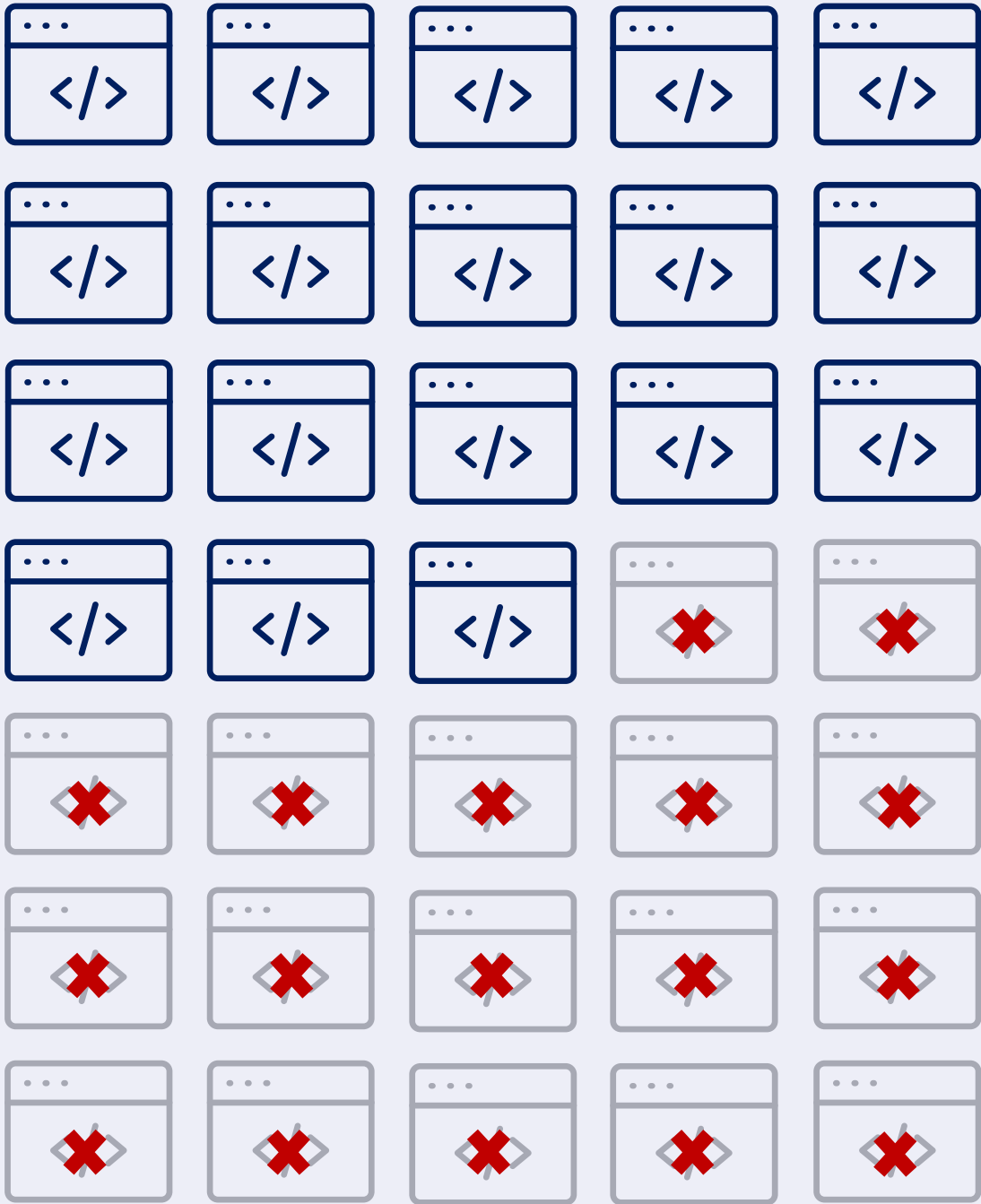
Envision More

Design your future business flows in minutes

Business transformation takes years... and a lot of meetings.

...what if you could re-imagine your core business processes in minutes... and deploy in less than 90 days?





44%

of failed projects are due to a
**lack of alignment between
business and objectives**

- Project Management Institute



Pega GenAI™ ✨

Blueprint

Envision how AI and automation
can transform your workflows

Blueprint it.

pega.com/blueprint





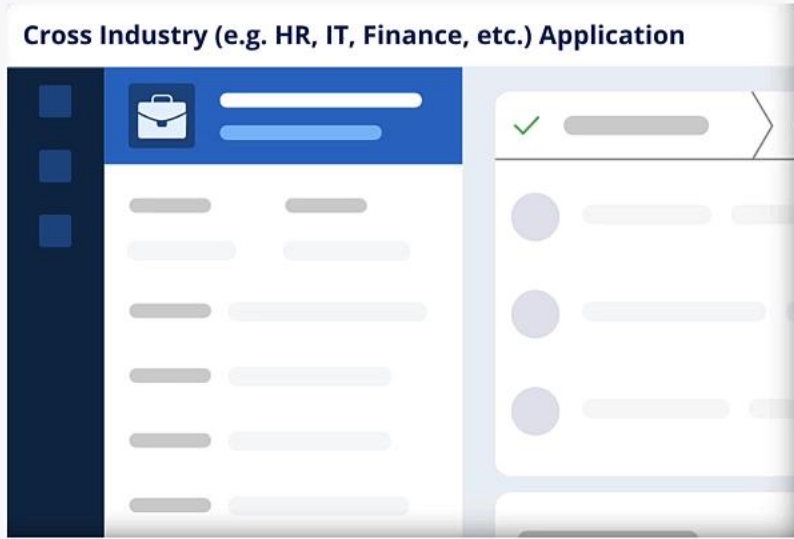
Pega GenAI **Blueprint™**

My Blueprint Dashboard

Let's start your Blueprint

Which industry is your application for? ⓘ

- Banking
- Communications
- Consumer Services
- Cross Industry (e.g. HR, IT, Finance, etc.)**
- Energy & Utilities
- Government
- Healthcare
- Insurance
- Manufacturing
- Transportation & Logistics
- Other



Back

Cancel

Next

How will you put limitless creativity *to work*?



Do More

Make every employee your best employee



Build More

Reduce development effort drastically



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