PEGA CLIENT SERVICE FOR COMMERCIAL, CORPORATE & WHOLESALE BANKING

Prepare For The Next Generation Of Tech–Saavy Clients With Engaging, Simplified, Agile Service

A PEGA FINANCIAL SERVICES DATASHEET

Agile Solution Meets Tomorrow's Needs

Pega offers the industry's most agile service platform for achieving the vision of a clientfocused organization that reaches new levels of profitability, productivity and proactive response to market opportunities and changing regulations.

With Pega Client Service, banks can manage the client lifecycle from end-to-end by dynamically adapting each interaction to support specific client segmentation strategies. Whether you are looking for a solution that offers a complete 360-degree view of the client to help your representatives know each individual; need to streamline inquiry and service request management with intelligent process automation; or want to enhance the efficiency of client service representatives with a role-based desktop, Pega can meet your needs.

- **Personalize the client experience**
  Make every interaction an efficient, client-centric experience using context-driven processes to dynamically guide representatives through each step.

- **Present one company to the client**
  Give representatives the global insight they need with a complete, real-time view of the client across all products, lines of business, channels and interactions.

- **Deliver a seamless experience across all channels**
  Offer consistent service over every channel with Pega's omni-channel capabilities. With Pega, you can mash up our processes and UI into existing mobile and web applications for a seamless experience, saving time and money. You can also cobrowse or chat with clients during interactions for a truly tailored experience.

- **Scale operations efficiently**
  Simplify operations using end-to-end work automation and wizard-driven legacy system integration to eliminate error-prone manual work and scale efficiently via straight- through processing from front-to-back-office.

CHALLENGE

The next generation of tech-saavy clients are in search of a better service experience that addresses their exact needs. Banks must deliver high-touch service for less, despite business line silos, a maze of channels, and disjointed business systems.

SOLUTION

Pega Client Service delivers a unified platform for simultaneously strengthening client relationships and optimizing service delivery. Leveraging the advanced technology of Pega 7, commercial banks can provide personalized client experiences, increase their productivity, promote higher revenue and facilitate proactive responses to change.

BUILD FOR CHANGE®

## Deliver Exceptional Client Experiences

- Intelligent processes dynamically guide users through each step to ensure every interaction is a productive, personalized client experience.

- End-to-end case lifecycle management and control manages all service request tasks for comprehensive visibility, tracking and process consistency across channels.

- Pega's self-service portal offers transparency and service initiation via the Web and mobile devices, enabling clients to search transactions, initiate investigations, review open and resolved exceptions and view reports.

- Pega's role-based desktop eliminates extensive searches through isolated systems with complete client- and householdcentric visibility across every account and activity, including onboarding and service case history.

- Omni-channel user experience transparently transitions activities across any channel and device, including phone, mobile, Web, email, chat and social media.

Maximize Service Efficiency

- End-to-end work automation increases productivity by automatically eliminating duplicate requests, delivering relevant documents and intelligently routing, prioritizing and tracking cases.

- Standards-based integration capabilities unite streamlined Pega processes with legacy and third-party systems to seamlessly transition work from front-to-back-office and provide real-time data access and use.

- A common platform for managing regulations and rule-based processes supports specialization by country, line of business, product and other business factors and automatically applies the right regulations at the right time to increase compliance.

Increase Business Agility

- Pre-defined easily configurable processes, rules, object and data models, interfaces and other application assets accelerate implementation time.

- Familiar office tools and wizards let business users rapidly create processes and rules as well as customize Pega's pre-defined components to your exact business requirements without any coding.

- Pega's build-once-and-reuse-everywhere capabilities enable application assets to be shared across products, lines of business, geographies and channels, eliminating the need to create separate applications for each variation.
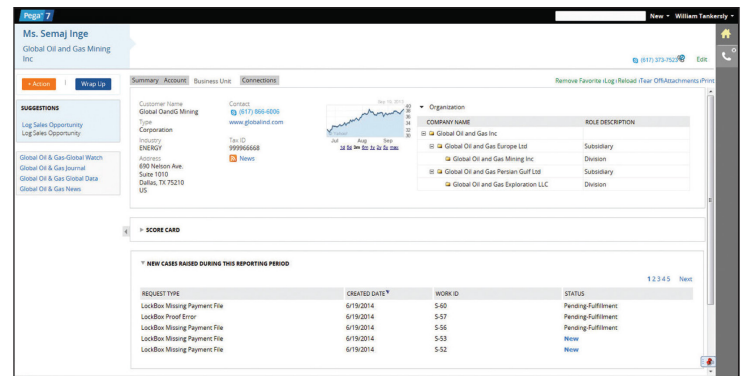
Pega Client Service provides a complete solution for managing all types of client service, enabling service teams to deliver client- focused interactions with optimal efficiency.