

# Pega Keynote

Alan Trefler  
Pegasystems





# Alan Trefler

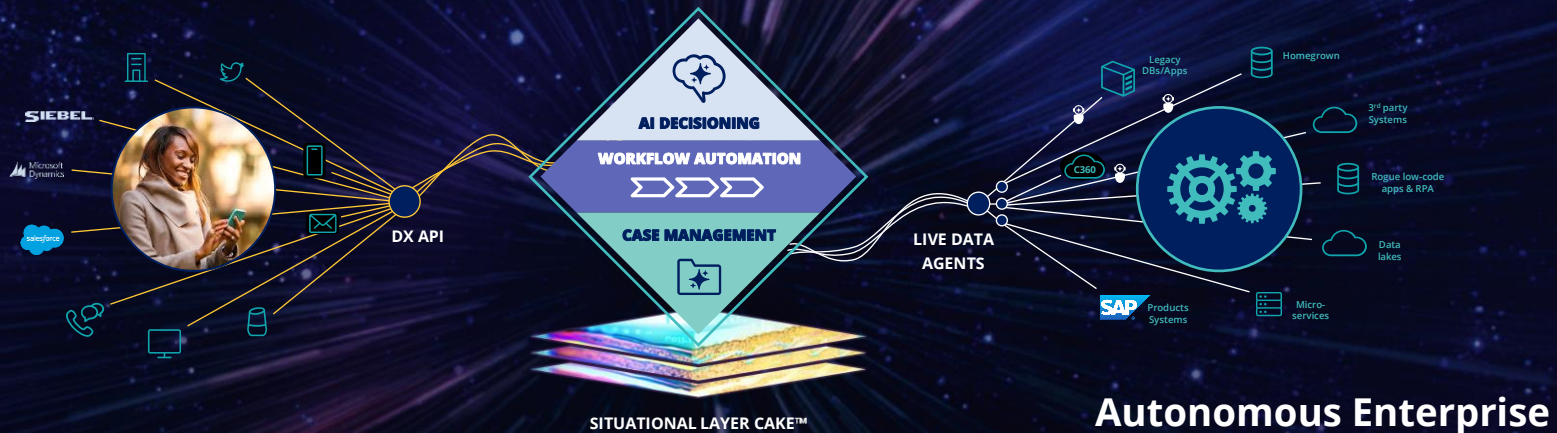
Founder and CEO | PEGA



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# Center-out® Business Architecture





**Put expertise  
at your  
fingertips**

**Double  
developer  
productivity**

**Continuously  
optimize  
autonomous  
enterprise**



Put expertise  
at your  
fingertips

Pega GenAI ✦  
**Knowledge Buddy™**

Pega GenAI ✦  
**Socrates™**

Double  
developer  
productivity

Pega GenAI ✦  
**Blueprint™**

Continuously  
optimize  
autonomous  
enterprise

Pega GenAI ✦  
**Coach™**

Pega **Process Mining™**

Pega **Process AI™**



# Digital ~~PEG~~ <sup>AG</sup> ~~Ansfortgung~~ <sup>Investition</sup>

The image features a dark blue, starry background with a central starburst effect. Numerous thin, bright lines radiate from the center, creating a sense of depth and movement. The text 'PEGAInfinity' is centered in the image. 'PEGA' is in a light grey font, 'I' is in a vibrant pink, and 'nfinity' is in a light grey font. A small, stylized starburst icon is positioned above the 'I' in 'Infinity'.

PEGAInfinity



AI

# 1 AI Decisioning

The screenshot displays the PEGA Customer Decision Hub interface, specifically the Next-Best-Action Designer for a Refinance Mortgage Journey. The interface is organized into several sections:

- Navigation and Search:** Includes a search bar, a 'Help' button, and a user profile icon (MK).
- Design Tools:** Five main tool cards are visible: Taxonomy (Define your Next-Best-Action business structures and customer journeys), Constraints (Set inbound and outbound channel limits and suppression policies), Engagement policy (Capture business rules which define when actions are appropriate), Arbitration (Prioritize actions based on customer relevance & business priority), and Channels (Activate the channels and triggers that invoke Next-Best-Action).
- Business Structure:** A tree view on the left shows the hierarchy: All issues > All groups > Refinance Mortgage Journey > Welcome & Onboarding > Discover & Apply for a Mortg... > Cross sell > Usage > Services > Collections > Retention > Financial literacy > Sales.
- Customer Journey:** The main workspace shows the 'Refinance Mortgage Journey' with an 'ACTIVE' status. It is divided into four stages: Awareness, Interest, Consideration, and Complete. Each stage contains specific actions:
  - Awareness:** Includes 'Rates are falling' (Email: Interest Rates are Falling) and 'When to refinance your home' (Email: Refinance Mortgage Email Treatment, Refinance Mortgage B Email Treatment; SMS: Home\_ExternalSMSTR...).
  - Interest:** Includes 'First Mortgage 15 year' (Email: Home\_EmailTreatment) and 'Fixed vs Variable rate mortg...' (Web: Fixed vs Variable Rate Mortgages Tile, What's my best interest rate).
  - Consideration:** Includes 'First Mortgage 15 year' (Email: Home\_EmailTreatment) and 'Fixed vs Variable rate mortg...' (Web: Fixed vs Variable Rate Mortgages Tile).
  - Complete:** Includes 'Congrats, your loan is approv...' (Email: Congrats! You're approved).

$$\frac{a_1 + d(n-1)}{2} n$$

# 1 AI Decisioning

# 2 AI Productivity

**PEGA Customer Service**

Thank you Mr. Carver for calling today. Here a wonderful day.

**Case**  
Created: Dec 31, 2024  
Amount: \$500,000  
Probability: 75%  
Assigned to: Pega-Regen-Operat-01-Virginia-At

**Next Best Actions**  
Update/Follow-up on the state opportunity  
Opportunity value: \$500,000.00  
Engagement: 100%

**Details**  
Description: Client generally needs full capabilities for sales and administration in email network to ensure consistency and efficiency. This includes monitoring network performance, managing network traffic, and implementing any issues that arise.

**Competitors**  
MetaCo | network Operations Management | high

**Products**  
Network operations | Network service | \$500,000.00

**Terminates**  
North America | Yes

**Attachments**  
Discovery notes | 1 file  
Request | 1 file  
Send | 1 file

**Prediction**  
Likelihood to close in next stage | 73.785%

**Prediction**  
Likelihood to close in next stage | 62.30%

**Pega GenAI summary**

- Agent Fred started by explaining the process of adding and removing participants from Sara's account.
- He outlined the necessary steps, emphasizing security measures to safeguard her account.
- Sara raised concerns about privacy and control, to which agent Fred assured her of customizable permission settings. He elaborated on the flexibility of these settings, enabling Sara to grant specific access levels to different participants.
- Sara appreciated the clarity and sought clarification on potential risks.
- Agent Fred reassured her, highlighting UPus robust security protocols.

**PEGA Sales Automation**

**Assignments**  
Created: Dec 31, 2024  
Assigned to: Pega-Regen-Operat-01-Virginia-At

**Next Best Actions**  
Update/Follow-up on the state opportunity  
Opportunity value: \$500,000.00  
Engagement: 100%

**Details**  
Description: Client generally needs full capabilities for sales and administration in email network to ensure consistency and efficiency. This includes monitoring network performance, managing network traffic, and implementing any issues that arise.

**Competitors**  
MetaCo | network Operations Management | high

**Products**  
Network operations | Network service | \$500,000.00

**Terminates**  
North America | Yes

**Attachments**  
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**Prediction**  
Likelihood to close in next stage | 73.785%

**Prediction**  
Likelihood to close in next stage | 62.30%

**Pega GenAI Knowledge Buddy**

Suggested: Ask Buddy

Add any question here...

Clear Ask

**PEGA Smart Investigate**

**Request Information**  
Created: Dec 31, 2024  
Assigned to: Pega-Regen-Operat-01-Virginia-At

**Next Best Actions**  
Update/Follow-up on the state opportunity  
Opportunity value: \$500,000.00  
Engagement: 100%

**Details**  
Description: Client generally needs full capabilities for sales and administration in email network to ensure consistency and efficiency. This includes monitoring network performance, managing network traffic, and implementing any issues that arise.

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**Prediction**  
Likelihood to close in next stage | 73.785%

**Prediction**  
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**Pega GenAI Coach**

What help do you require to resolve this payment exception?

What are the involved parties?

What has been done so far to resolve the case?

The involved parties in this payment exception case are:

1. Debt Party (Debtor Bank): AMCO Banking Inc.
2. Credit Party (Creditor Bank): EUKI Grouping Ltd.
3. Debtor: Appard Inc.
4. Creditor: Regen Cotton Ltd.

Based on the history data, the case completed several stages such as Initiation, Enrich data, Check Payment, and Pre-processing. It then moved to the Process exception event stage. There were multiple resolution activities performed, including the generation of Swift correspondence, sending a Swift payment in response to a receipt of debit authorization, and replying to the original claim from the debtor. Then the case was resolved.

Message GenAI Coach

Type a message

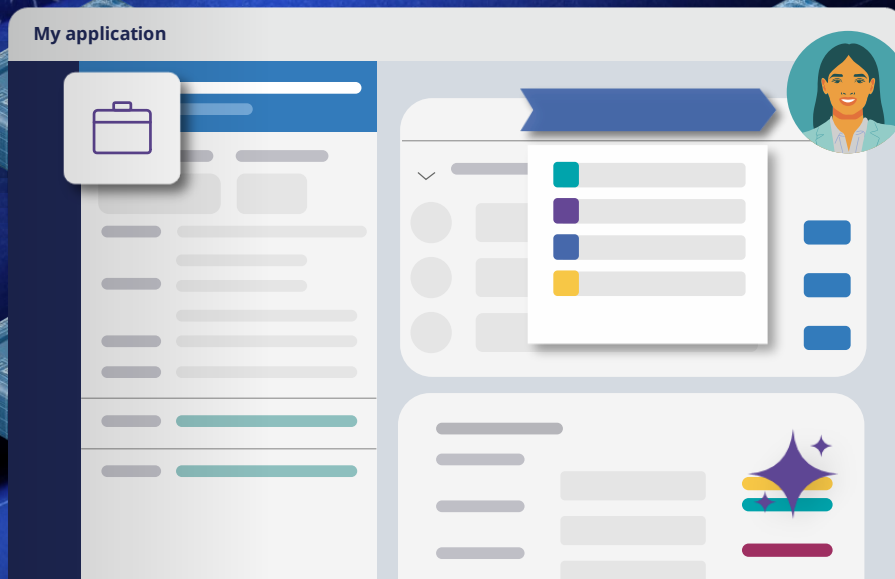
**1 AI Decisioning**

**2 AI Productivity**

**3 AI Transformation**



Pega GenAI ✨  
**Blueprint™**



Pega GenAI ✨

**Blueprint™**







Rethink and replace legacy systems to accelerate Digital Transformation



# Autonomous Enterprise



# Orchestrated Autonomous Agents

Build for Change<sup>®</sup>

