PEGA®

Pega Client Service
for Commercial 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 client focused 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 service experience by dynamically adapting each interaction to support the various specific client segments. Whether you are looking for a solution that offers a full service desktop complete with 360-degree views of the clients or a service case management tool, Pega can meet your needs. Our solution can be deployed as full CRM replacement or, integrated to your current solution to track and resolve customer inquiry requests. We can provide the data, processes and decisioning to help your colleagues service each business, automate or streamline inquiries, and recommend next best actions. You can create a process for one channel and extend that via mashup on the web or mobile devices for self-service and service. Using one application to create a process for all these channels saves you time and money.

- **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 in and across every channel with Pega's omni-channel capabilities. You can also co- browse 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-savvy 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, banks can provide personalized client experiences, increase their colleague productivity, promote higher revenue and facilitate proactive responses to market 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 mashup 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 global entity 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

- SME, Corporate and Transaction Banking assets include; pre-defined and easily configured processes, rules, object and data models, interfaces and other application assets which 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.
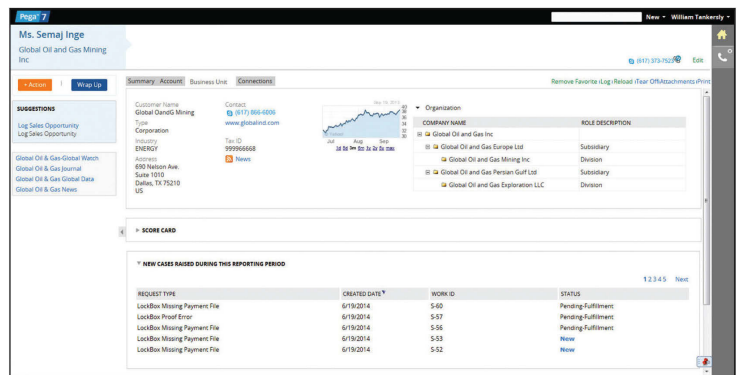
Pega Client Service provides a complete solution for managing all types of client service, enabling service teams to deliver client- focused interactions with optimal efficiency.