



# CRM Evolved

**19. November 2015  
Allianz Arena, München**

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CHANGE®**



# CRM Evolved

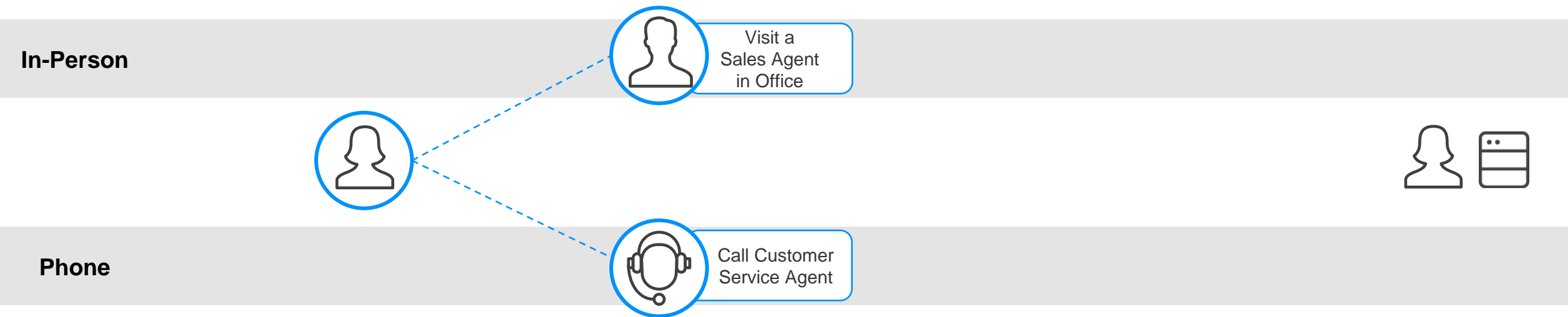
## Applications Engineered for Evolution

**Don Schuerman**

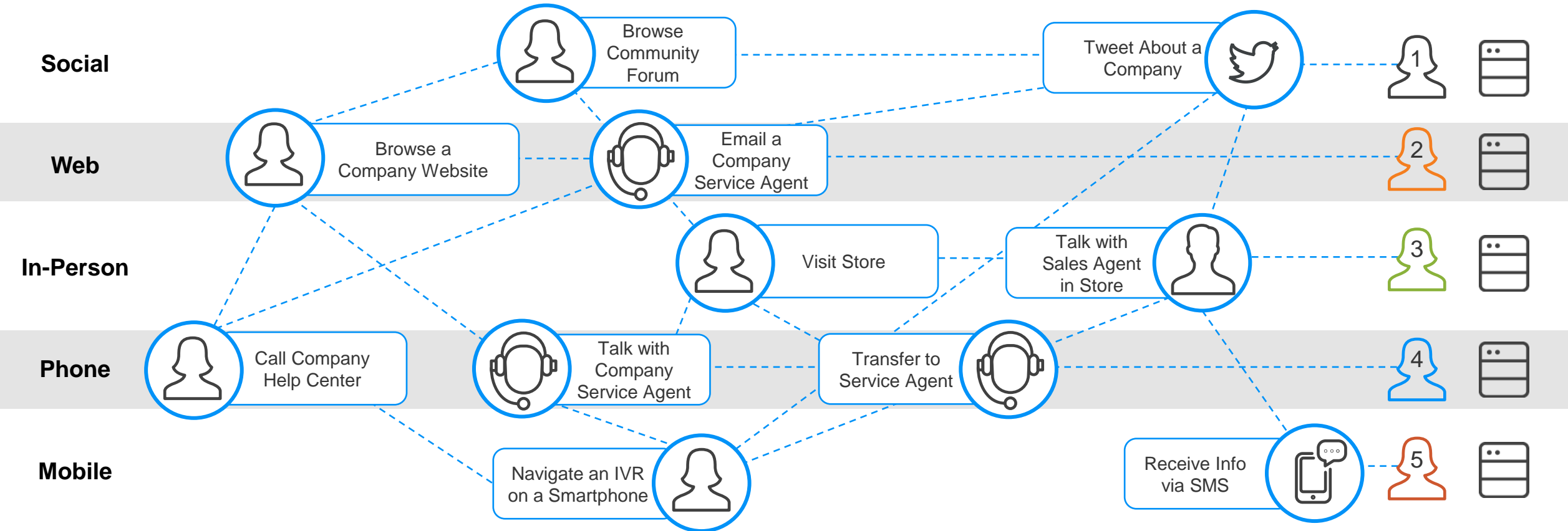
**CTO and VP, Product Marketing**

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# Delivering On Customer Experience Used To Be Easy



# Customer Journeys Are Now Dynamic



Complexity Makes This Hard

Acquisitions

Regulation

Globalization

Product Fracturing

Customer Segmentation

# A History of Customer Records Management



**Mainframe**  
**"Green Screens"**  
*Transactional*



**Web-based CRM**  
*Self-service*



**Client Server CRM**  
*360° View*



**Cloud CRM**  
*Mobile, Social*

# What If You Could...

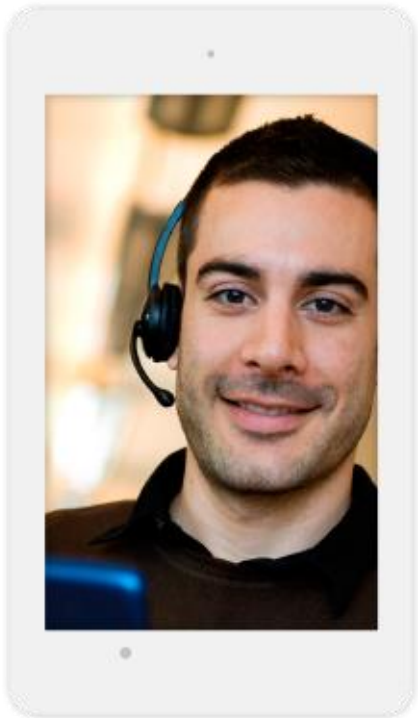
Break down the barriers  
between the front and  
back office

Recognize value in 90 days

Provide a consistent  
customer experience across  
all businesses, channels  
and devices

Rest assured knowing that  
your users will be guided  
by a system that resolves  
issues exactly as you  
would do it yourself





# It's time for CRM Evolved





# What Can CRM Evolved Do?

Manage global  
complexity

Connect customers to  
what matters

Anticipate  
customer needs

Evolve as  
fast as your  
customers



# What Can CRM Evolved Do?

With Unified CRM  
Applications

**COHERENT**

That Seamlessly  
Connect Front and  
Back Office

**SEAMLESS**

In Real-Time

**RELEVANT**

While Treating Every  
Customer Like Your  
First Customer

**IMMEDIATE**





LLOYDS BANKING GROUP



**8 of the Top 10 Credit Card Issuers**

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**8 of the Top 10 Global Banks**

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**6 of the Top 10 Communication Service Providers**

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**10 of the Top 10 Largest Healthcare Payers**

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**7 of the Top 10 Insurance Companies**

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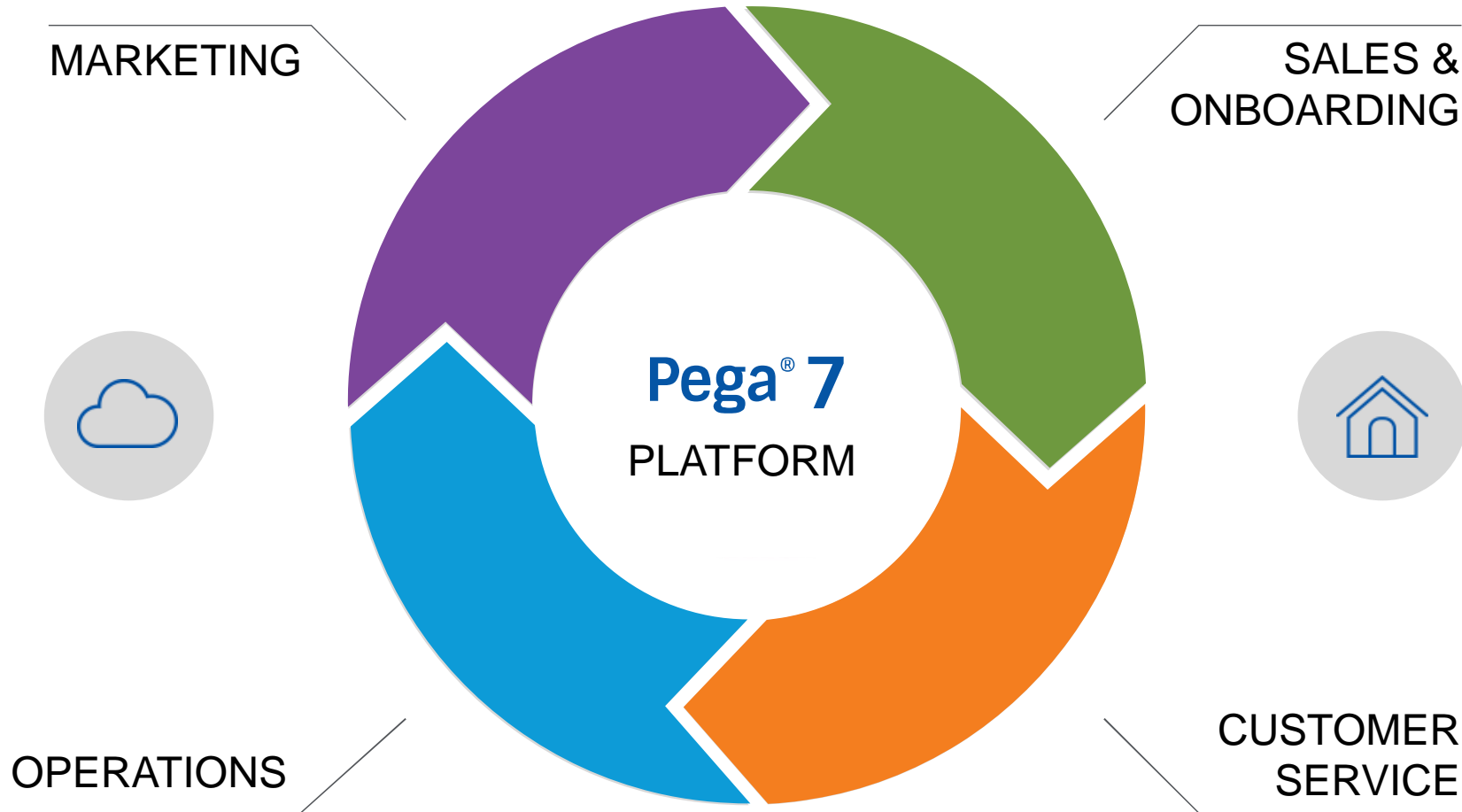
**8 of the Top 10 Life Science Companies**

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**300M Serviced Constituents a Day**

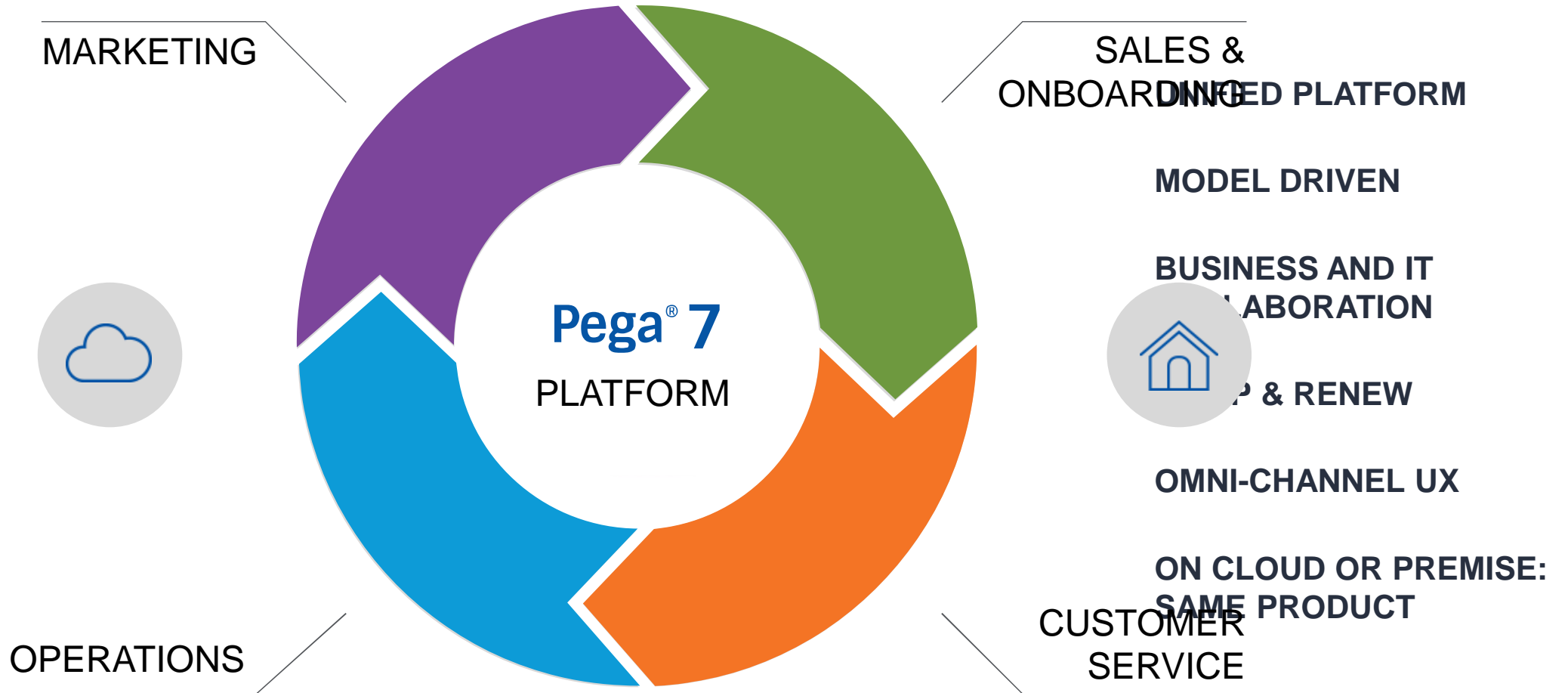
# Applications for CRM Evolved

Driving the end-to-end customer journey



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Driving the end-to-end customer journey



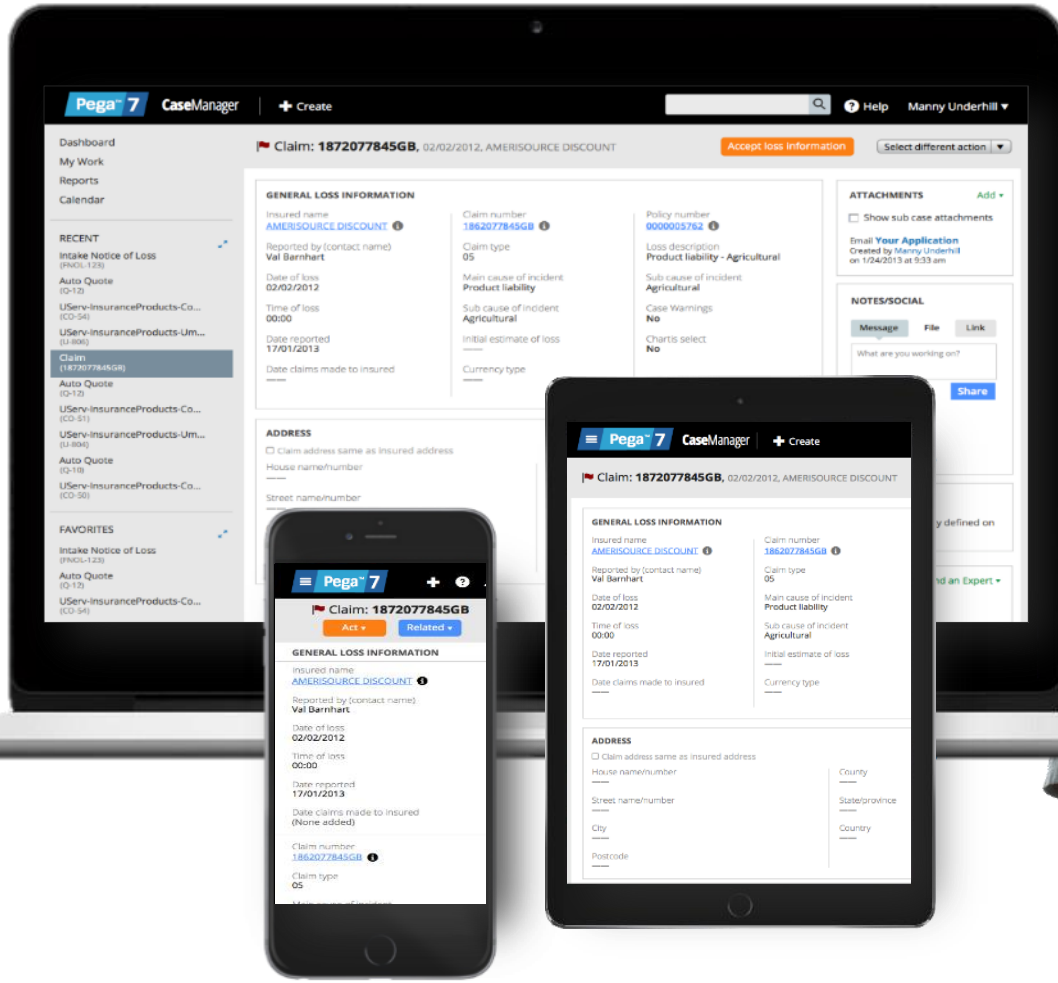
# Connect: Omni-channel User Experience

Deliver coherent user experiences regardless of channel



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Deliver coherent user experiences regardless of channel





# Connect: Case Lifecycle Management

Manage requests from end-to-end

**Job Application For Drew Piekarski (APPID-11)** Save Other actions Close

Collect Resume	Recruiter Review	Interview	Decision	Offer	Accepted
Personal Details ✓	Do Phone Screens ✓	Manager Interview ✓	Background Check	Approve Offer	Launch OnBoarding
Education History ✓	Predictive Index ✓	Review Feedback ⚠	Check Referrals	Submit Offer	
Skills ✓	Myers Briggs PT ✓		Candidate Approval	Negotiate Offer	
Check For Duplicates ✓			Determine Comp	Review Offers	
			Approve Offer		

**FEEDBACK**

Drew Piekarski for Account Executive

Submit Cancel

Overview Information Audit

**CASE CONTENTS**

**RESULT**

What are you working on?

Share: Public Share

All Posts

**Mike Petron**  
Had a good interview with Drew - Take a look at his resume  
June 12, 2014 at 9:40 AM  
[Drew Piekarski-CV PDF \(451 KB\)](#)

**Sarah Lee**  
Thanks for sharing. Kerim should see him too  
Create Case  
June 12, 2014 at 12:12 PM

**Kerim Akgonul**  
I've got this! Thanks Mike & Sarah  
June 12, 2014 at 2:25 PM

**Joe Bowman**  
Now that he passed the background check, we'll move forward quickly!  
June 12, 2014 at 2:12 PM



Case Subjects



Case Data



Case Business Objectives



Rules and Policies



Collaboration



Tasks



Case Content



Sub-Cases



Case Events



Processes and Dependencies

# Pega Disputes and Payment Exceptions for Retail Banking



Optimizing Dispute Management for Credit Card  
Service Excellence

**50% reduction in back office staff**

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*“Any call, any time, anywhere”*

*“If you can get the customer experience right, everything else will fall into place”*

**Adrian Hopkins**

Sr. Manager – Technology, Optimization & Solutions  
TD Phone Channel & Shared Services

# Anticipate: Next-Best-Action

Understand context and anticipate customer needs



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## MAKING THE BEST DECISIONS

RBS uses Pega Marketing to engage customers with relevant offers across all channels improving response rates by 25%

# Evolve: Directly Capture Objectives (DCO)

Deliver applications faster without writing code

CONTINUED



- Familiar business metaphors accessed through a web browser
- Easy forms guide & protect users
- Working models replace paper specs & requirements

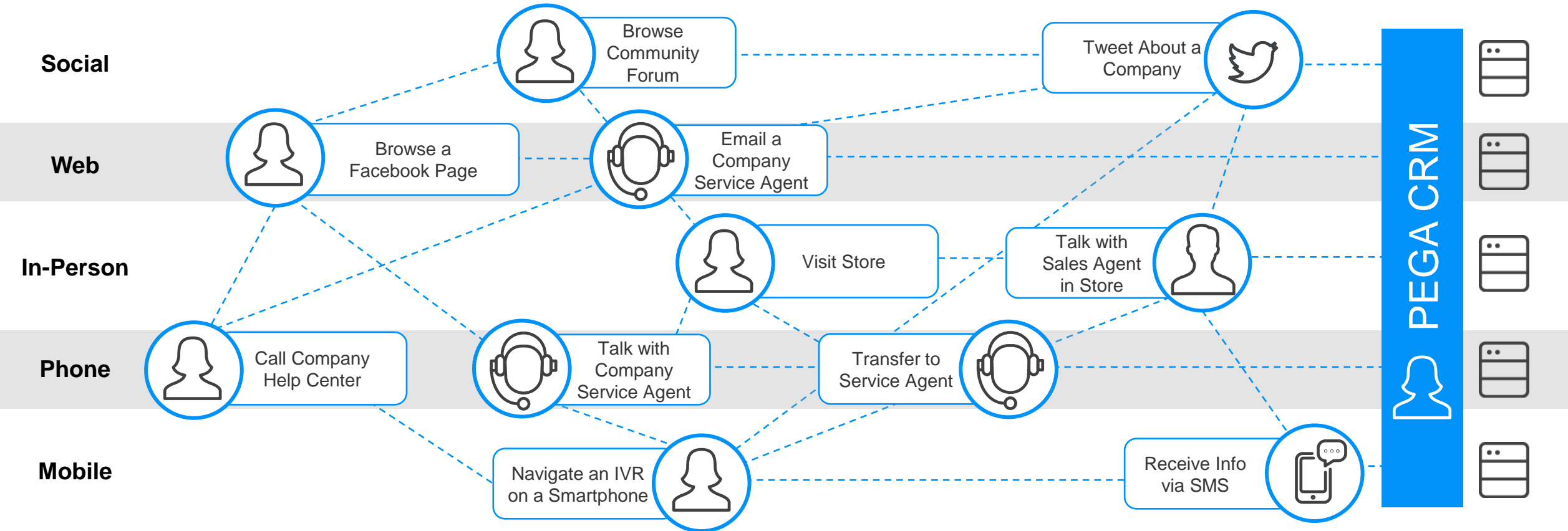


## ENABLING “FAST IT”

Pega is the platform for the Cisco adaptive enterprise.

  
CISCO™

# CRM Evolved for Today's Customer Journeys







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