



# A CRM buyer's Bill of Rights for 2018

Demand a new generation of CRM.  
Be future empowered.

A PEGA EBOOK

Your own empowered customers are changing the way you do business. **So why shouldn't you also be empowered to change the way you work with your technology providers?**

Let's face it: Many vendors stack the deck in their favor, not yours. They lure buyers in with grand dreams, only to later reveal hidden costs and limitations – making it easy to get on board, but incredibly hard and painful to get off.

Indeed, the realities of your implementation, integration, and invoice can turn out to be very different from the glow of the shiny demo that preceded it. CRM buyers like you deal with unforeseen – and ongoing – costs, integration headaches, complex licensing, shelf-ware licenses that never get used, limitations to scalability, and inability to handle complexity. They find themselves locked into proprietary cloud infrastructures with no path out of the cycle of ongoing price hikes. Instead of helping them, their software becomes a ball-and-chain for their business – and their customers.

**To that end, we propose that you deserve a CRM buyer's Bill of Rights.**

# The right to: Real AI

Proven artificial intelligence. No vaporware. No cartoons.

## PEGA'S PERSPECTIVE

Every software vendor talks about AI. Few can actually deliver business value with it. In many cases, there is more hype than reality. Business Insider recently concluded that of the largest recent entrants, despite all its hype, is “still at a very early stage and is a couple years away from becoming a mainstream product for large business users.”

Rather than investing in on-stage cartoons, Pega focuses developing software. Our proven AI is laser-focused on delivering customer engagement. Our real AI touches hundreds of millions of customers doing billions of interactions a day, across more than 100 leading brands. It's AI that is transparent, so you can understand it – and trust it. While some vendors rely on fancy marketing and demos of vaporware that doesn't exist yet, the Pega® Customer Decision Hub application – our unified AI brain – is seamlessly integrated across our CRM suite and has already driven billions of dollars of business value.

You don't need more dreams. And you don't want to be your vendor's guinea pig. You need real product. Real AI. And proven results.

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# The right to: **Real automation**

Demand true end-to-end automation to that can handle all of your complexity.

## **PEGA'S PERSPECTIVE**

Fulfilling real customer demands means getting real work done – across systems and organizational silos. You'll need end-to-end automation capabilities that can simplify the complexities of your existing legacy systems – without ripping and replacing – and get you to the outcomes that your customers, and shareholders, demand.

Unfortunately, most CRM systems can't go the distance with automation. They have limited process management, and treat case management as little more than a “ticket” or simple data type. They claim that they can fully solve your automation challenge – but you will quickly run out of runway. The result is needless manual work, frustrated employees, and customers trapped in complex processes.

To break through, you need best-in-class BPM. Best-in-class robotic automation. Best-in-class case management. And one vendor that can bring it all together.



# The right to: Real cloud choice

Deploy your CRM Solution on the cloud of your choice – not your vendor's. And change your mind at any time.

## **PEGA'S PERSPECTIVE**

Some vendors would have you believe that forcing you to share your cloud environment with other businesses is in your best interest. While their public multi-tenant cloud is a great thing for the vendor's margins, it only introduces risk for you and your customers. Are you ready to duplicate all your data to the cloud? What will be your options when the that vendor's cloud goes down (again) and your CIO demands another alternative? Some vendors will only give you 30 days to remove your data from their cloud when unsubscribing from their offering – really!?

Pega believes the choice of implementation cloud environment should be yours, not your vendor's. And you should be able to change your mind at any time. With Pega, you get the ability to deploy on premise or on a variety of cloud choices – including hybrid. Pega Cloud delivers enterprise-ready services in an environment you don't have to share. You can also choose to run Pega on a public cloud that you manage, your own private cloud, or any combination thereof. And since Pega runs the same code-base everywhere, you can move and manage your applications as you see fit.



# The right to: Real interoperability

You deserve a solution that's truly unified – right from the start.

## PEGA'S PERSPECTIVE

Unfortunately for buyers, every vendor claims their software will all work together. You need to know what's real.. And whether you are starting small or going big, it is important that you have an environment that will be able to address the entire customer journey. This means connecting data and context across sales, service, marketing, and operations, with a single AI and automation engine at the center.

However “Frankenstacks” that are built via acquisition fall down when it comes to data and system interoperability. You end up with different AI engines driving inconsistent experiences. You spend time and money trying to make disparate clouds work together, with no cross-CRM automation. The result? Manual workarounds, expensive integration, and extra licensing costs. You quickly find out that the only thing unified thing you get from these vendors is the invoice.

Pega's solutions are built on a single platform – and single code base – that is pre-integrated, and transparently priced for the enterprise buyer. One AI brain. One automation. One customer engagement system where marketing, sales, and service work together seamlessly. Instead of Frankenstack headaches, you get the ability to address the entire customer journey.



# The right to: Real integration

Insist on a new solution that will integrate easily with all of your existing systems.

## PEGA'S PERSPECTIVE

The cost and complexity of enterprise integration is the second-highest complaint of many CRM implementations. According to a leading independent analyst firm, approximately 1 in 4 companies implementing a popular CRM package will feel the pain of this issue, with 28% citing the high cost of integration and 22% citing the difficulty to integrate with their other applications.<sup>i</sup> In contrast, the same leading analyst rated Pega the highest of any vendor in the category of integration (4.05/5). Compare that to the popular CRM vendor ranked the lowest of any in the study (1.90/5).<sup>ii</sup>

Most CRM vendors want to own – need to own – all of your customer data. Instead of demanding you migrate your data, Pega was built from the ground up to seamlessly integrate across, and with, systems like yours.

**With Pega, you'll never run out of runway when it comes to integration. If you ever find that a particular API integration is not available on the app exchange, such as for that old mainframe you're still sitting on, Pega offers the industry's most feature-rich robotic automation to close the loop.**

# The right to: Real real-time

Your customers move in real, real-time. Now more than ever, your business needs to as well.

## PEGA'S PERSPECTIVE

Real-time interaction management is all the rage. Suddenly every vendor says they are somehow "real-time." The dirty little secret? Under the covers, many systems are still making decisions in batch! Your users are forced to rely upon pre-formed conclusions based upon hours-old, or even days-old, data. Meanwhile, your customer's data – and your customer – has moved on.

Pega believes that you need true real-time interactions in order to move with your constantly changing, channel-switching, instant-gratification-seeking customers. You need to be able to detect and sense their moments of need as they happen, wherever they are. You need to be able to understand customer context in the moment, assembling data from disparate data sources in real time. You need to be able to make decisions in the moment – not from analytic scores that were uploaded in batch before the event even occurred. You need to be able to act on that decision and deliver the outcome immediately. And you need to be able to do it on any – and every – channel.





# The right to: Real journey orchestration

Solve the real customer journey – not just a piece of it.

## PEGA'S PERSPECTIVE

Your customer's journey touches all parts of your organization, from marketing to sales to service and even operational functions. And it's harder than ever to get it right. Customers don't follow rigid paths. They interact at a time and place of their choosing, not yours.

Yet some vendors would have you believe it's just a marketing problem. They slap the word "journey" on an email campaign sequencing tool and hope that you don't look closer. Others imply that as long as you buy their full stack, it will "auto-magically" solve it all.

You know better. And you need better. True journey orchestration is dynamic, fluid, and allows you to visualize and arbitrate the next best action for each customer – across sales, service, marketing, and operations, at the moment of interaction. It's omni-channel. It is channel-less. Only Pega gives you power of truly centralized journey orchestration and case management so you can connect each customer's journey, not only across Pega CRM applications, but also across the other infrastructure you already own.



# The right to: Go code-free

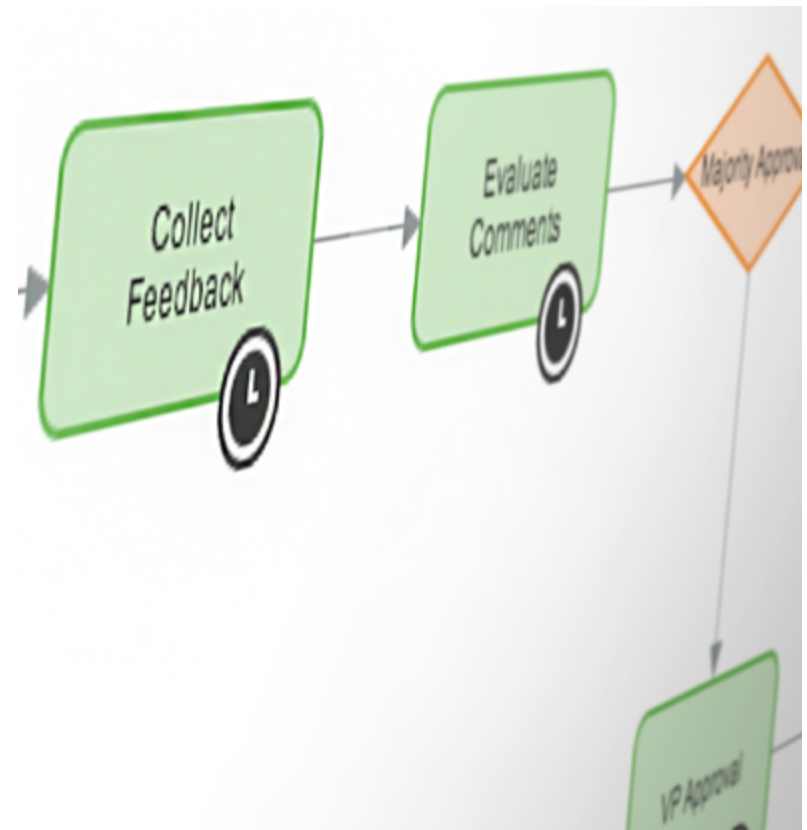
Stop coding. Start designing.

## PEGA'S PERSPECTIVE

Traditional software development – the way you work today – is broken. It's slow. It's expensive. It fails to deliver. This is because most CRM apps still require hundreds of lines of code – often in proprietary languages – to deliver the business outcomes you want.

With Pega, engineers don't "code" apps – business and IT design software together using groundbreaking visual tools. No more requirements docs or spec sheets that nobody ever reads – you capture everything directly in Pega's visual models. Once you design it, Pega automatically generates the software. Tunes the software. Future-proofs the software. And automatically implements that fancy Javascript library your UX expert is rambling on about.

Apps built in Pega go live **6.4x faster** than coded apps. Change in Pega is 8x faster. Your world is changing faster than ever. It's time to change the way you build, deploy, and evolve your software.



# The right to: Cost predictability

Know exactly what you're paying for, now and in the future.

## PEGA'S PERSPECTIVE

Some vendors will often discount heavily when pushed. Of course, they only do this because they know that once clients are on the platform it is difficult to get off. When renewal time comes, they will raise rates to make up for any initial discounts. In fact, independent analysts have uncovered that some CRM customers can expect to pay 11% to 20% more for sales and service cloud offerings when compared to their subscription costs a year ago.<sup>iii</sup>

Additionally, independent researchers uncovered that more than 50% of interviewed popular CRM customers complain about the high cost of ownership over time.<sup>vi</sup>

Pega puts our clients first. Pega is the only vendor that offers "price protection," – a guarantee that the rate will never rise higher than the pace of inflation. How's that for putting our money where our mouth is?

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# The right to: **Ban shelfware**

Demand you pay for the real value you receive.

## **PEGA'S PERSPECTIVE**

Pricing by "named users" only benefits your vendor. With this shady tactic, you're forced to spend full price for individuals that hardly ever use the system. Some CRM vendors will even propose the purchase of extra users for the same price, as a "special deal." The result is shelfware: licenses you pay for that never actually get used. And unfortunately, businesses will often find that when they want to lower their contract and remove users, they are told their discounts only apply to that larger user base... so the costs inevitably stay high.

In contrast, Pega prices your license by the number of active users – or by the amount of work you are putting through the system – so that you only pay for what you are actually using. No more shelfware. No more "gotchas."

**No more shelfware.  
No more "Gotchas".**

# Pega – The real CRM alternative

Pega believes you should be the one who's empowered. Our price protection, active-user-based pricing, cloud choice, extensive capabilities, and ease of integration put your business in the driver's seat – right where you belong – with better technology and a better future.

Be sure to demand your next technology provider abide by this CRM buyer's Bill of Rights to protect your company's interests.

**It's time to get #FutureEmpowered.**





## ABOUT PEGASYSTEMS

We are Pegasystems, the leader in software for customer engagement and operational excellence. Our adaptive, cloud-architected software – built on the unified Pega® Platform – empowers people to rapidly deploy, and easily extend and change applications to meet strategic business needs. Over our 30-year history, we’ve delivered award-winning capabilities in CRM and BPM, powered by advanced artificial intelligence and robotic automation, to help the world’s leading brands achieve breakthrough results.

For more information, please visit us at [WWW.PEGA.COM](http://WWW.PEGA.COM)