



PegaWorldiNspire

JUNE 9-11, 2024 | LAS VEGAS

Generating Value From Every Interaction: Empathetic AI Use Cases with Customer Decision Hub

Client Panel Featuring:
Bank of Ireland & T-Mobile

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Speakers



Jo Allen

Director, GTM
1-1 Customer Engagement
a.k.a. "One to One'der Woman"



Alexandra Andrei

Decisioning Practice Lead



Lisa Kravitz

Senior Manager, AI Strategy



Next Best Action Decisions

Balancing customer and business needs for every interaction, in every channel



Extensive Action Libraries Increase Relevance

Acquisition

Converting
New Customers

Onboard

Activate New
Customers

Nurture

Keeping The Brand
Top of Mind

Grow

Expanding Current
Relationships

Service

Supporting Daily
Customer Needs

Retention

Keeping Valuable
Customers
Profitably

Resilience

Safeguarding Their
Financial State

Cross-Industry Examples

Free iPhone with Trade in	Activate your SIM now and get \$20 cashback	Everything You Need To Know About 5G	Save \$300 When You Upgrade	Get Your Free Device Inspection	Free Unlimited Talk or Text	How To Make Pay Arrangements
Earn 5% the First Year	Read our top tips for getting the most out of your Card	Free Personal Finance Class Available	Go Next Level With The Black Card	Get Real-Time Travel Alerts	Automatic Cash-Back Match	Lower Price Rate Plan
Name Your Price	Download the app to unlock new benefits	The Top 10 Auto Insurance Discounts	Bundle Policies and Save	New Driver? Update Your Coverage	Download, Drive and Save	Suspend Service
\$0 Monthly Medicare Premiums	Choose your notification settings	Finding a New Primary Care Doctor	\$0 Preventative Dental Care	Are You Covered? Check in Seconds	Get Your No-Cost Flu Shot Today	How To Submit An Appeal

Business Issues

Optionality is Key to Arbitration



Customer Action Library

Engagement Policies

Constraints

Arbitration

THE Next Best Action

The right message, paired with the right treatment, delivered at the best time, in the preferred channel



X



X



X



=



ACTIONS

PROPENSITY

CONTEXT
WEIGHTING

BUSINESS
VALUE

BUSINESS
LEVERS

FINAL
PRIORITY

86%

0%

\$203

10%

192.04

71%

0%

\$318

0%

225.78

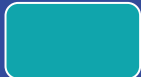
64%

10%

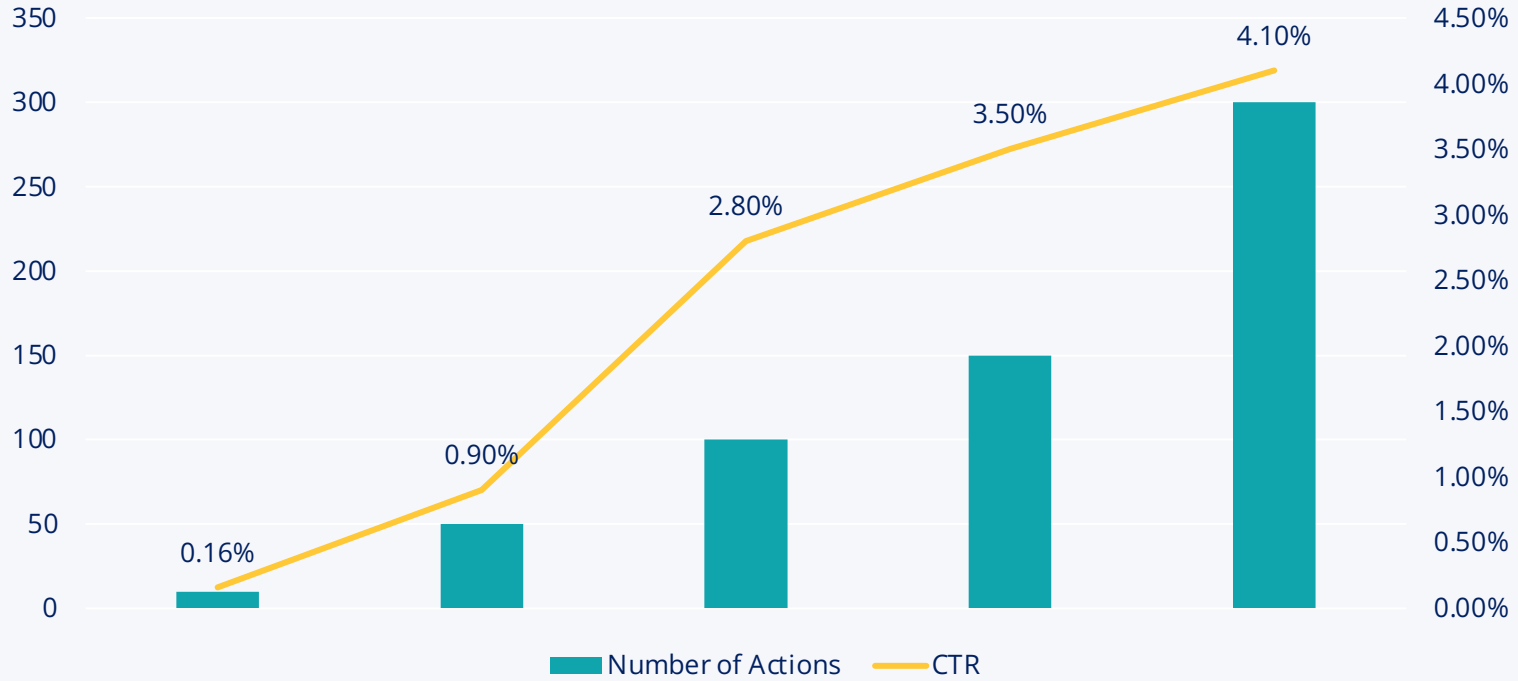
\$137

0%

96.45



Optionality has a Positive Impact on Accept Rates



We Want to Create a Partnership with Our Customers



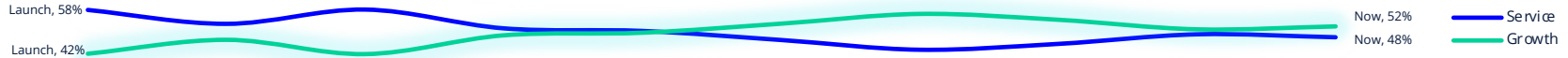
Personal, direct relationship with the bank in the past



Self-serve with little interaction with the bank



Best of both. Self-serve with fast and relevant interaction from the bank



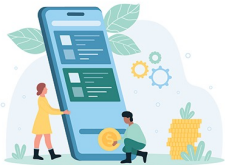
Tax Benefit Finder

Launched in 2022
 >190k engagements in 2022
 >100k engagements in 2023



Fraud NBAs

18 in 2022, additional 26 in 2023
 ~ 15% less calls for Fraud in 2022
 > 1M engagements in 2023



Understanding budgeting

Launched in 2023
 >71% of engagements with the web pages is driven by Customer Engagement Engine



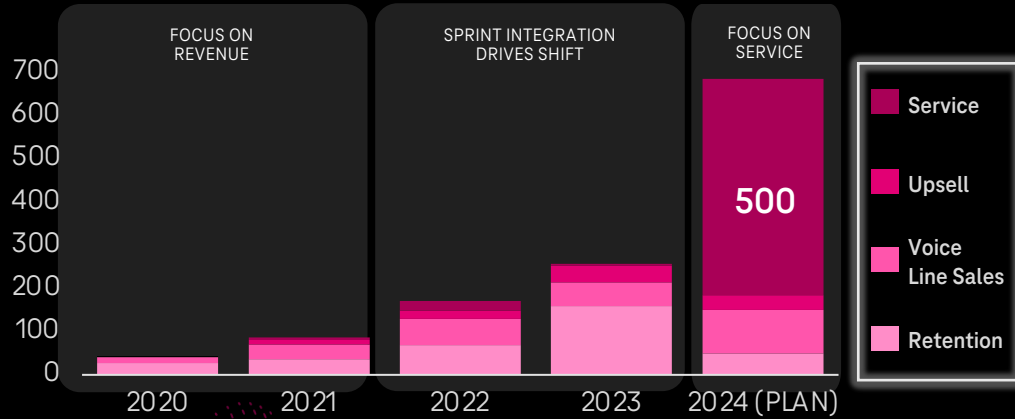
Money worries

Launched in 2023
 >90% of the engagements with the web pages are driven by Customer Engagement Engine

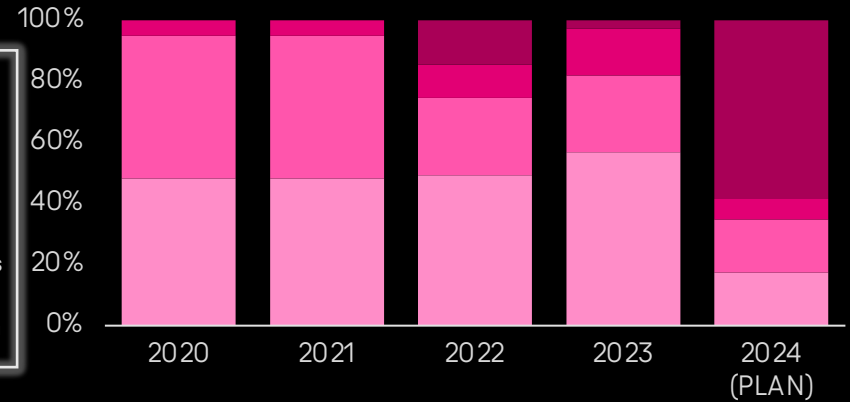
We Want to Reduce Effort Through Service

Leveraging NBA to prevent, automate, & enhance calls to Care

NEWLY CONFIGURED ACTIONS, BY ISSUE OVER TIME



SHARE OF ACTION LIBRARY, BY ISSUE OVER TIME



SERVICE

Action Volume:

+50%

Impact to Calls

driven by NBA presentations:
early, promising

RETENTION

Action Volume:

+140%

Incremental Saves

driven by NBA presentations:
best ever

SALES

Action Volume:

+25%

Incremental Line Sales

driven by NBA presentations:
+13%

PROGRAM

Presentation Rate:

+12% pts

Incremental Revenue

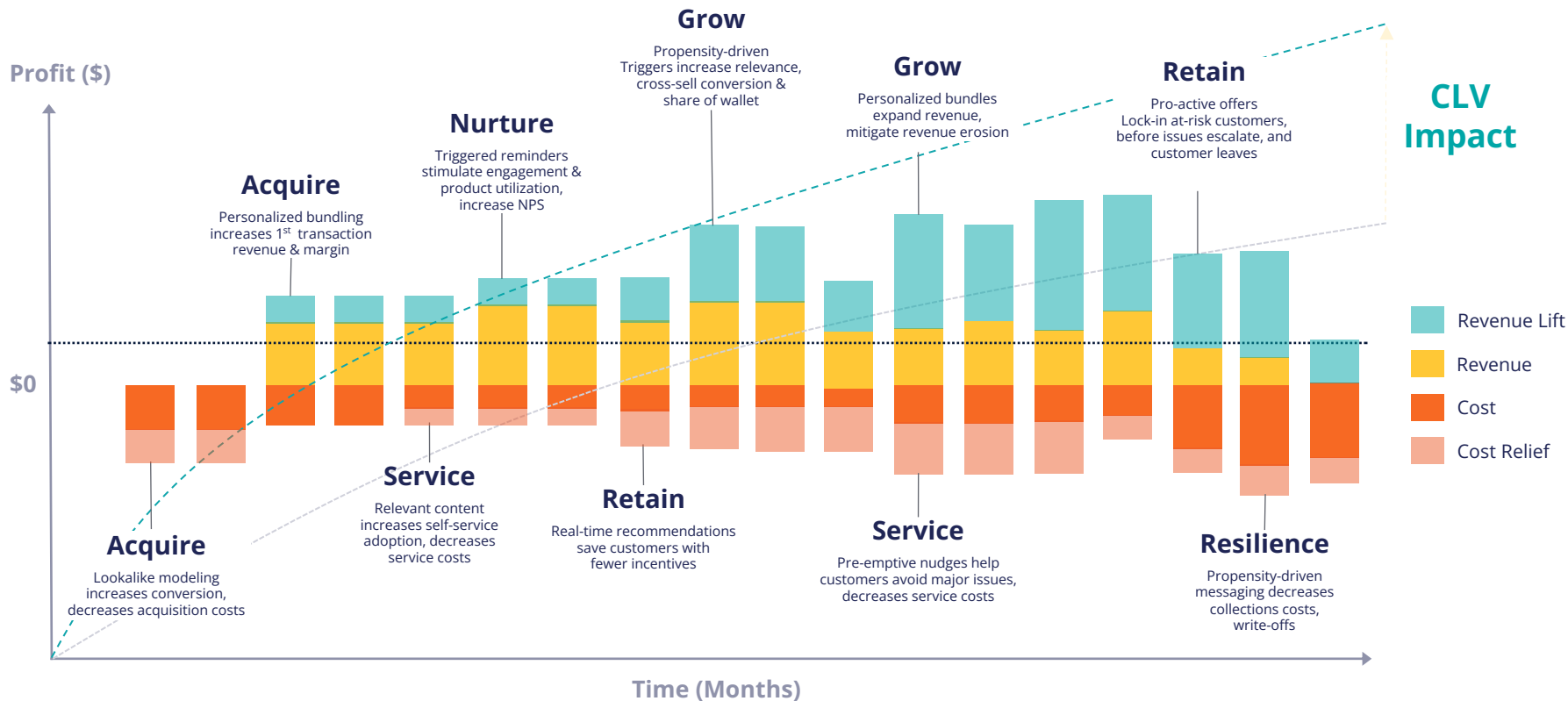
driven by NBA presentations:
+45%

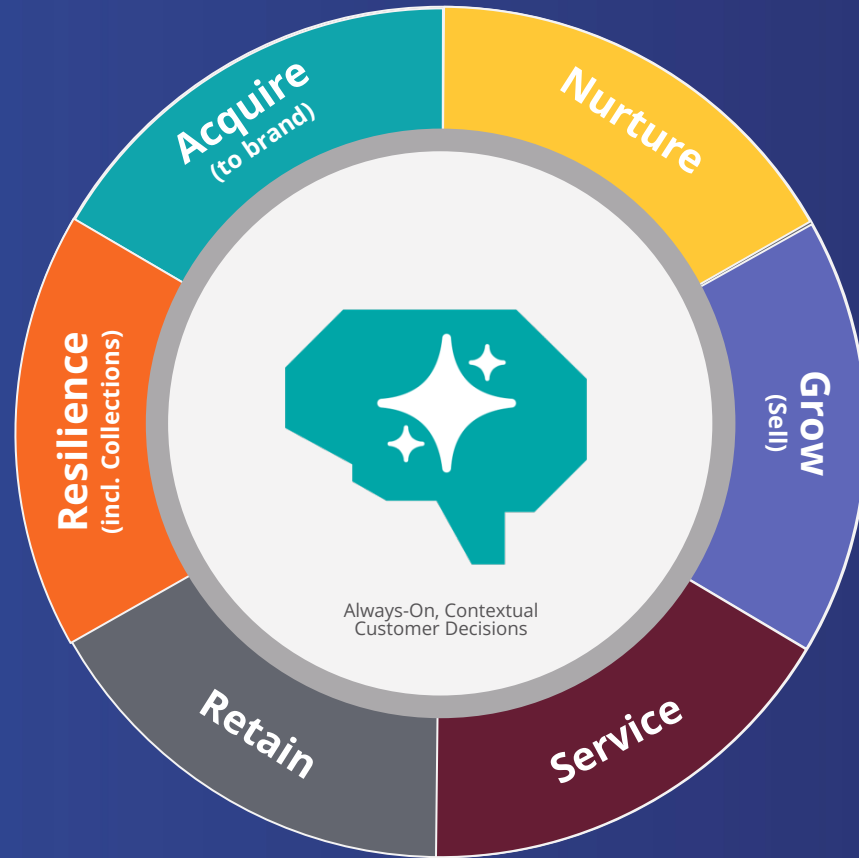
Q1 YoY



The Value in Diversity

Pega is proven to drive value across every interaction







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