



PegaWorldiNspire

JUNE 9-11, 2024 | LAS VEGAS

# Migrate and Modernize with Pega

How to Gain a Competitive Edge





# AI is changing everything.

*“Generative IA has the potential to generate \$2.6 to \$4.4 trillion in value.”*

*McKinsey. “Economic Potential of Generative AI: The Next Productivity Frontier”, June 2023.”*

# Business Transformation

*A Journey-At-A-Time* Modernization Approach



**Business  
Outcomes**



**People  
Focused**



**Operational  
Efficiency**

# How will you put limitless creativity *to work*?



## Do More

Every employee provides  
Amazing Customer  
experiences like your best  
employee



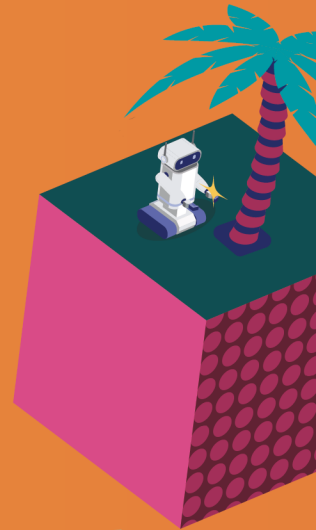
## Build More

Innovation in Days and Weeks  
not Months and Years

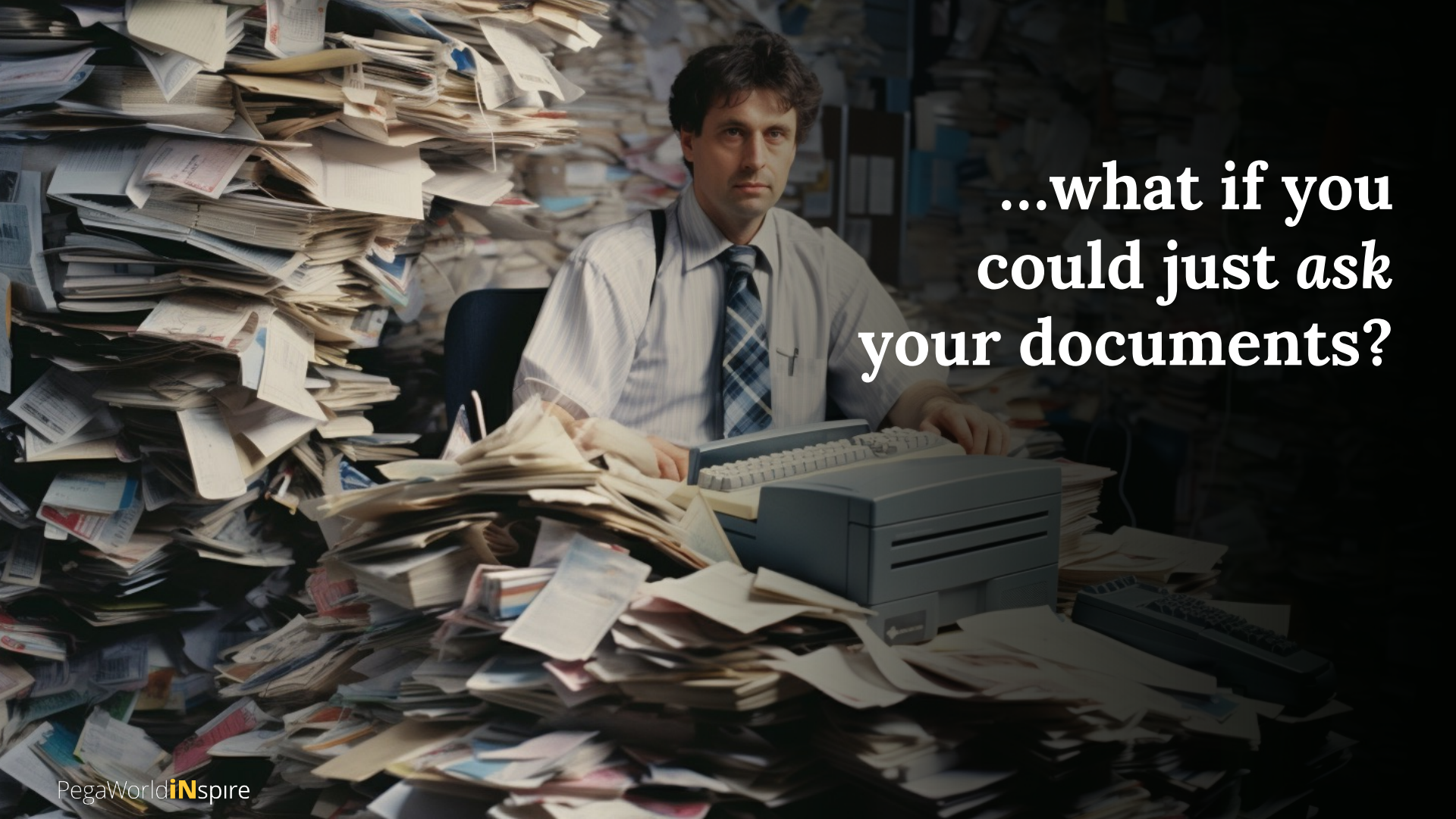


## Innovate More

Free your time to differentiate  
through innovation







**...what if you  
could just *ask*  
your documents?**

A photograph of a middle-aged Black man with a full grey beard and glasses, wearing a blue denim shirt. He is sitting on a windowsill, looking towards the camera with a slight smile. The background shows a window with a view of a cityscape. The text is overlaid on the right side of the image.

**...what if you  
could build apps  
in hours?**





...what if every  
employee could be  
your best employee

# The Future Is Here ....

Clients Innovating Today ...



Personalizing  
Digital Healthcare  
with GenAI

Transforming  
employee  
experience with  
Voice AI

AI Driven Insights  
to overhaul  
Customer Service

Managing  
Sanction Alerts  
with AI

How Optima  
revolutionizes  
BPM Automation  
with AI

# Our Strategy

Migrate and Modernize

**Pega Cloud  
Migration**

**Journey-at-a-Time  
Modernization**



**Autonomous Enterprise**  
to adapt instantly to change

# Cloud Migration Assessment

- Cloud Readiness Tools
- Environment Assessment

## Technical Assessment

- Draft Assessment Report
- Draft Scope Statement, Estimate

## Compile Findings



## Visioning Session

Interviews and workshops to understand organizational strategies and current operating model.

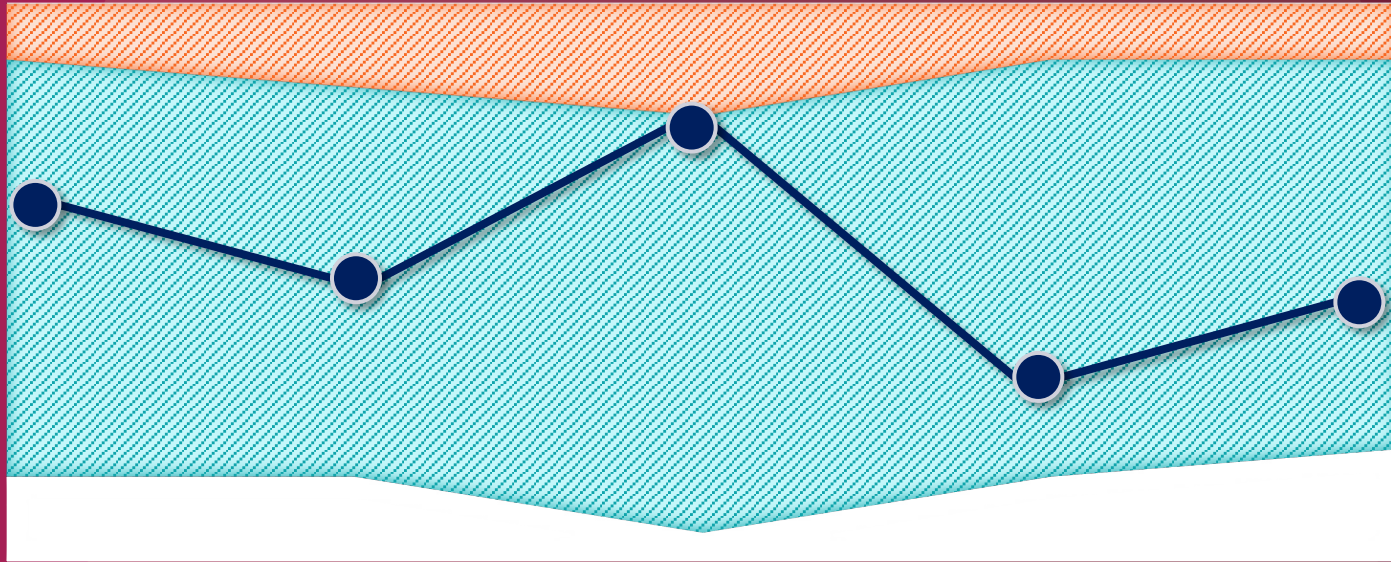
## Functional Assessment

A deeper look at Functional processes tied to technical dependencies such as integrations, process flows etc.

## Proposal

- Review Assessment Report
- Scope Statement
- Estimate

■ Ideal ■ Expected ■ Extreme



INTEGRATION

ACCESS

DATABASE

DEPLOYMENT

PEGA PLATFORM

# Pega-as-a-Service

**65%**

reduction in  
production  
incidents

**47%**

ROI over 3 years

**118MT**

CO<sub>2</sub> e avoided  
annually

**82%**

Able to leverage  
latest innovation





# Modernization – Journey At A Time

Technical Innovation to super charge your Business Outcomes



## Blueprint

Reimagine Journeys



## Co-existence

Reuse Existing Assets



## GenAI

Do More, Build More,  
Envision More



# Go from idea to solution, faster than ever before.

Pega Blueprint™



Start quickly with  
**AI-powered suggestions**



Build out the  
**End-to-end customer journey**



Invite business & IT  
**Collaborators**



Take Blueprint into  
**Instant solution prototype**



Export to present &  
**Share across the enterprise**

**Account Opening**

**Business Needs**

**Case Types and Lifecycles**

**Documentation and Reporting**

**Customer Data Collection and Verification**

**Account Setup and Configuration**

**Live Data**

**Customer Information**

**Account Details**

**Compliance Check Results**

**Welcome Conversation History**

**Document and Report Repository**

**Account Opening Status**

**Mobile App Usage Statistics**

**Persons**

**Risk Factor**

Calculated	Adjusted
00	00
00	00
00	00
00	00
00	00
00	00
00	00
00	00

**Projected risk**

127

**Policy Information**

Policy details	Product
John Doe	DAZNY MP DABR107IN
Ownership	John Doe
Policy summary	Preferred

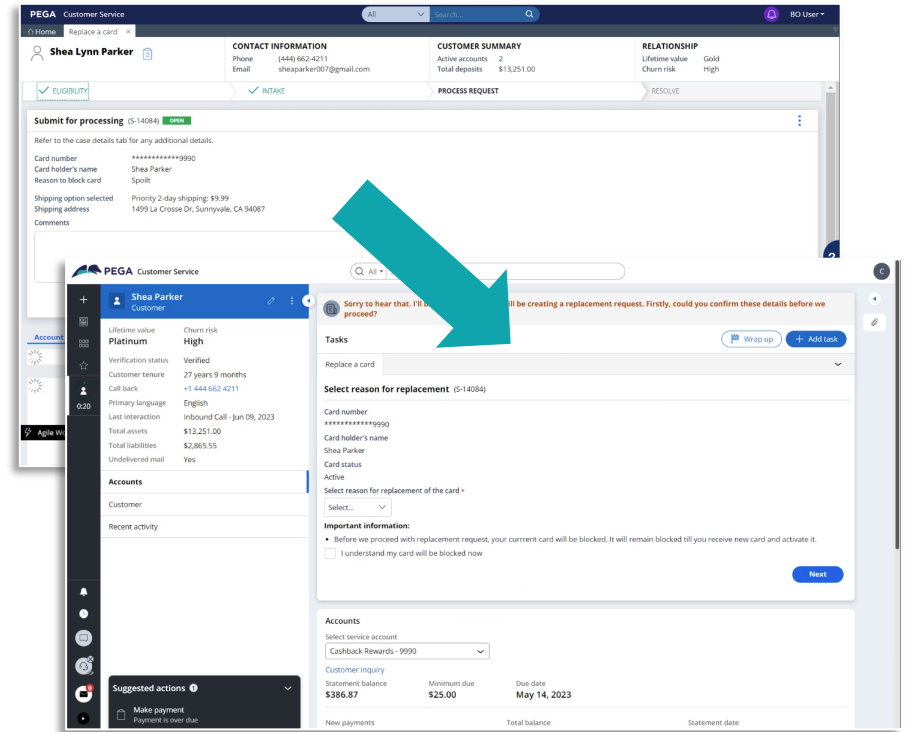
**Parties**

Name	Height
John Doe	6'2 1/2
Parents	170 lbs

Import instantly on your Pega Infinity '23 or 24.1 platform.

# Co-existence with Constellation

- **Co-existence delivers compatibility** between new & existing Pega technologies
  - Reuse existing traditional case types in new Constellation based Customer Service applications
  - Access new Constellation case types within existing traditional Customer Service applications
- **Enables incremental adoption** of Constellation
  - New self-service experiences
  - A new business unit or specialized contact center
  - New business processes and case-types
  - New back-office functions (e.g., fulfillment, approval)
- **Innovate without disruption**



# Do More, Build More, Innovate More

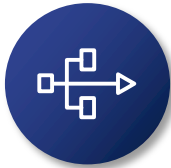
## Pega GenAI™



Discover more

**Pega Blueprint™**

Transform how you build applications



Discover more

**Pega Autopilot™**



Accomplish more

Pega GenAI  
**Coach™**



Answer more

Pega GenAI  
**Knowledge Buddy™**



Understand more

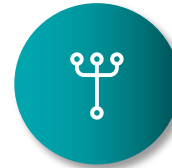
Pega GenAI  
**Analyze™**



Automate more

Pega GenAI  
**Automate™**

Every employee provides amazing customer experiences like your best employee



OnPrem Gen AI

Pega GenAI  
**PremBridge™**

Provide developer flexibility



OnPrem Gen AI

Pega GenAI  
**Connect™**

# Prioritizing Journeys

What is differentiated?

## Pega Infinity 24.1



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**Operational  
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LLOYDS  
BANKING  
GROUP



“Pega has been a fantastic digital transformation partner. It has helped us in our value streams and in our delivery directorates: retail, insurance and wealth, commercial and enterprise.”

**Juan Gomez-Reino**, Chief Technology Officer, Lloyds Banking Group

- *8 applications now hosted on Pega Cloud, 3,000+ users, 90+ integrations*
- *95% of frauds and disputes automatically resolved*
- *Delivering 10+ changes to production per week*
- *Upgrade process reduced from months to hours*





**Rabobank**

“We run on Pega Cloud, and it’s made a huge difference in the speed we can put on the table to take the next step in getting even better in what we’re doing.”

**Finbar Hage**, Executive VP, Digital, Rabobank

- *1.5 billion personalized interactions per year, 4 million interactions per day*
- *4X Increase in click-through rate*
- *98.7% of all interactions are fully digital*
- *Zero downtime with Pega Cloud*







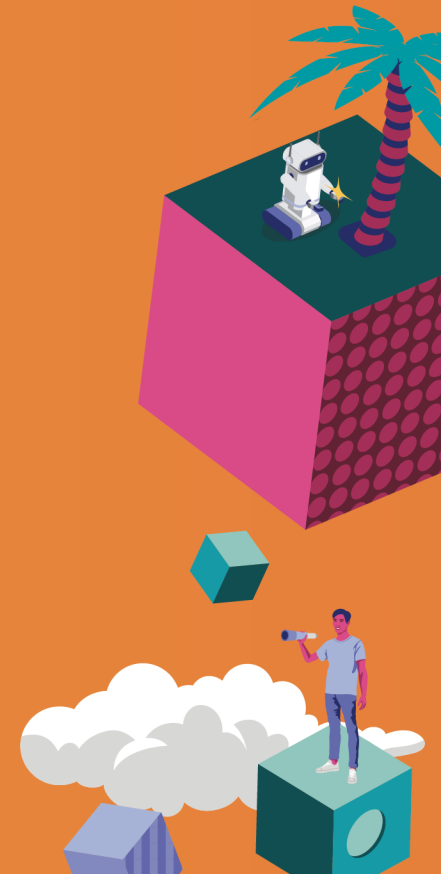
NJ Courts decided to focus their resources on application development efforts rather than maintenance of servers and databases.

This reduces risk to the Courts, while freeing resources to focus on more productive roles.

- *Migrated 20+ applications from on-premise to Pega Cloud*
- *Running 50+ applications on Pega Cloud with additional apps in development*
- *Able to implement and release value-add functionality in 48 hours*



# How can we help?



# Thank You!

Additional Sessions to Learn More

Session Title	Timing	Room
<i>The Sky Was Never the Limit: The Air Force Materiel Command Modernization Journey</i>	June 10, 2024, 2:15PM - 3:00PM PDT	Chairman's Ballroom 365
<i>Lloyds Banking Group: Transforming &amp; Improving Customer &amp; Colleague Experience with Pega Customer Service</i>	June 11, 2024, 1:15PM - 2:00PM PDT	Chairman's Ballroom 355
<i>Cognizant - Rabobank's unique journey to the Cloud</i>	June 11, 2024, 11:30AM - 12:15PM PDT	Chairman's Ballroom 369
<i>Migrate to Pega Cloud and Drive Greater Value from your Pega investment</i>	June 11, 2024, 2:15PM - 3:00PM PDT	Chairman's Ballroom 369
<i>Meetup: Migrating from Client-Managed Pega to Pega Cloud</i>	June 11, 2024, 12:15PM - 2:15PM PDT	Grand Ballroom





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