



# PegaWorld*i*Inspire

JUNE 9-11, 2024 | LAS VEGAS

## Pega 101: An Overview Of Pega's Vision and Technologies

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digital VAX 11/780

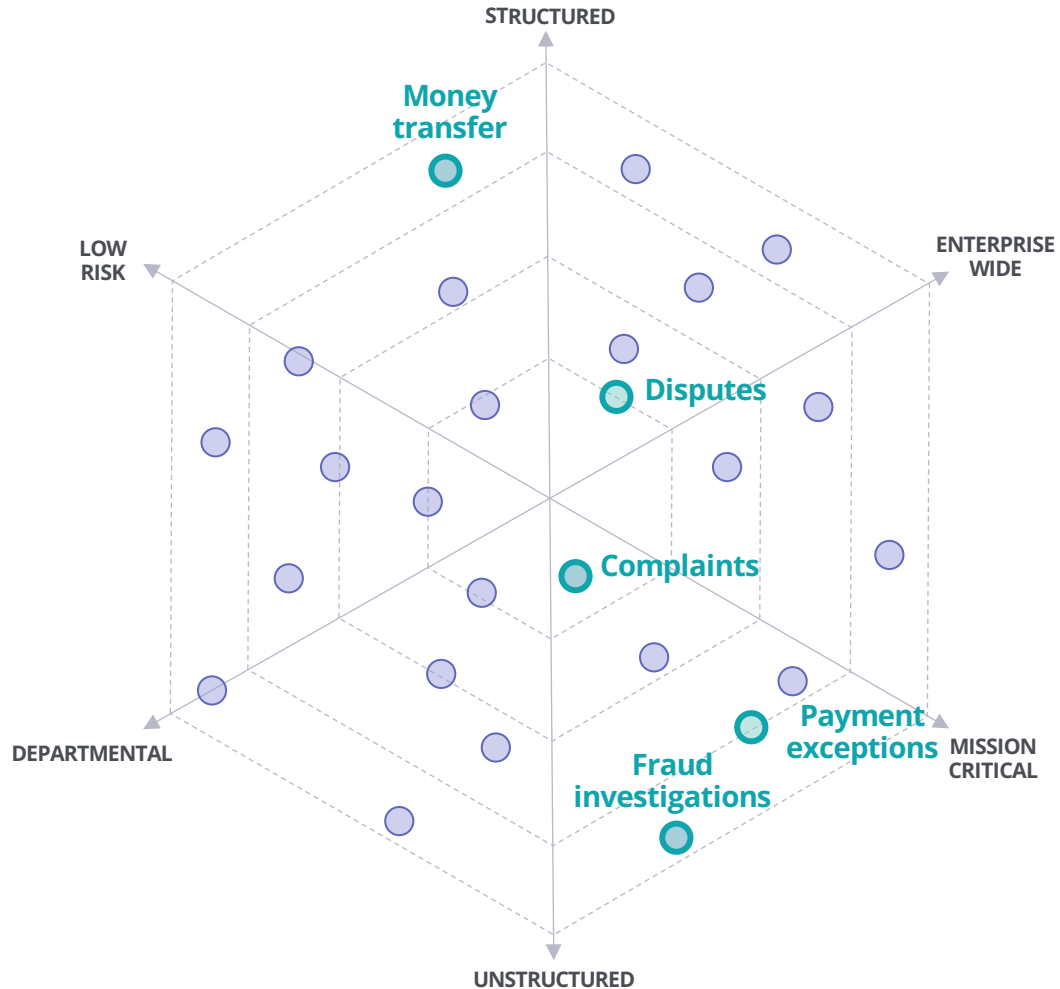
Pegasystems

Case ID	Type	Assignee	Cust ID	Amount	Doc ID	Created	SLA date	Priority
PI-345	Dispute	J. Smith	CUST-789	\$50.00	DOC-987	8/8/2023	9/1/2024	High
PI-23456	Fraud	S. Johnson	CUST-123	\$150.75	DOC-654	8/6/2023	8/9/2023	Medium
PI-34567	Inquiry	M. Brown	CUST-456	\$0.00	DOC-321	8/4/2023	8/7/2023	Low
PI-45678	Dispute	L. Davis	CUST-789	\$200.50	DOC-654	8/2/2023	8/5/2023	Medium
PI-56789	Fraud	R. Wilson	CUST-234	\$0.00	DOC-123	8/8/2023	8/2/2023	High
PI-67890	Inquiry	E. Miller	CUST-567	\$0.00	DOC-789	8/4/2023	8/8/2023	Low
PI-78901	Inquiry	D. Martinez	CUST-123	\$75.25	DOC-456	8/2/2023	8/9/2023	Medium
PI-89012	Inquiry	J. Lee	CUST-789	\$120.00	DOC-987	8/8/2023	8/7/2023	High
PI-90123	Dispute	W. Johnson	CUST-567	\$180.75	DOC-654	8/6/2023	8/5/2023	Medium
PI-1234	Dispute	J. Brown	CUST-234	\$0.00	DOC-321	8/4/2023	8/2/2023	High

-  **Workflow**
-  **SLA**
-  **Routing**
-  **Tracking**
-  **Reporting**
-  **Audit**

 **Payment exceptions**


-  Workflow
-  SLA
-  Routing
-  Tracking
-  Reporting
-  Audit





Hyperpersonalize  
**Customer engagement**



  
**New offer just for you...**

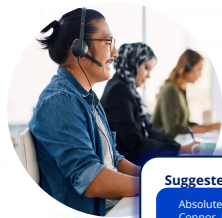
Automate  
**Customer self-service**



**Apply:**

Name
Description
<input type="submit" value="Submit"/>

Guide & accelerate  
**Agent-assisted service**



**Suggested**

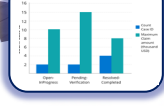
Absolutely Ms. Connor, I'll just need your new address

Streamline  
**Sales operations**




New lead **85% likely to close this quarter**

Transform  
**Operations**







**New offer just for you...**



**Apply:**

Name

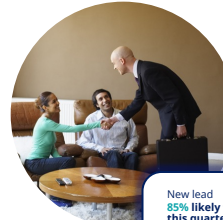
Description

[Submit](#)



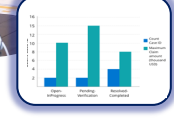
**Suggested**

Absolutely Ms. Connor, I'll just need your new address

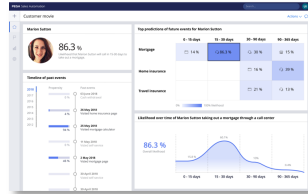


New lead **85%** likely to close this quarter

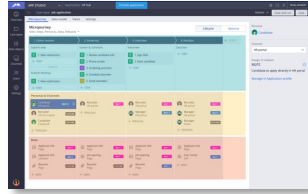
[Schedule meeting](#)



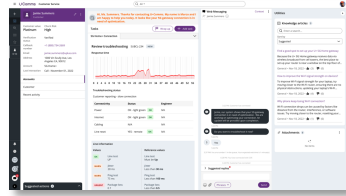
Customer decision hub



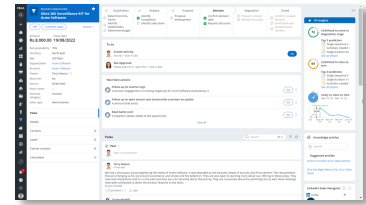
Workflow automation



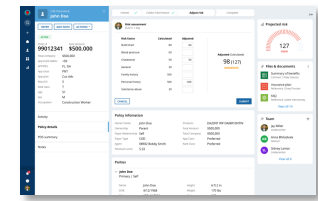
Customer service desktop



Sales Automation



Back-office portal



PEGAInfinity™  
24/7



Multi-channel UX



Workflow automation



AI-powered decisioning



Data & integration

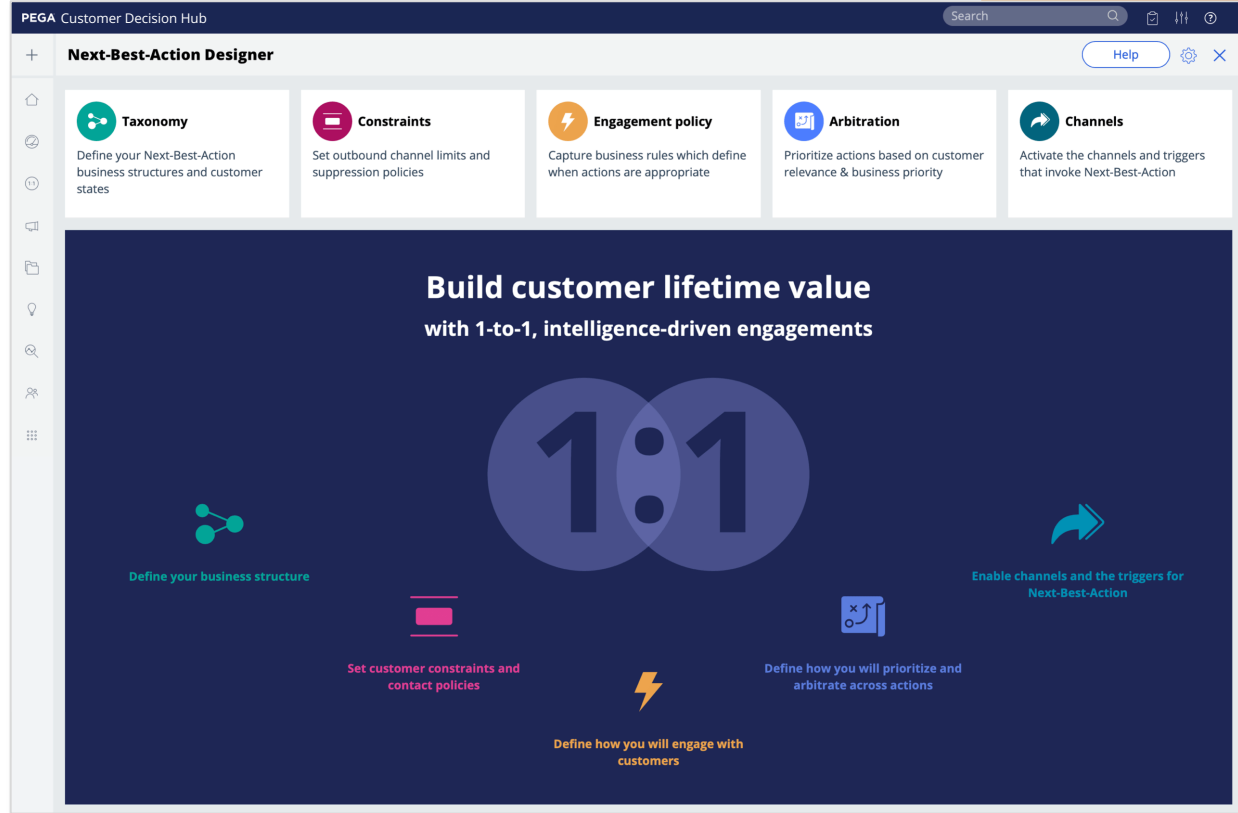


Security



  
New offer just  
for you...

**+\$10 per  
consumer**  
per year revenue  
increase



PEGA Customer Decision Hub

Search

Next-Best-Action Designer

Help

**Taxonomy**  
Define your Next-Best-Action business structures and customer states

**Constraints**  
Set outbound channel limits and suppression policies

**Engagement policy**  
Capture business rules which define when actions are appropriate

**Arbitration**  
Prioritize actions based on customer relevance & business priority

**Channels**  
Activate the channels and triggers that invoke Next-Best-Action

**Build customer lifetime value with 1-to-1, intelligence-driven engagements**

**1:1**

Define your business structure

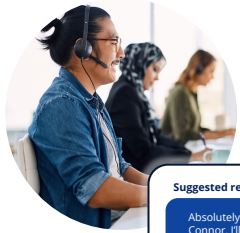
Set customer constraints and contact policies

Define how you will engage with customers

Define how you will prioritize and arbitrate across actions

Enable channels and the triggers for Next-Best-Action





Suggested reply

Absolutely Ms. Connor, I'll just need your new address

Save  
**\$10M+**  
 in call handling time  
 & repeat interactions

UComms Customer Service

Hi, Ms. Summers. Thanks for contacting U+Comms. My name is Marco and I am happy to help you today. It looks like your 5G gateway connection is in need of optimization.

Tasks Wrap up Add task

5G Home+ Connection

Review troubleshooting SUBCL-234 NEW

Response time

Troubleshooting status

Customer reporting - slow connection

Connectivity	Status	Engineer
Power	OK - light green <span>OK</span>	IVA
Internet	OK - light green <span>OK</span>	IVA
Cabling	N/A	IVA
Line reset	YES - remote <span>OK</span>	IVA

Line information

Values	Reference values
<span>OK</span> Line test UP	Line test Must be <b>Up</b>
<span>WARN</span> Jitter 28 ms	Jitter Less than <b>30 ms</b>
<span>WARN</span> Ping test 75 ms	Ping test Less than <b>100 ms</b>
<span>URGENT</span> Package loss 0.7	Package loss Less than <b>0.5</b>

Web Messaging

Jaimie Summers

3:22 PM: Customer has connected

Jaimie, our system shows that your 5G gateway connection is in need of optimization. We are working on optimizing your connection. An update will be provided upon completion.

5:26 PM

Do you want to troubleshoot it now?

5:26 PM

Yes

5:26 PM

5:37 PM: You are number 1 in the queue. Your expected wait time is 1 minutes

6:28 PM: You have connected with CSR

6:28 PM: Customer has connected

Suggested replies

Knowledge articles

Find a good spot to set up your U+ 5G Home gateway

Because the U+ 5G Home gateway receives data via wireless broadcast from cell towers, the best place to set up your router is near a window on the top floor of...

General • Nov 18, 2022 • (3) (0)

How to improve the Wi-Fi signal strength on devices?

To improve Wi-Fi signal strength for your laptop, try moving closer to the Wi-Fi router, ensuring there are no physical obstructions, updating your laptop's Wi-Fi...

General • Nov 18, 2022 • (4) (0)

Why phone keep losing Wi-Fi connection?

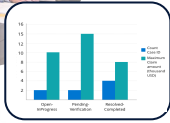
Wi-Fi connection drops can be caused by factors like distance from the router, interference, or software issues. Try moving closer to the router, resetting your...

General • Nov 18, 2022 • (1) (0)

Attachments

No items

Suggested actions



**45%**  
**efficiency**  
**increase**  
across operations

APP STUDIO Application: Insurance claims Preview DEVELOPMENT

Case type: Automotive Actions Save and run Save

Workflow Data model User interface Settings

Case life cycle View: Steps, Personas, Data, Releases (All) Life cycle Optional actions

Step General Flow Goal & deadline

Route to Specific user Reporting manager

Enable approval from  Email  Mobile

Email subject / Push notification message Claim requiring your review

Email content Use existing

Default email approval template

Include attachments

Configure view

Personas & Channels

Claim users Adjuster Repair shop Claim users

Insurance clai... MLP 1 Insurance clai... MLP 1 Insurance clai... MLP 1 Insurance clai... MLP 1

Claims GO MLP 2 Claims bot MLP n Claims GO MLP 2 Claims GO MLP 2

Field agent Insurance clai... MLP 2 Claims GO MLP 1

Repair shop Insurance clai... MLP 1 Claims GO MLP 2

PERSONA PERSONA PERSONA PERSONA

Data & Interfaces

Customer Customer Address Customer

Pega MLP 1 Pega MLP 1 Pega MLP 1 Pega

SYSTEM SYSTEM SYSTEM SYSTEM





**But....  
how does it work?**



# Expectations are rising.



Your customers **expect instant answers** and **fast resolutions**



Your employees **expect to understand** and be able to **do their job**



Your leaders expect you to **optimize, drive agility & do more with less**

# But it can be hard to **meet expectations**



**Disconnected processes**

**No visibility, consistency or tracking**

**Customer friction**

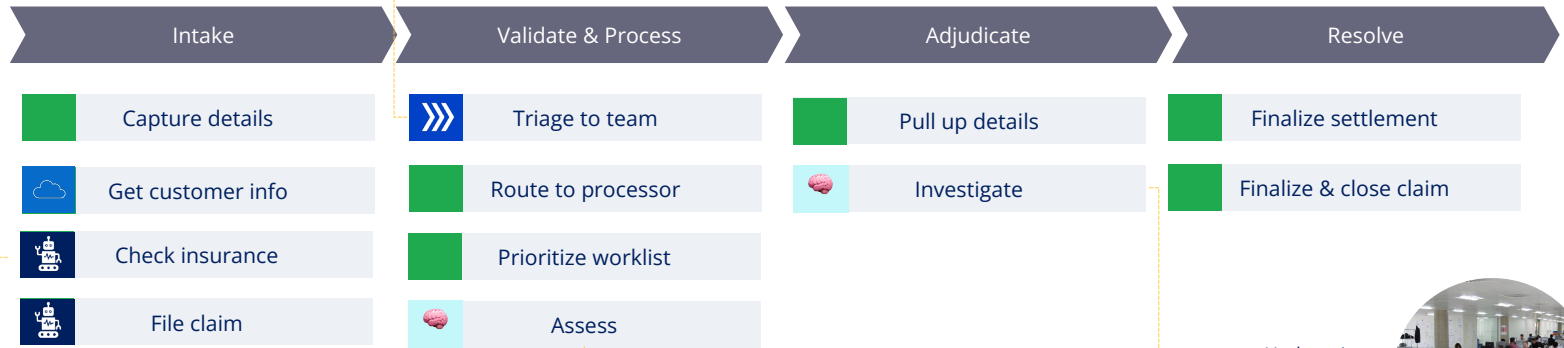
# Automate & eliminate work



Customer



Triage teams



Service rep



Compliance



Underwriters



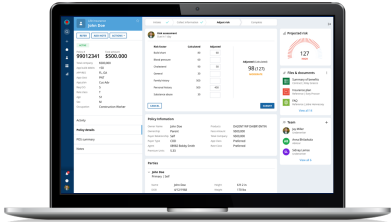
# Transform without disruption



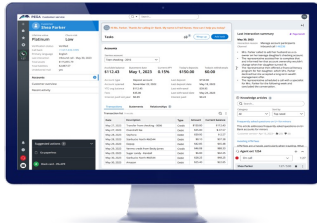
Customer



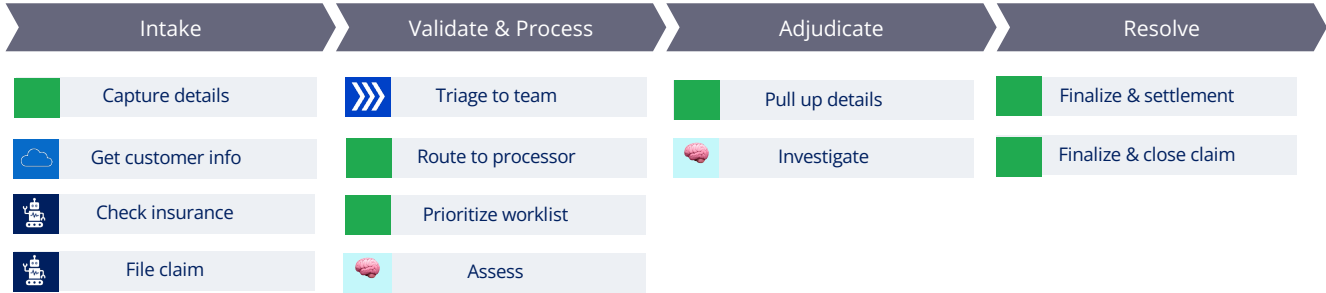
Self service



Contact center



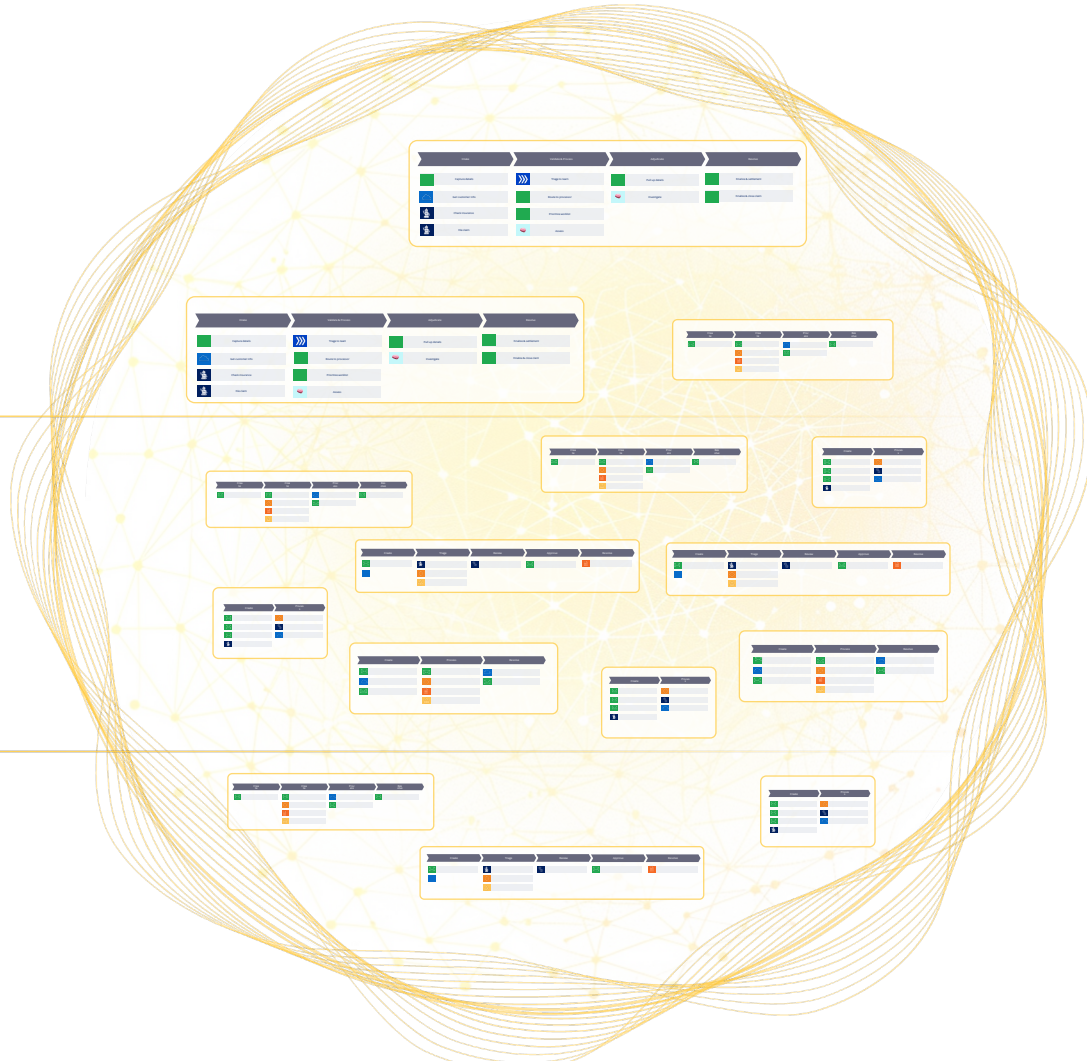
Back office



Managed Work

Transactions

Exceptions



Automate operations  
**at scale**

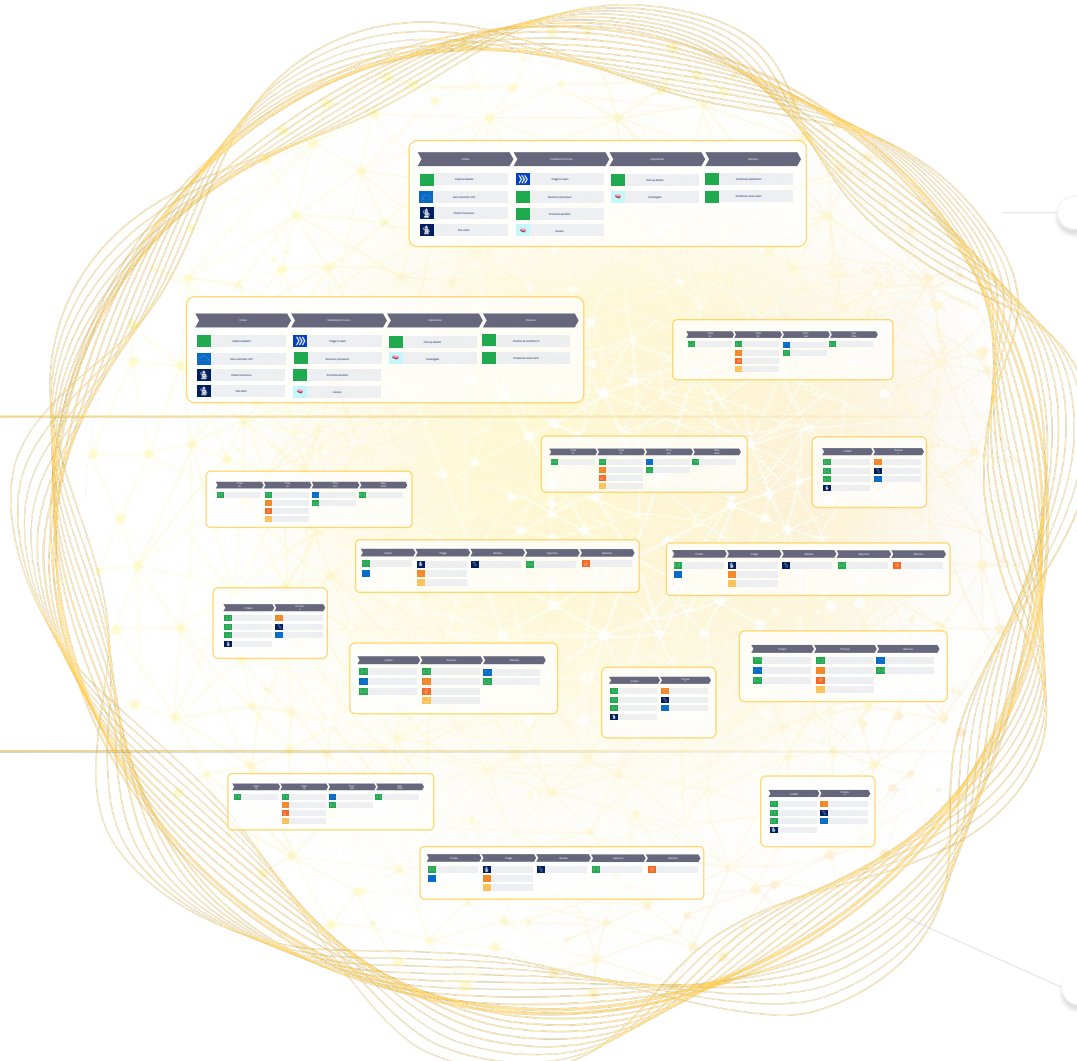
Unified **priority**  
End-to-end **orchestration**  
Complete **visibility**



 Managed Work

 Transactions

 Exceptions



Self service

Simple access to create & check-in on all self-service workflows



Contact center

1080 degree view into all customer interactions



Back office

Single-pane-of-glass for employees & managers

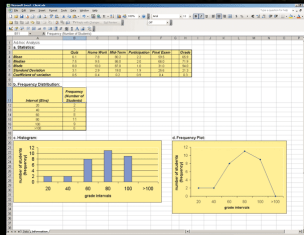
# How do you get started?

Envisioning workflows with Pega GenAI Blueprint™





**Employee  
experience**



A Windows Explorer window displaying a folder structure. The main pane shows a tree view with folders like 'Documents and Settings' and 'My Recent Places'. The right pane shows a list of files and folders, including 'My Recent Places' and 'My Computer'.

A screenshot of the SAP software interface. It displays a data table with columns for 'Material', 'Quantity', and 'Value'. The table contains several rows of data, and there are various navigation and control buttons visible around the table.

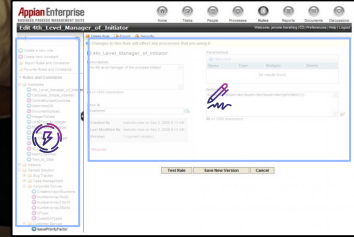
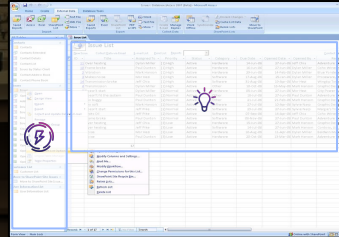
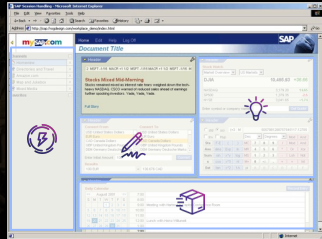
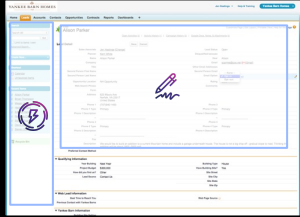
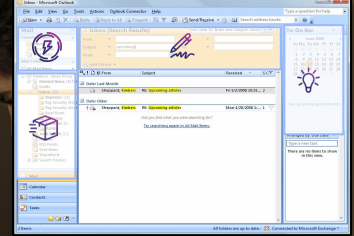
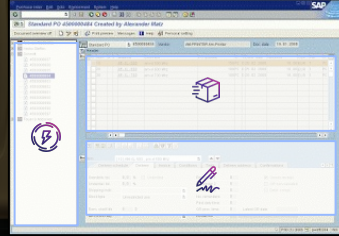
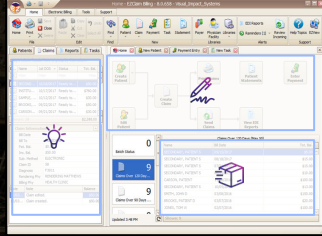
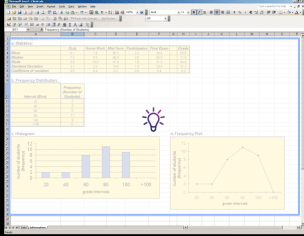
A screenshot of a Microsoft Outlook email interface. It shows an email message with a subject line, sender information, and the main body of the email. The interface includes standard Outlook navigation and toolbars.

A screenshot of the SAP software interface showing a navigation menu. The menu lists various SAP modules and functions, such as 'SAP Home', 'SAP NetWeaver', and 'SAP Business Suite'.

A screenshot of the SAP software interface showing a document title and details. The document title is 'SAP Business Suite' and the details include 'SAP Business Suite' and 'SAP Business Suite'.

A screenshot of the SAP software interface showing a search list. The list contains several rows of data, including 'Material', 'Quantity', and 'Value'. The list is organized in a table format with various columns.

A screenshot of the Applan Enterprise software interface showing a search list. The list contains several rows of data, including 'Material', 'Quantity', and 'Value'. The interface includes a search bar and various navigation controls.



Worklist



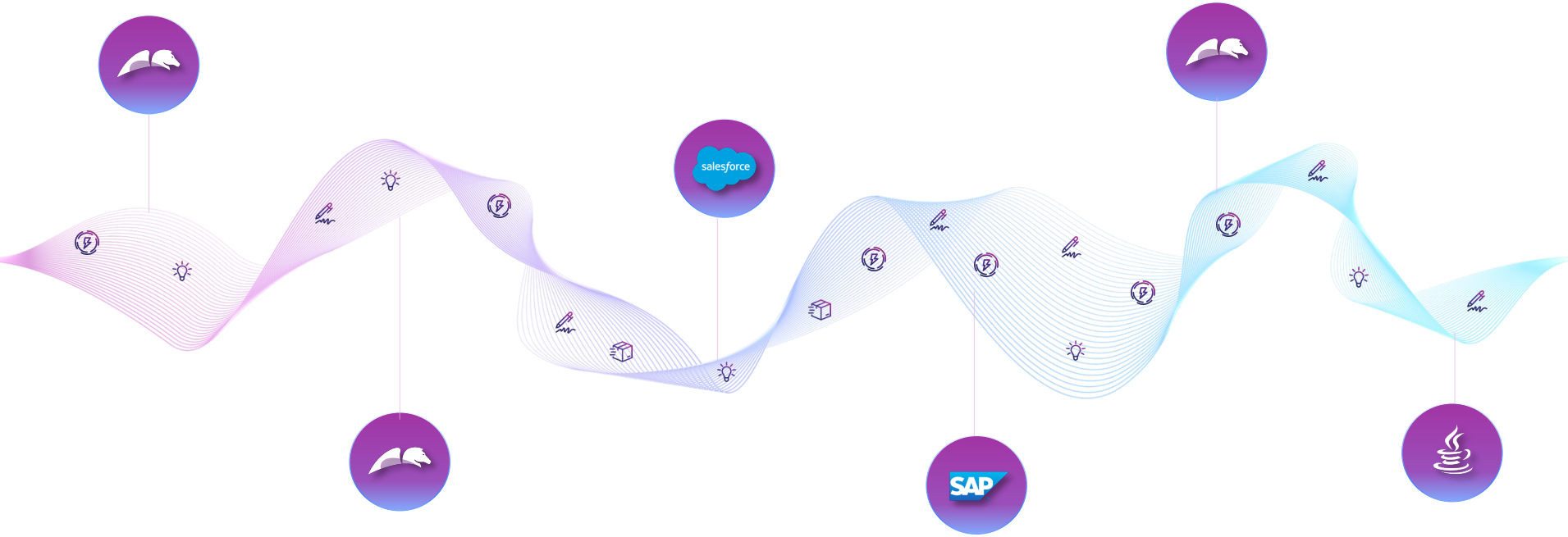
Create work



Do work



Research



Unify all workflows in  
**Process Fabric**

# Simplify.

PEGA

Patient **Elizabeth Peterson**

File insurance claim | Verification | Interaction summary

[Edit](#) Actions

Member ID **M20668491900**

Status **IN PATIENT**

DOB Apr 2, 1991

Age 29

Gender Female

Policy 1 **Medical**

Policy 2 **Dental**

Past medical history  
Osteoporosis, neurogenic bladder, borderline high blood pressure, controlled diabetes, gastroesophageal reflux disease.

Details

**Activity** 2

Past claims 12

**To do**

- Comprehensive metabolic panel order request** Go
- Coverage re-adjustment** Due in 3 days • **Medium priority** Go
- Co-pay re-adjustment** Task in ACCT-2913 • Due in 4 days • **High priority** Go

[View all 5](#)

**Pulse**

Start a conversation

**Sidney Lamas** in SR-680  
2m ago Sent to 24 members

Hey team!

Here's a copy of the verification letter we need. Elizabeth Peterson sent it over on April 17, 2020.

Thanks,  
Sidney Lamas

**Claim verification letter**

Comment 1 Like 3

**Aya Bhiladvala** I agree! I'm going to save! 2m ago

Add a comment

**Files & documents**

- Claim verification letter Contract • Sidney Lamas
- Insurance plan Reference • Evey Prosser
- FAQ Link • Jobie Hennessy

[View all 10](#)

**Team**

- Tadd Miller Consultant
- Aya Bhiladvala Advisor
- Sidney Lamas Agent

[View all 6](#)

**Prediction**

Probability of missing SLA **70.93%**

[Learn more](#)

**Live chat**

Hi Elizabeth, my name is Tadd, I see you have a billing question, is this correct?

Yes, I was able to change my billing date, but I'm not sure how much I'll owe on my next bill.

I'll be happy to clarify, let me share those details with you.

Thanks

Next bill amount **\$130.23**

You know, you're eligible for a payment extension?

Really?

Anything else I can help with?

Phrases ▼

# Simplify.

**PEGA**

**Create work in any system**

- + Investigation
- + Dispute
- + Claim
- + Settlement **SAP**
- + Inquiry
- + Research
- + Compliance report
- + Onboarding

**To do**

- ✓ File insurance claim
- Verification
- Interaction summary

**Comprehensive metabolic panel order request** [Go](#)

**Coverage re-adjustment** Due in 3 days • Medium priority [Go](#)

**Co-pay re-adjustment** Task in ACCT-2913 • Due in 4 days • High priority [Go](#)

[View all 5](#)

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I'll be happy to clarify, let me share those details with you.

Thanks

Next bill amount **\$130.23**

You know, you're eligible for a payment extension?

Really?

Anything else I can help with?

Phrases



# Simplify.

The screenshot displays a patient dashboard for Elizabeth Peterson. The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons for search, home, messages, and a list of items. At the bottom, there are notification and profile icons.
- Header:** Shows the patient's name, "Elizabeth Peterson", and a star icon.
- Member ID:** M20668491900
- Status:** IN PATIENT
- DOB:** Apr 2, 1991
- Age:** 29
- Gender:** Female
- Policy 1:** Medical
- Policy 2:** Dental
- Past medical history:** Osteoporosis, neurogenic bladder, borderline high blood pressure, controlled diabetes, gastroesophageal reflux disease.
- Details:** A section for patient details.
- Activity:** A section with a notification icon (2).
- Past claims:** A section with a notification icon (12).

The main content area is titled "Verification" and "Interaction summary". It features a "To do" list with three items:

- Comprehensive metabolic panel order request** (with a "Go" button)
- Coverage re-adjustment** (Due in 3 days • Medium priority) (with a "Go" button)
- Co-pay re-adjustment** (Task in ACCT-2913 • Due in 4 days • High priority) (with a "Go" button)

A "View all 5" link is located below the "To do" list.

A central callout box contains the text: "Work off a single, prioritized worklist".

Other sections include:

- Files & documents:** List of documents like "Claim verification letter" and "Insurance plan".
- Live chat:** A chat window with messages from a user and a bot, including a question about a billing question and a response about a payment extension.
- Team:** A list of team members including Tadd Miller, Aya Bhiladvala, and Sidney Lamas.
- Prediction:** A section showing a "Probability of missing SLA" of 70.93% with a "Learn more" button.

# Simplify.

**PEGA** Patient **Elizabeth Peterson**

**DATA**

Member ID: **M20668491900**

Status: **IN PATIENT**

DOB: Apr 2, 1991

Age: 29

Gender: Female

Policy 1: Medical

Policy 2: Dental

Past medical history: Osteoporosis, neurogenic bladder, borderline high blood pressure, controlled diabetes, gastroesophageal reflux disease.

**ACTIVITIES**

File insurance claim

Verification

Interaction summary

**To do**

- Comprehensive metabolic panel order request
- Coverage re-adjustment (Due in 3 days • Medium priority)
- Co-pay re-adjustment (Task in ACCT-2913 • Due in 4 days • High priority)

**Pulse**

Start a conversation

Sidney Lamas in SR-680 (2m ago Sent to 24 members)

Hey team!

Here's a copy of the verification letter we Elizabeth Peterson sent it over on April 17, 2024.

Thanks, Sidney Lamas

Claim verification letter

Comment 1 Like 3

Aya Bhiladvala I agree! I'm going to save!

Add a comment

**UTILITIES**

**Files & documents**

- Claim verification letter (Contract • Sidney Lamas)
- Insurance plan (Reference • Evey Prosser)
- FAQ (Link • Jobie Hennessy)

**Live chat**

Hi Elizabeth, my name is Tadd, I see you have a billing question, is this correct?

Yes, I was able to change my billing date, but I'm not sure how much I'll owe on my next bill.

I'll be happy to clarify, let me share those details with you.

Thanks

Next bill amount: **\$130.23**

...you're eligible for a payment extension?

Really?

Anything else I can help with?

**Prediction**

Probability of missing SLA: **70.93%**

Learn more

Intuitive & consistent experience to getting work done  
**Constellation design system**

# Simplify.

The screenshot shows a PEGA patient record for Elizabeth Peterson. The interface includes a left sidebar with navigation icons, a top header with patient details, and a main content area with sections for 'To do', 'Pulse', 'Files & documents', and 'Live chat'. A circular diagram is overlaid on the screenshot, illustrating the AI process flow: **Learn** (magnifying glass icon) -> **Adapt** (flask icon) -> **Automate** (robot icon) -> **Guide** (lightbulb icon) -> **Prioritize** (bar chart icon) -> **Learn**. In the center of this cycle is a blue box titled 'Prediction' with the text 'Probability of missing SLA 70.93%' and a 'Learn more' button.

**PEGA** Patient: **Elizabeth Peterson**

Member ID: **M20668491900**

Status: **IN PATIENT**

DOB: Apr 2, 1991

Age: 29

Gender: Female

Policy 1: Medical

Policy 2: Dental

Past medical history: Osteoporosis, neurogenic bladder, borderline high blood pressure, controlled diabetes, gastroesophageal reflux disease.

Details

Activity: 2

Past claims: 12

**To do**

- Comprehensive metabolic panel order request
- Coverage re-adjustment: Due in 3 days • Medium priority
- Co-pay re-adjustment: Task in ACCT-2913 • Due in 3 days • High priority

**Pulse**

Hey team!

Here's a copy of the verification letter we Elizabeth Peters just sent it over on April 12.

Thanks, Sidney Lamas

Claim verification letter

Comment 1 Like 3

Aya Bhiladva: I agree! I'm going to save!

2m ago

Add a comment

**Files & documents**

- Claim verification letter: Contract • Sidney Lamas
- Insurance plan: Reference • Evey Prosser
- FAQ: Link • Jobie Hennessy

**Team**

- Sidney Lamas: Agent

**Live chat**

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Thanks

Next bill amount: **\$130.23**

You know, you're eligible for a payment extension?

Really?

Anything else I can help with?

Phrases

## Process AI

Always-on predictions which learn from work history

# Simplify.

**PEGA** Patient: **Elizabeth Peterson**

File insurance claim Verification Interaction summary

To do: Comprehensive metabolic panel order request

**Files & documents**

- Claim verification letter Contract • Sidney Lamas
- Insurance plan Reference • Evey Prosser
- FAQ Link • Jobie Hennessy

**Team**

- Tadd Miller Consultant
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I'll be happy to clarify, let me share those details with you.

Thanks

Next bill amount: **\$130.23**

You know, you're eligible for a payment extension?

Really?

Anything else I can help with?

Phrases

**✦ Prediction**

Probability of missing SLA **70.93%**

Avg. is 1.20%

**Top influencing factors**

Factor	Influence
Driver type is Teenage	Increasing
Tenure in years is 1.2	Increasing
Pedestrian involved is true	Increasing
Age of car is 4.0	Increasing
Historical claims is 0.0	Decreasing
Number of cars involved is 2.0	Decreasing

7 total factors

**✦ Prediction**

Probability of missing SLA **70.93%**

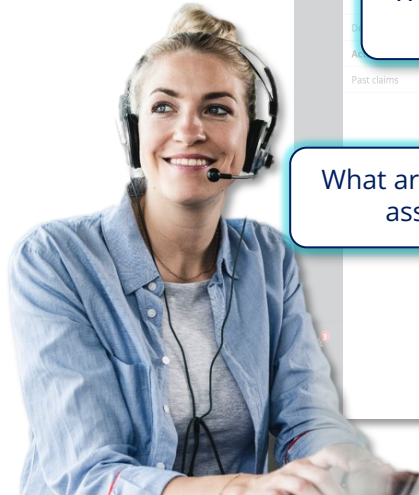
[Learn more](#)

## Process AI

Always-on predictions which learn from work history

# Operations work in a large enterprise can be **complex**

What does an operations employee need to know when they get a new assignment?



What **policies & procedures** do I need to follow?

What's the **history** of this assignment?

What's the **current situation** of this assignment?

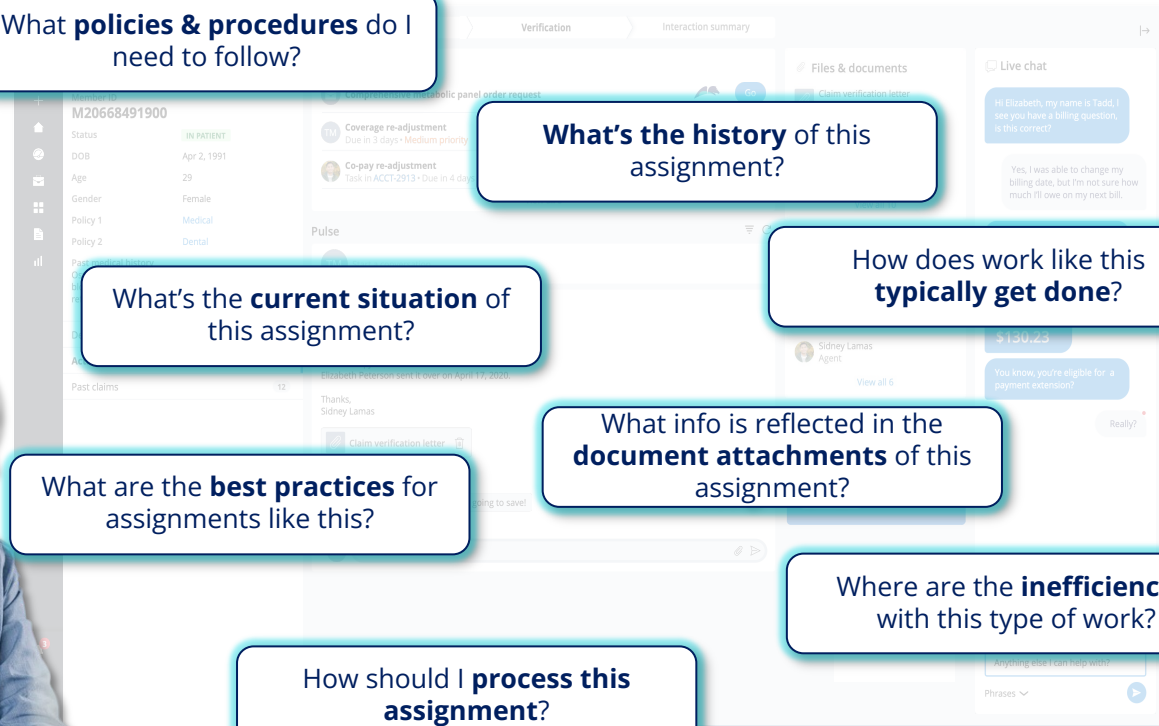
How does work like this **typically get done**?

What are the **best practices** for assignments like this?

What info is reflected in the **document attachments** of this assignment?

Where are the **inefficiencies** with this type of work?

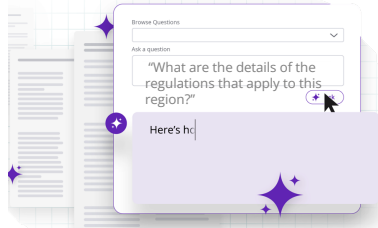
How should I **process this assignment**?



# Make Every Employee Your Best Employee

with Pega GenAI™

## Scale expertise

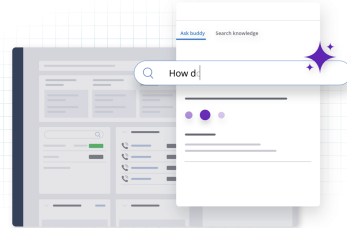


Ask your workflows

### Pega GenAI™ Coach

Scales expertise by directing employees with AI-powered guidance based on your specific best practices & policies.

## Get answers instantly

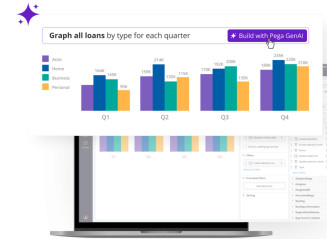


Ask your documents

### Pega GenAI™ Knowledge Buddy

Connects employees with instant answers from disparate data sources via an easy-to-use conversation interface.

## Summarize and simplify

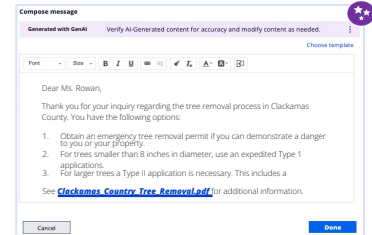


Chat with your data

### Pega GenAI™ Analyze

Turns GenAI-powered conversational prompts into reports that tell a cohesive story and inform high-impact action.

## Get more done faster

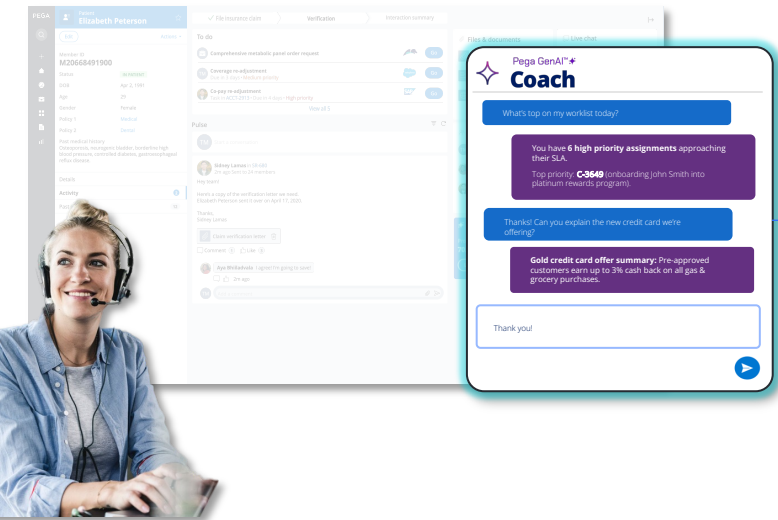


Automate tedious tasks

### Pega GenAI™ Automate

Enhances employee productivity by automating manual work like composing emails and chat messages.

# All these capabilities can be leveraged by Pega GenAI Coach™



Get answers instantly with

Pega GenAI™  
Knowledge Buddy

Gold credit card offer summary  
Pre-approved customers earn up to 3% cash back on all gas & grocery purchases.



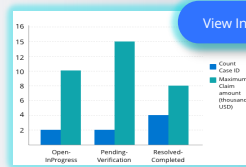
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What **policies & procedures** do I need to follow?

What are the **best practices** for assignments like this?

Summarize and simplify with

Pega GenAI™  
Analyze



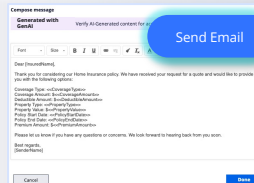
View Insight

“Show me **process** sorted by type”

“What is the **average interest rate** of each loan?”

Get more done faster with

Pega GenAI™  
Automate



Send Email

Let GenAI **draft emails and messages**



[www.pega.com/blueprintc](http://www.pega.com/blueprintc)

Envision your next app, today.

## Pega GenAI Blueprint™

Optimize workflow design,  
fast, with the power of  
Pega GenAI™.







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