

Welcome



Kat Austin
Product Marketing Manager



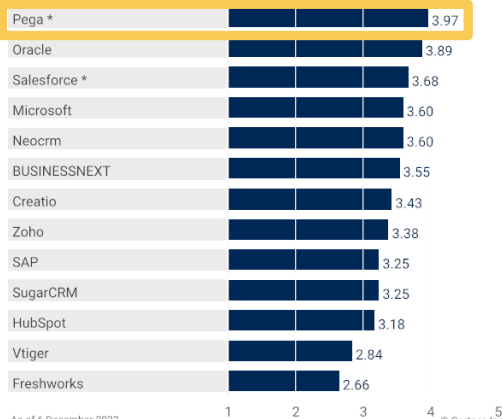
Frank Martin
Senior Director of Product Management



Pega Sales Automation: Top Solution across B2C, B2B, & Indirect Selling

B2C Use-Case

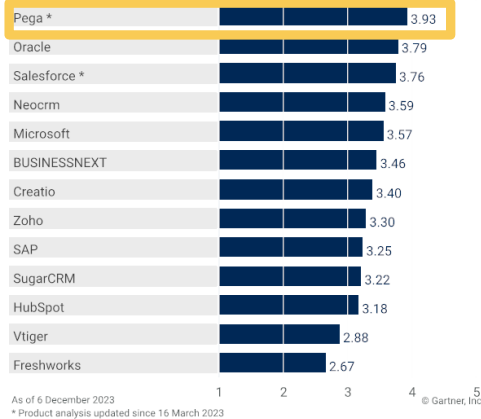
Product or Service Scores for B2C Sales



As of 6 December 2023
* Product analysis updated since 16 March 2023
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B2B Use-Case

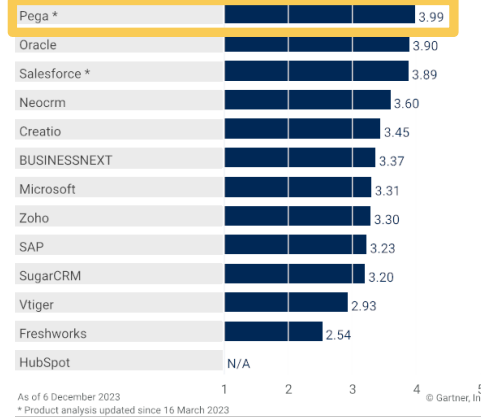
Product or Service Scores for B2B Sales



As of 6 December 2023
* Product analysis updated since 16 March 2023
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Indirect Use-Case

Product or Service Scores for Indirect/Relationship Sales



As of 6 December 2023
* Product analysis updated since 16 March 2023
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Top Solution for 3 Years

Gartner



Four Years Ago.....

Before 2020



2020 – Now and Beyond

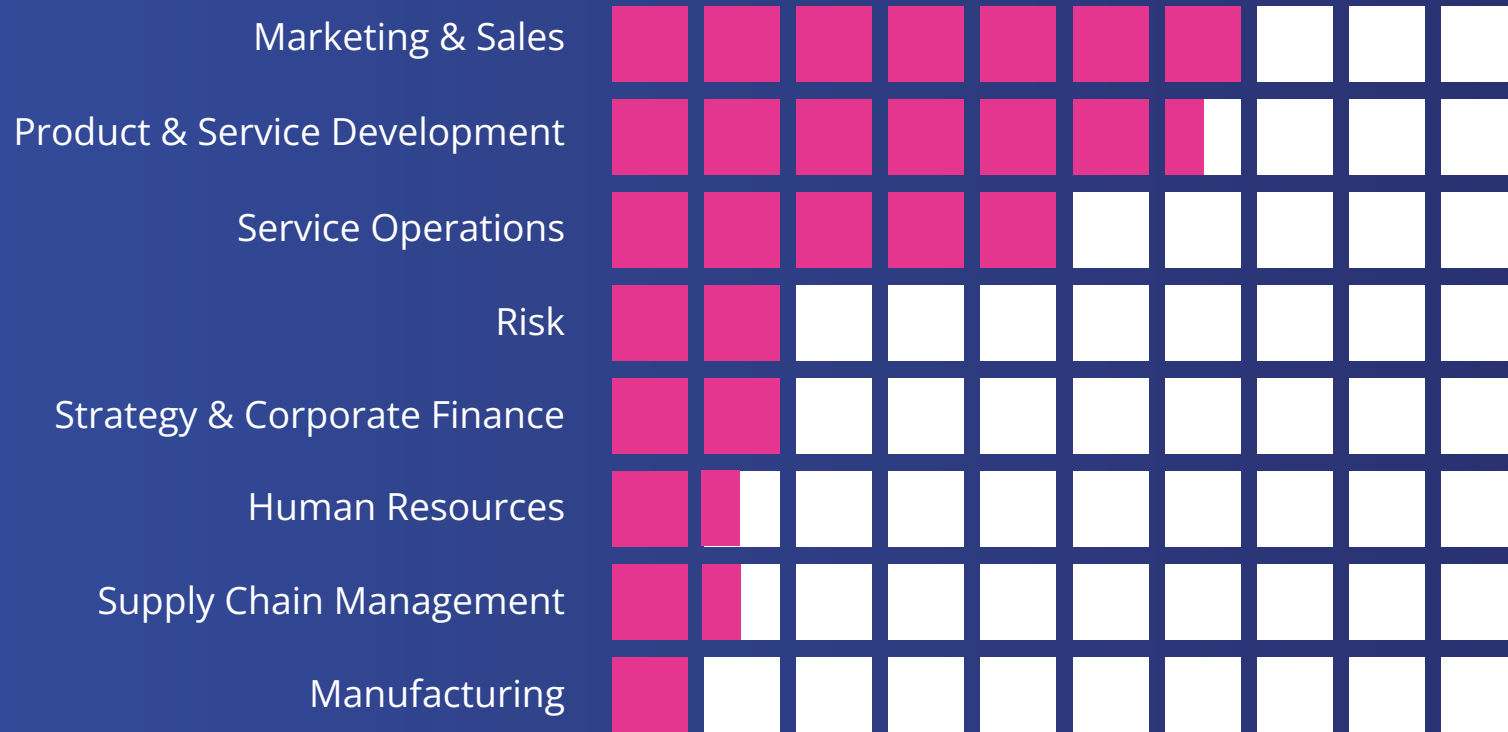


**The Outcome:
Digital Selling Isn't Going Anywhere.**



GENERATIVE
AI

Most Identified Use Cases for AI investment



1. McKinsey, The state of AI in 2023: Generative AI's breakout year, Aug 1, 2023

The Challenge?

Traditional SFA wasn't built for today





How can we make simplifying sales real?



What If You Could Make Every Seller Your Best Seller?

Always Know The Next Best Step to Take

Immediately Understand The Context of an Opportunity

Make Every Sales Interaction Meaningful

Instantly Unlock Answers Trapped Within Webpages and PDFs

Quickly Adapt to Product, Regulatory, and Market Changes

Anticipate Customer Needs



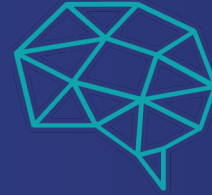
Core Components for Making Every Seller Your Best Seller

**Workflow
Automation**

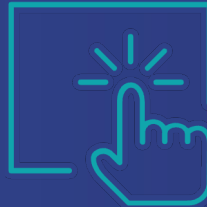


+

**AI-Powered
Decisioning**



**Unified
Platform**



Pega Sales Automation

Smart selling made simpler

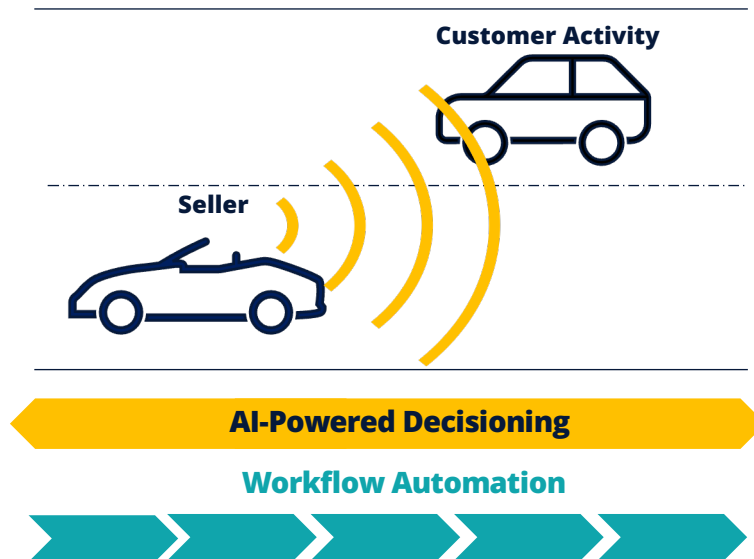
Automate and Simplify Complex Sales Processes:

Increase Sales Velocity

Focus on the leads, activities, relationships and opportunities that are **most likely to convert/close**

Optimize Seller Productivity

Anticipate customer needs, eliminate selling blind spots and guide sellers from end-to-end



Simplified 7 policy
admin systems



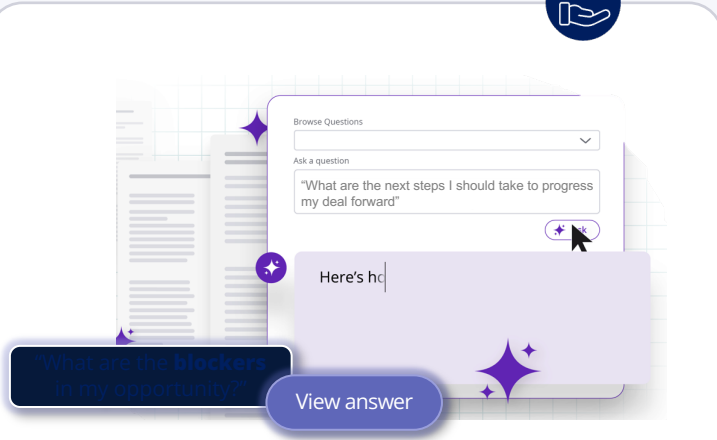
Deployed Pega
in just 12 weeks



50% increase in
sales efficiency

Increase Sales Velocity

Scale Expertise

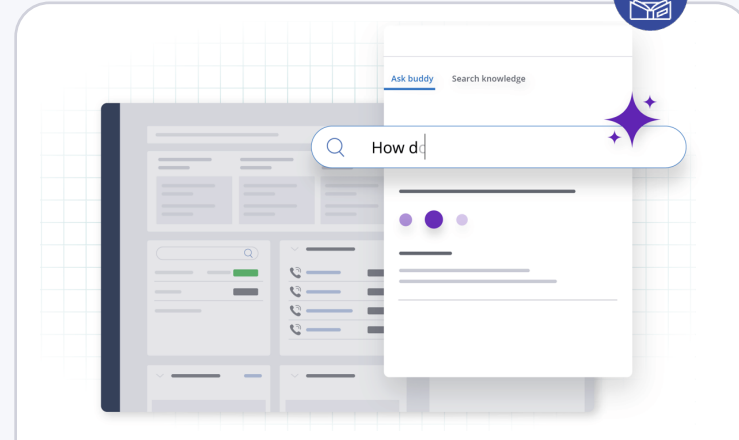


Ask Your Workflows

Pega GenAI Coach™

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

Gain Instant Knowledge



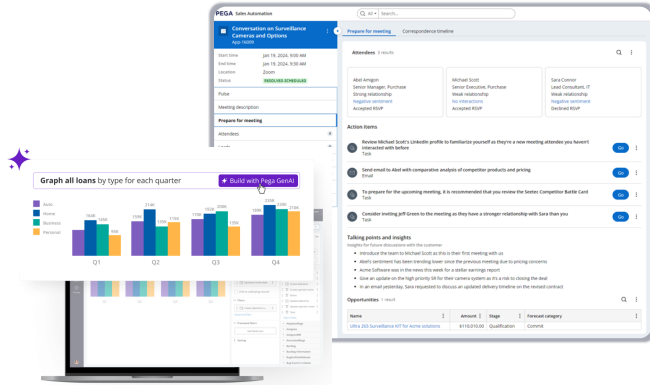
Unlock AI-powered Answers

Pega GenAI Knowledge Buddy™

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

Optimize Seller Productivity

Make Data Work for You

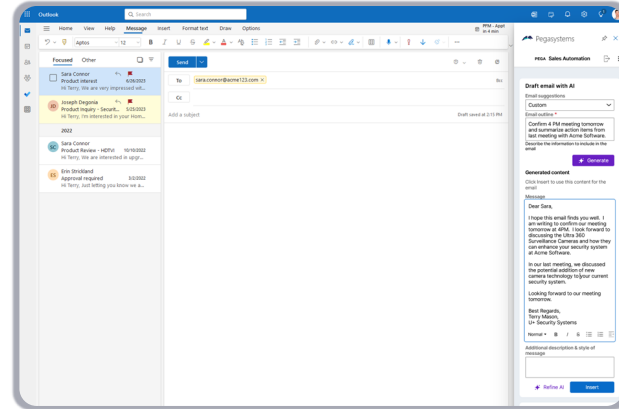
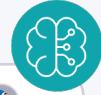


Make Every Meeting Your Best

Pega GenAI Analyze™

Generate on-demand briefings and talking points for sales meetings and automatically summarize wrap-up.

Focus on the Work That Matters



Streamline Communications

Pega GenAI Automate™

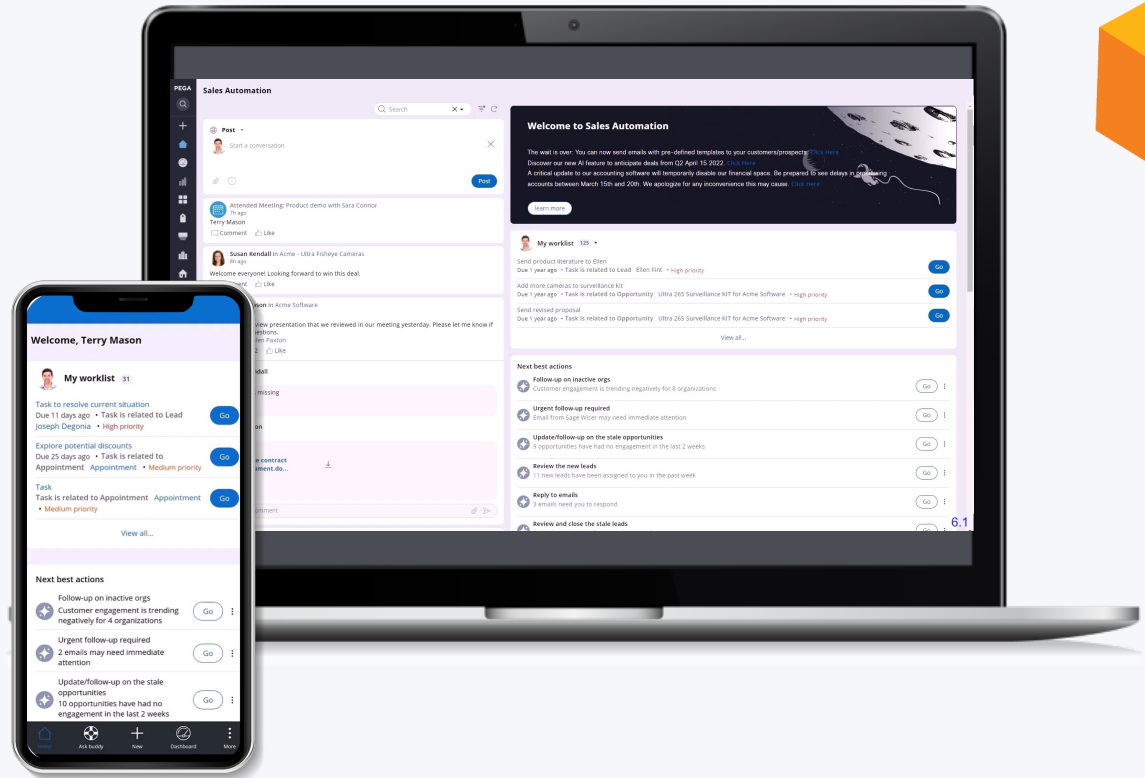
Enhances seller productivity by automating manual work like composing emails and chat messages.

Pega Sales Automation: see it in action



Pega Sales Automation Has Everything You Need

- AI next best action
- AI next best offer
- AI sales coach
- AI futureCast
- AI lead scoring
- Voice AI
- Guided selling
- Outlook/G-suite calendar & email integration
- Gen AI for email
- Sales chatbot lead qualification
- Digital messaging
- Automated lead routing
- Meeting preparation & wrap up
- Reporting and forecasting
- Insight dashboards
- Route planning
- Mobility and collaboration
- Real-time video meeting add-in
- Partner relationship management
- LinkedIn navigator integration
- Data import wizard
- Live data / data virtualization

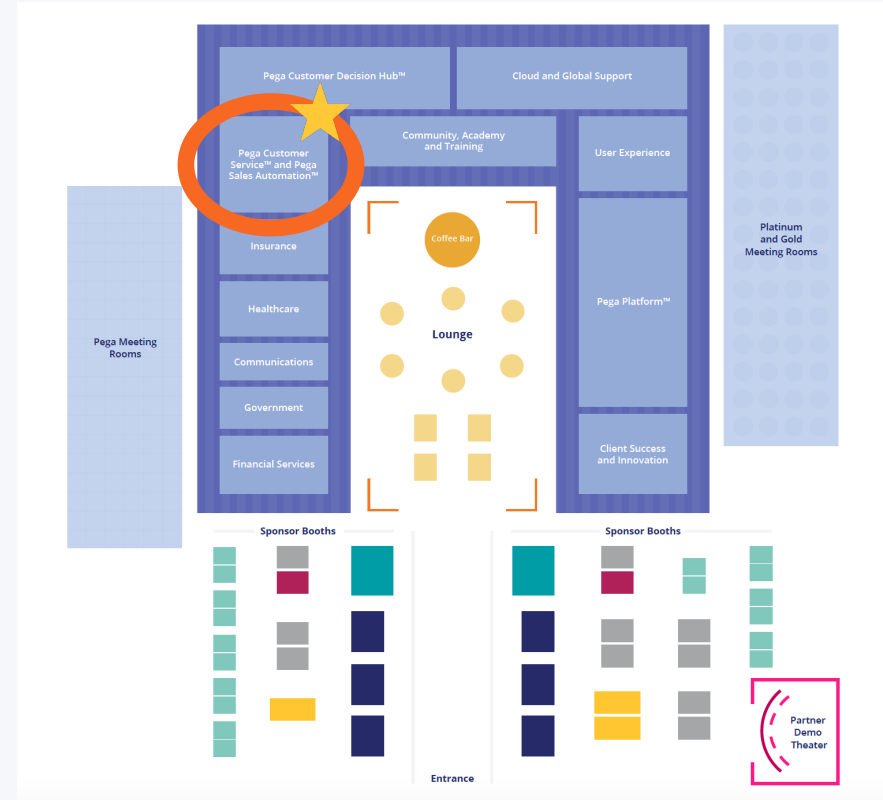


Make The Most Out of Your PegaWorld Experience

Church Mutual's Digital Transformation Journey with P3Fusion and Pega

An Everyday App To Grow the Sales Agent Business for Great Eastern Life

Visit the Pega Sales Automation booth in the Innovation Hub





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