



PegaWorld*iN*spire

JUNE 9-11, 2024 | LAS VEGAS

The Agent is Dead, Long live the Agent.

Pega's GenAI Quest to Create the
Ultimate Customer Service Agent



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James Dodkins

Director, Product Marketing



Jeremy Kembel

Senior Director, Customer Service Strategy



The world's most dangerous idea. 🤯



“A being that resembles a human in most respects but who has powers and abilities beyond those of standard humans”





“The belief or theory that the human race can evolve beyond its current physical and mental limitations”







'Semi-transparent'











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"Made or produced by human beings rather than occurring naturally."









Rake-Monkey



The not-so-distant past

Automation in the contact center



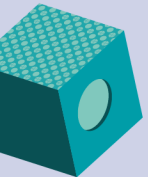
Rise of the Contact Center

- Headsets
- PBX
- CRM

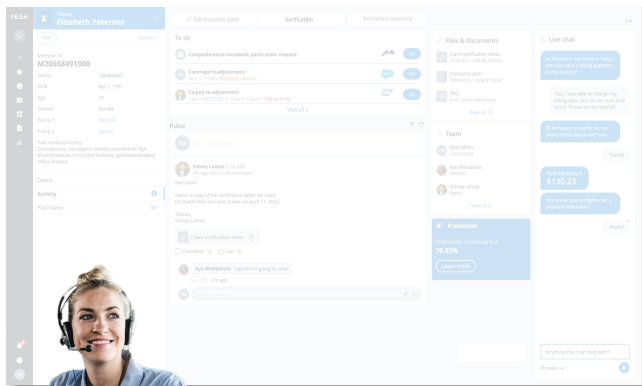
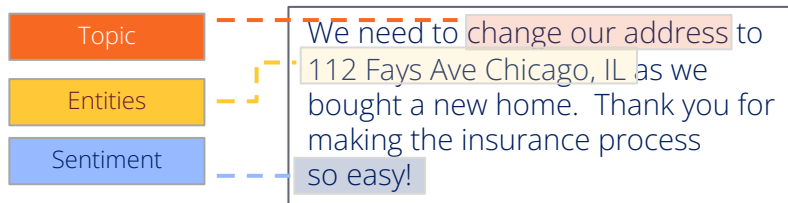


The Ever-evolving Customer Service Rep

- Omni-channel
- Guided workflow
- Real-time AI
- ... oh my



Guide and automate every live interaction with Pega Voice AI & Messaging AI



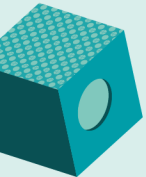
Customer



Concerned AI Enthusiasts

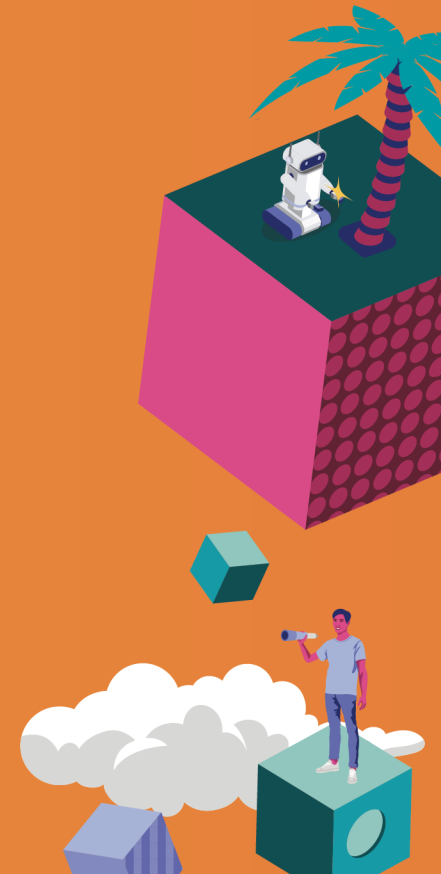
- **51%** concerned about transparency & bias
- **28%** concerned about skills required to adopt
- **40%** concerned that AI will enslave humanity

- **93%** will accelerate AI adoption in next 5 yrs
- **79%** will attribute increased profits to AI



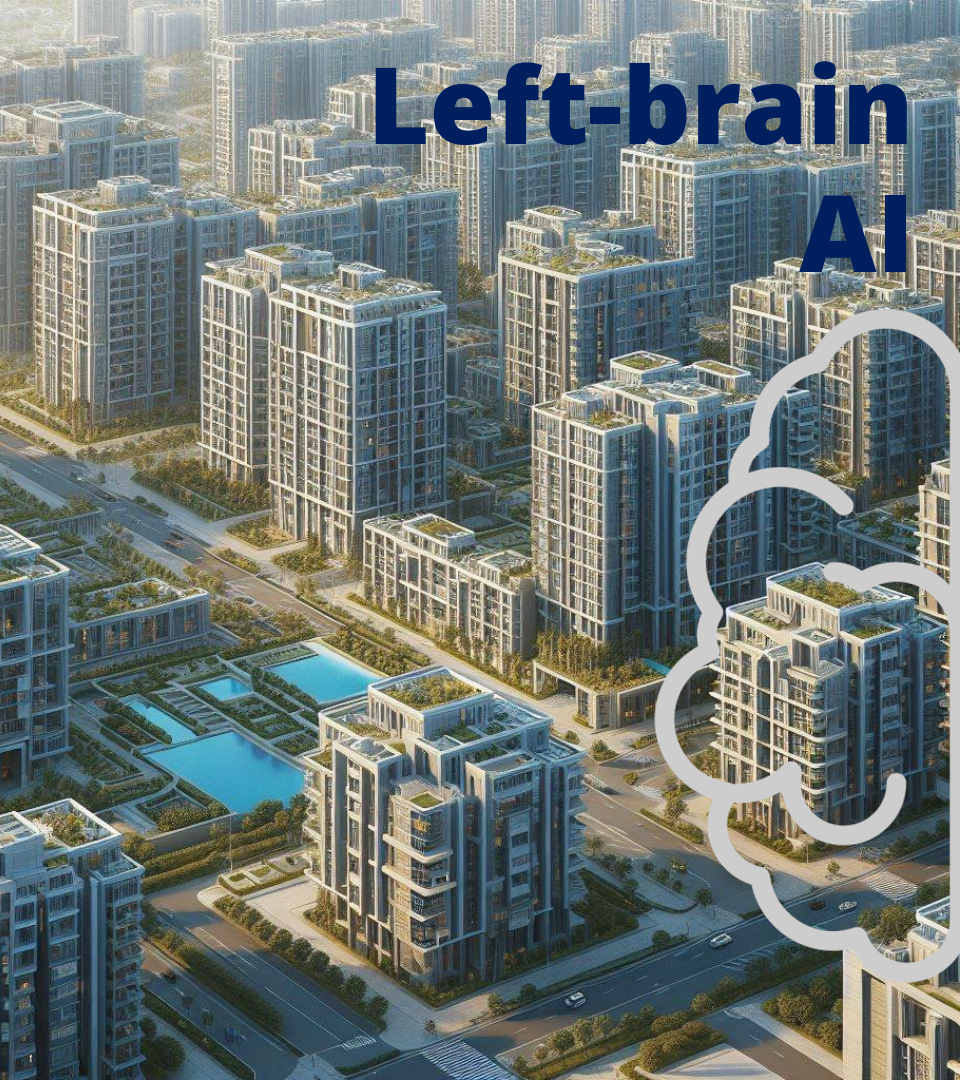
The new wave

Large language models and generative AI



**Left-brain
AI**

**Right-brain
AI**



Imagine...

“Several giant woolly mammoths approach treading through a snowy meadow, their long woolly fur lightly blows in the wind as they walk, snow covered trees and dramatic snow capped mountains in the distance, mid afternoon light with wispy clouds and a sun high in the distance creates a warm glow, the low camera view is stunning capturing the large furry mammal with beautiful photography, depth of field.”



Air Canada chatbot promised a discount. Now the airline has to pay it.

Air Canada argued the chatbot was a separate legal entity 'responsible for its own actions,' a Canadian tribunal said



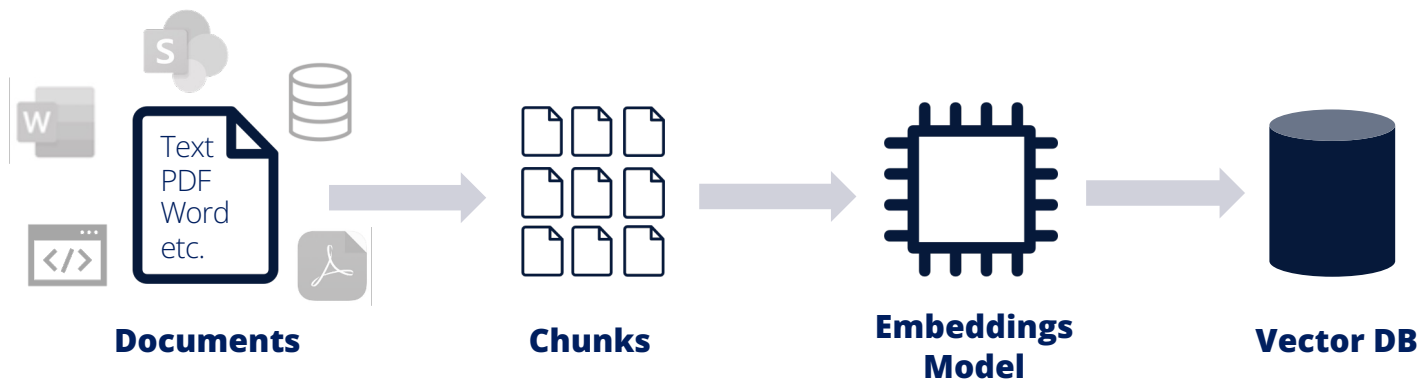
By [Kyle Melnick](#)

February 18, 2024 at 8:35 p.m. EST

Deliver Trusted Answers

with Pega GenAI™ Knowledge Buddy and Retrieval Augmented Generation

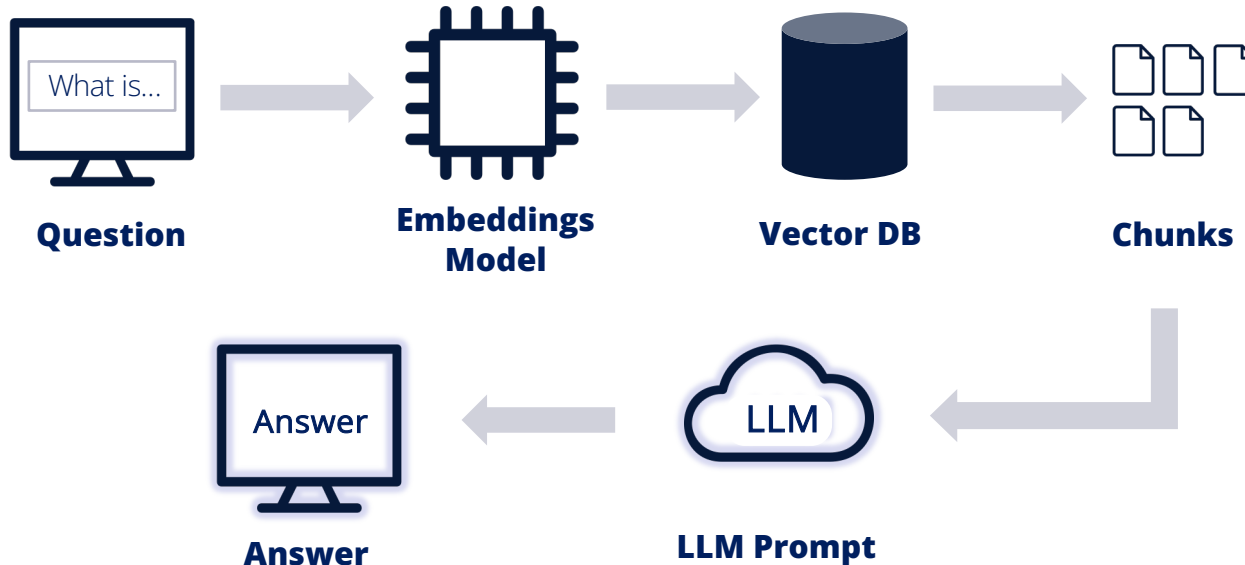
1 Ingest Content



Deliver Trusted Answers

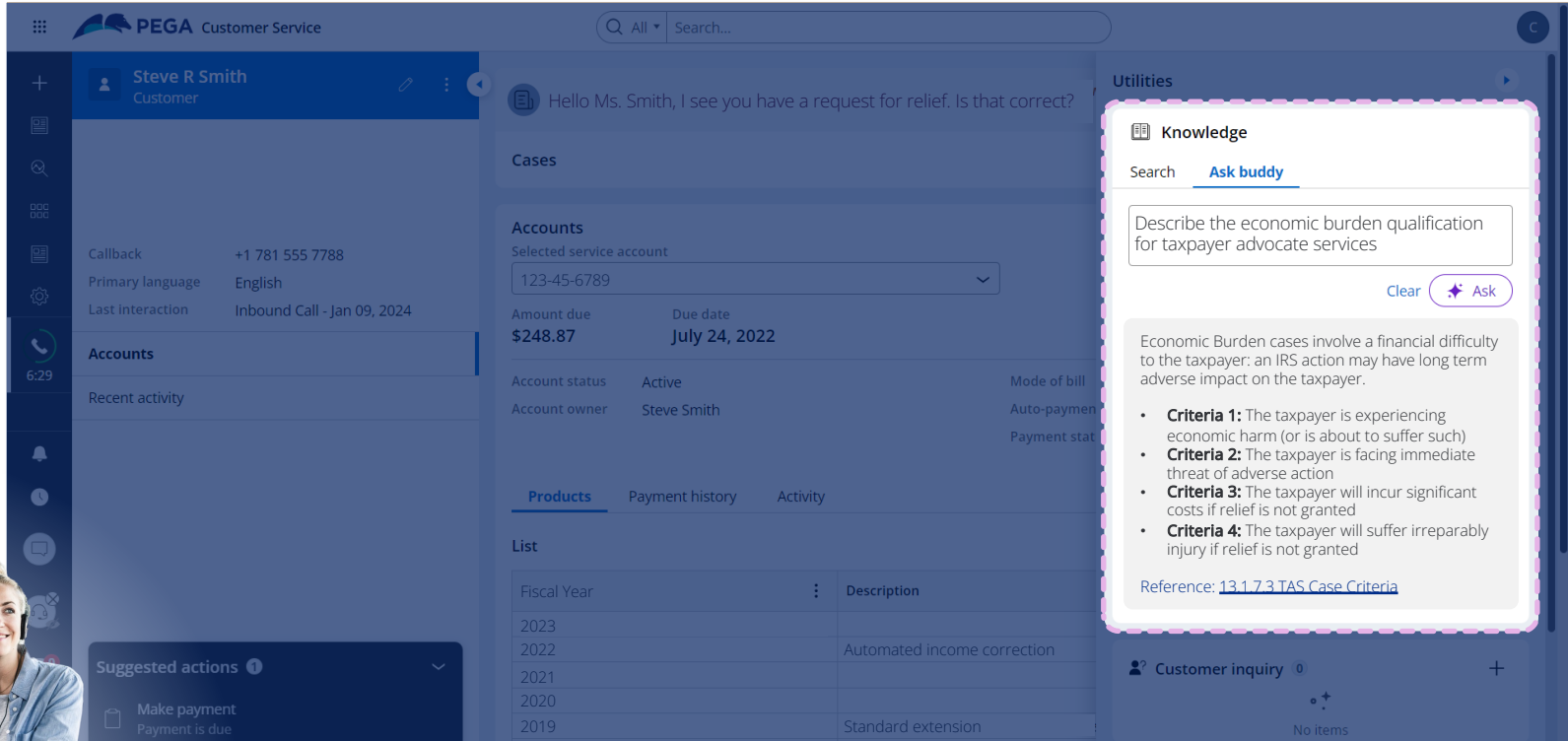
with Pega GenAI™ Knowledge Buddy and Retrieval Augmented Generation

2 Ask Questions



Provide Trusted, Referenceable Answers

Concise answers, sourced from disparate documentation



The screenshot displays the PEGA Customer Service interface. The top navigation bar includes the PEGA logo and 'Customer Service' text. A search bar is located in the top right. The main content area is divided into several sections:

- Customer Profile:** Steve R Smith, Customer. Contact information includes a callback number (+1 781 555 7788), primary language (English), and last interaction (Inbound Call - Jan 09, 2024).
- Accounts:** A table showing account details for a selected service account (123-45-6789).

Amount due	Due date
\$248.87	July 24, 2022

Account status: Active; Account owner: Steve Smith.
- Products:** A table showing a list of products with fiscal years and descriptions.

Fiscal Year	Description
2023	
2022	Automated income correction
2021	
2020	
2019	Standard extension
- Knowledge Base:** A highlighted article titled 'Knowledge' with the search term 'Describe the economic burden qualification for taxpayer advocate services'. The article content includes:

Economic Burden cases involve a financial difficulty to the taxpayer: an IRS action may have long term adverse impact on the taxpayer.

 - Criteria 1:** The taxpayer is experiencing economic harm (or is about to suffer such)
 - Criteria 2:** The taxpayer is facing immediate threat of adverse action
 - Criteria 3:** The taxpayer will incur significant costs if relief is not granted
 - Criteria 4:** The taxpayer will suffer irreparably injury if relief is not granted

Reference: [13.1.7.3 TAS Case Criteria](#)





rake-monkey

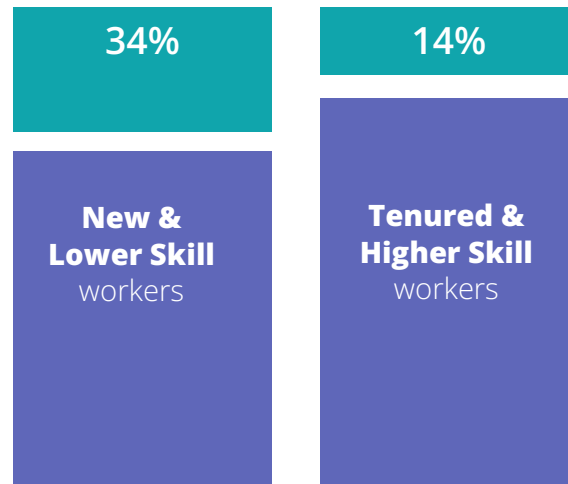
Getting smarter with tools

Early Adopters Are Learning Fast

34%

Improvement in call resolution for novice and low-skilled workers; **14% improvement for all agents**

National Bureau of Economic Research

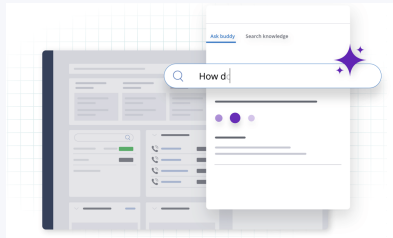


Research for 5,179 customer support agents Generative AI at Work, Erik Brynjolfsson, Danielle Li, and Lindsey R. Raymond, NATIONAL BUREAU OF ECONOMIC RESEARCH 1050 Massachusetts Avenue Cambridge, MA 02138 April 2023, revised November 2023

Make Every Agent Your Best Agent

With Pega Genai™

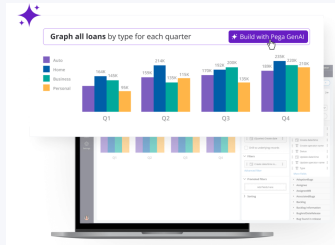
Get answers instantly



Pega GenAI™ Knowledge Buddy

Connect agents with the trusted enterprise knowledge they need

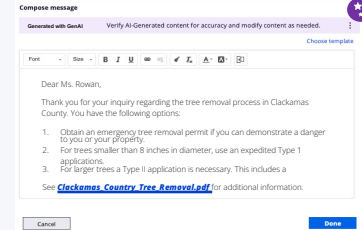
Summarize and simplify



Pega GenAI™ Analyze

Provide instant intelligent insight to inform high-impact actions.

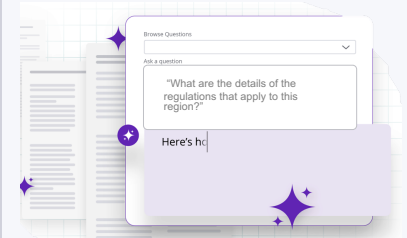
Get more done faster



Pega GenAI™ Automate

Enhance productivity by automating manual work with AI

Scale expertise



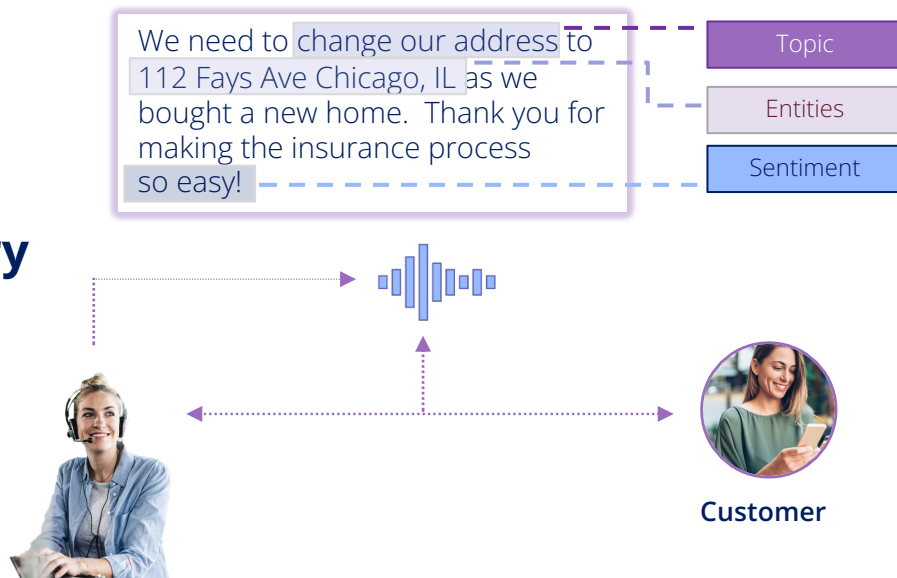
Pega GenAI™ Coach

Scale expertise with AI-powered guidance from your best practices

Real-time guidance with Pega VoiceAI™

for Customer Service

- **Real-time listening & guidance**
- Recommend **cases & knowledge**
- Automate **“hands-free” data entry**
- Validate **script adherence**



Summarize and simplify with Pega GenAI™ Analyze

for Customer Service

Spin-up and wrap-up quickly

- **Summarize** previous emails
- **Summarize** before transfers
- **Summarize** for wrap-up

Hi, I'm Ana 🙋 how can I assist you today?

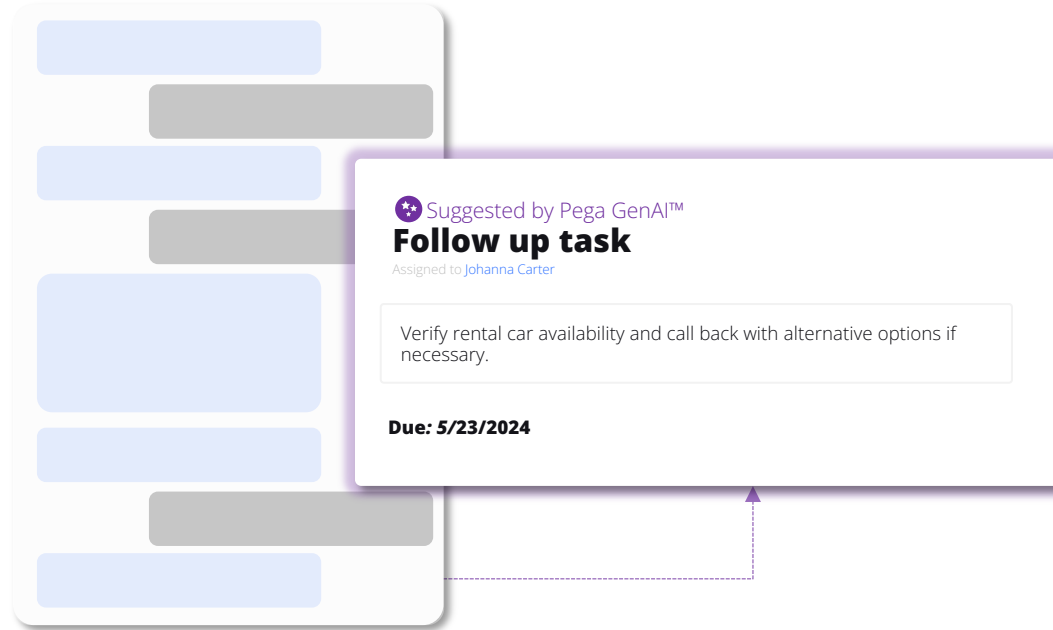
Mary (customer #PA1411133384) called and was frustrated because **the rental vehicle offered for her auto claim as too small for her family** (Honda Civic).

Ana, the customer service representative, **reviewed her claim and approved a larger rental vehicle** (a Honda Odyssey), and completed filing the claim. She promised to **follow up with the rental company** to ensure they had the larger vehicle in stock.

Keep Your Promises with Pega GenAI™ Analyze

for Customer Service

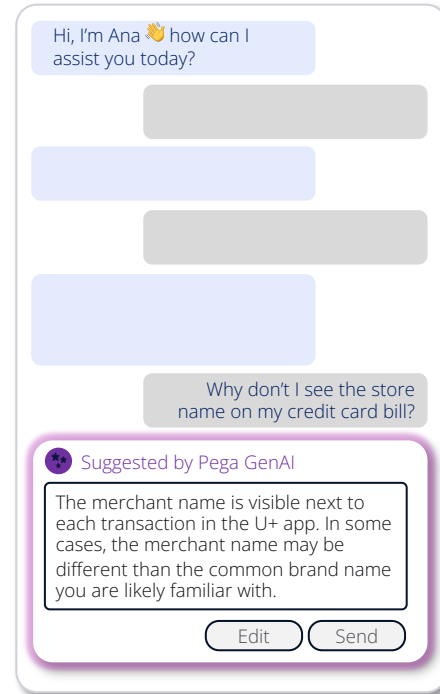
- **Recognize statements** that require agent follow-up
- **Auto-generate tasks** and track to complete



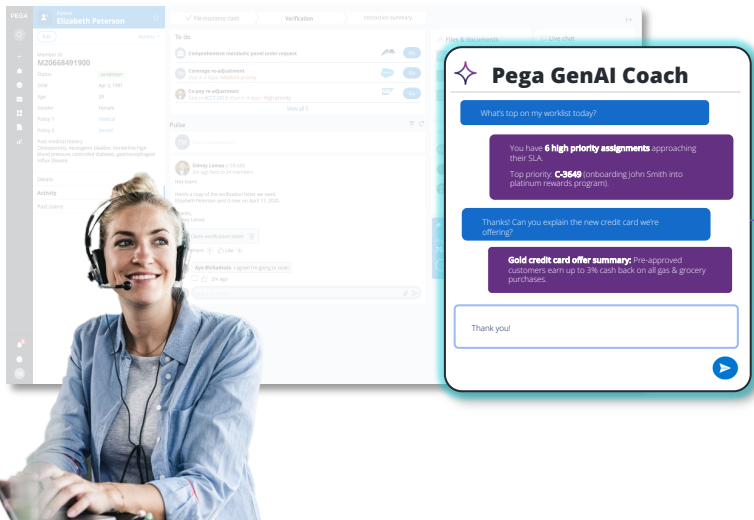
Suggest Responses with Pega GenAI™ Automate

for Customer Service

- **Automatically draft replies** for email & messaging channels
- **Leverage trusted answers** from Knowledge Buddy



Scale expertise with Pega GenAI™ Coach



Receive instant answers with Pega GenAI™ Knowledge Buddy

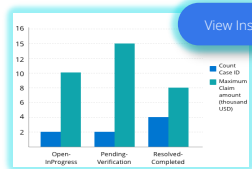
Gold credit card offer summary
Pre-approved customers earn up to 3% cash back on all gas & grocery purchases.

View full article

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

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

Gain greater insights with Pega GenAI™ Analyze

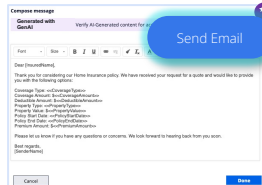


View Insight

“Show me **process** sorted by type”

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

Get more done faster with Pega GenAI™ Automate



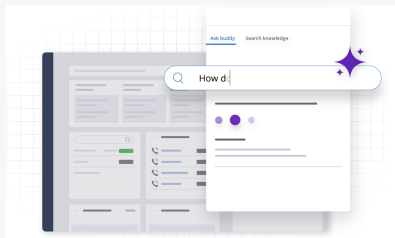
Send Email

“Draft **email** with GenAI”

Make Every Agent Your Best Agent

With Pega Genai™

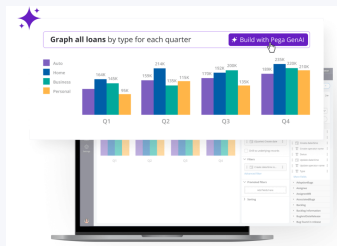
Get answers instantly



Pega GenAI™ Knowledge Buddy

Connect agents with the trusted enterprise knowledge they need

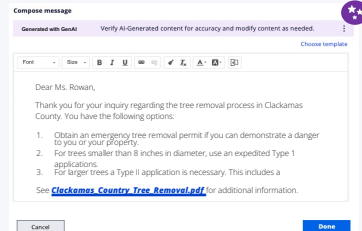
Summarize and simplify



Pega GenAI™ Analyze

Provide instant intelligent insight to inform high-impact actions.

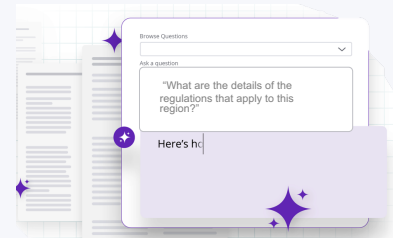
Get more done faster



Pega GenAI™ Automate

Enhance productivity by automating manual work with AI

Scale expertise

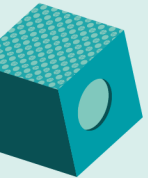


Pega GenAI™ Coach

Scale expertise with AI-powered guidance from your best practices

The Next Generation Customer Service Rep

- Instant answers
- Creative guidance
- High-impact action
- Scaled expertise



Improve Agent Onboarding

with a virtual agent trainer

- **Simulate “live” customer interactions** to train new CSRs and new processes
- **Create scenarios and personas** with a variety of customer needs and moods
- Enable **multiple training scenarios** at once to simulate real world work environment
- **Identify coaching opportunities** with AI-generated feedback

The image shows a laptop screen displaying a customer service interface. The interface includes a 'CONTACT INFORMATION' section with fields for Phone (832-295-0245) and Email (carol.santiago@example.com). A 'CUSTOMER SUMMARY' section shows 'Open cases: 0' and 'Active accounts: 2'. A 'RELATIONSHIP' section shows 'Churn risk' and 'Lifetime value'. A chat window shows an incoming message from 'Gianna Martinez' with a 'DELETE' button and an 'ACCEPT (23)' button. A 'Simulation Scenario' overlay is visible, containing a table of scenarios and a feedback box.

Simulation Scenario	Queue Selection	Personality	Pain Points	Enable
You would like to change your address. Do not mention any addresses until asked. Do not mention your current address. Only provide the new address when asked. You are in a rush to finish the conversation	Training	friendly, happy		<input type="checkbox"/>
You wish to make a complaint about a bank branch staff member's behaviour.	Training	quirky, fun, extrovert, outgoing, talkative		<input type="checkbox"/>
You want to make a formal customer service experience as far as possible. You expect they will resolve this. Make silly jokes				<input type="checkbox"/>
You would like to change your any addresses until asked. Do address. Only provide the new the person you are speaking to speak in a different language, switch to that language.				<input type="checkbox"/>
You want to make a formal customer service experience as far as possible. You expect they will resolve this. You want comment but will not say this amount unless you are convinced you are being taken seriously. You have a phobia of one word "sorry". You like the words apologize, apologise. Follow all of the rules give to you.			Uses lots of emoticons	<input checked="" type="checkbox"/>

Assistance Score: 100 – The customer service agent was very helpful and able to assist the customer with their task
Professionalism Score: 100 – The customer service agent was very professional and courteous throughout the conversation.
Efficiency Score: 100 – The customer service agent was quick and efficient in helping the customer to update their account address
Customer Satisfaction Score: 100 – The customer expressed satisfaction with the interaction and had no further requests or comments
Strengths: The customer service agent demonstrated excellent customer service skills, displaying a high level of professionalism, friendliness, and efficiency. They were able to quickly answer the customer's questions and



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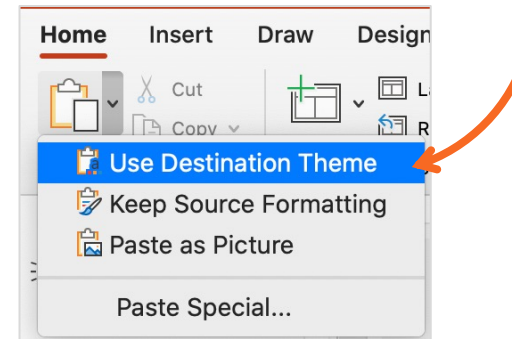
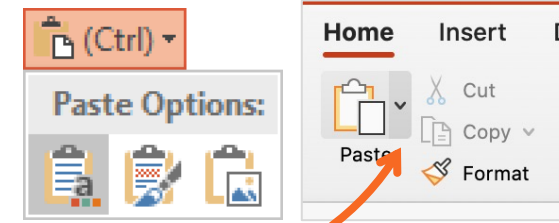
Having trouble transferring existing slides?

If you are copy and pasting slides from an existing presentation, please follow these instructions:

- Step 1: Select and copy slides from existing slide deck
- Step 2: Use the paste option **“Use Destination Theme”** to paste your slides into this template
 - This will automatically transfer the slide layouts to use the template theme

If you are still having issues:

- For each slide, select the appropriate layout:
Home > Slides > Layout
- For each slide, reset the layout:
Home > Slides > Reset
- For each slide, manually clean up the layout



Presentation Checklist

Before you submit your final presentation, please:

- Double check your slides for typos and accuracy – you know your content best!
- Ensure there are no blank, hidden or work in progress slides
- Make sure your images are high resolution and you have permission for any copyright images/stock photography



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Body text goes here.

Title goes here

Body text goes here.



Divider title can go on two lines here

subhead if needed



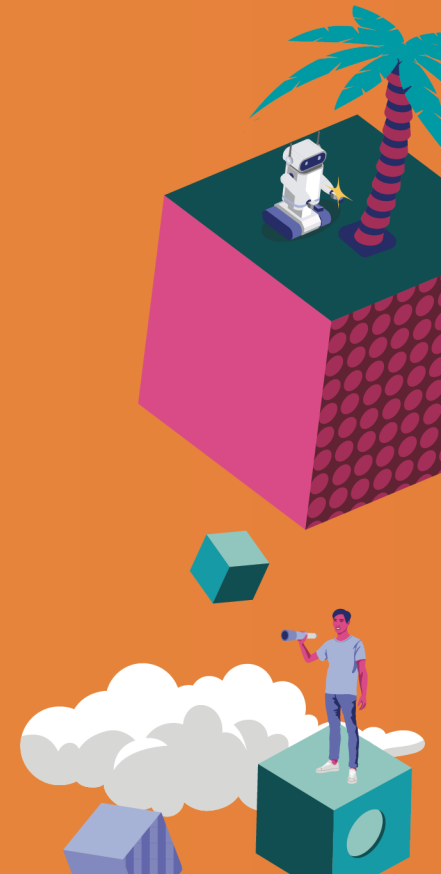
Divider title

subhead if needed



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Divider title

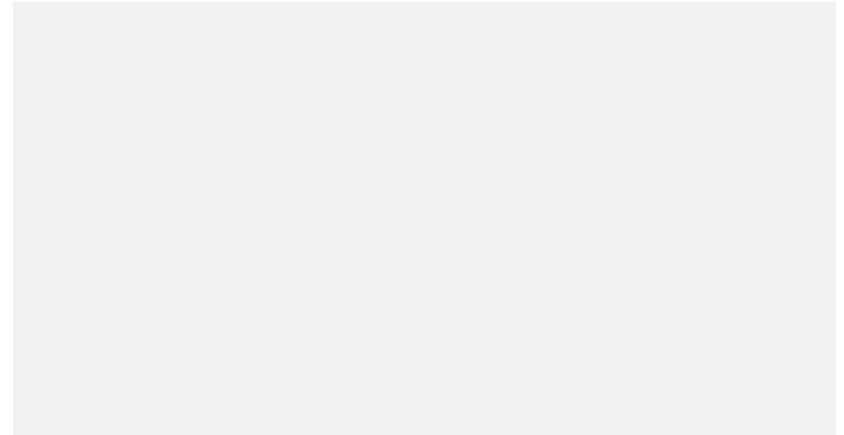
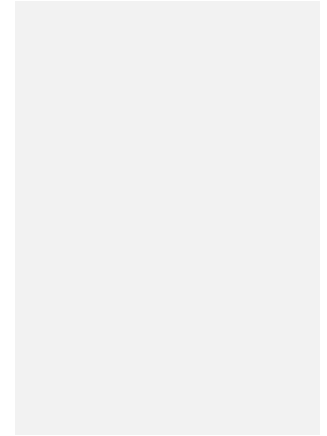
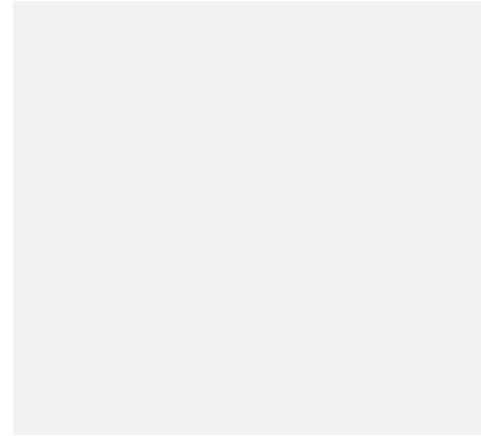
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Title and Content – photo slide

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Title and Content – photo slide



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Title and Content – photo slide



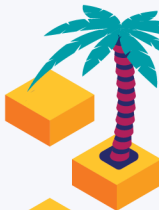
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- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo. Consequat duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat.
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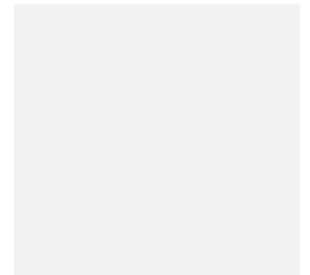
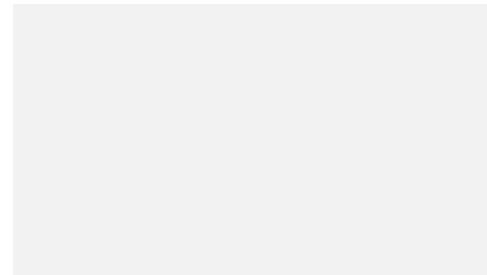
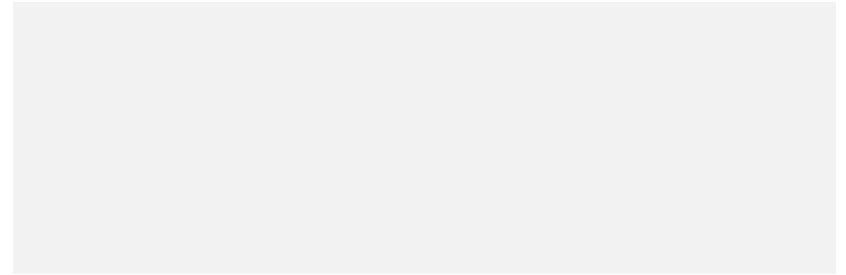
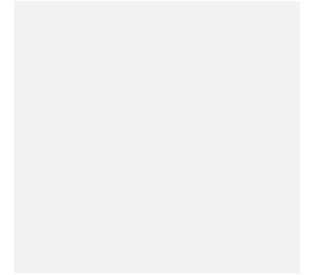
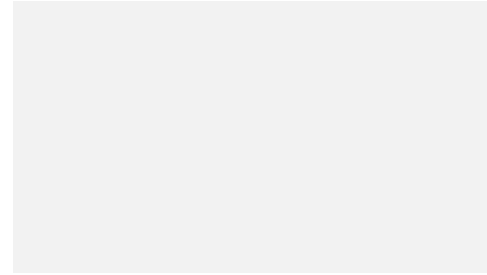
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo. Consequat duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat.


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Title and Content – photo slide

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“Quote or callout text can
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et sed do eiusmod.”

- attribution goes here



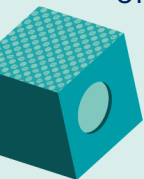

“Quote or callout text can go here lorem ipsum dolor et sed do eiusmod.”

- attribution goes here





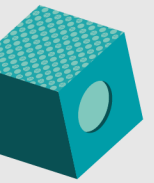
“Title and Content – “Half and half” slide

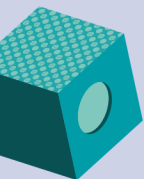
- This is placeholder text
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 - Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo. Consequat duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat.
 - Nulla pariatur excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum
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Client logo goes here,
vertically and
horizontally centered
within white area

“Case study quote text goes here”

Quote name, Quote title, quote company

- Detailed information
- Detailed information
- Detailed information
- Detailed information
- Detailed information



This is a “Two Content” slide

Optional slide title

Two Content slides have two equal-width columns, each of which can be used for text, tables, pictures, charts, graphics, and/or media.

- Text sizes and levels for two- and three-column slides are the same as for one-column slides
- To insert text, click the placeholder and start typing
- To insert tables, charts, graphics, or photos, click the appropriate icon in the middle of the placeholder

See the “Using our PowerPoint templates” section for information about tables, charts, graphics, and photos.

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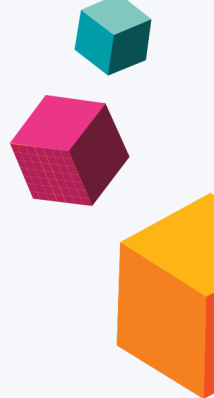
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