Pega Sales Automation for Financial Services

Enable relationship selling and increase revenue with AI-based sales guidance

A Pega Sales Automation Datasheet

A new kind of SFA for retail, small-business, and commercial banks

Pega Sales Automation™ is the first seller-centric sales force automation (SFA) system to put a digital brain on the desktop of every banking sales representative. It delivers proactive insights to agents, reps, and managers, identifying missed opportunities and providing guidance to sales teams on top opportunities and the best ways to progress rankings and close pipeline deals.

Whether you're a retail, small-business, or corporate bank, you'll benefit from the ability to use advanced analytics, case management, and business process management to ensure customers' needs are matched to suitable products.

Deployed on the cloud of your choice or on-premise, Pega Sales Automation is the only solution that optimizes the sales cycle and increases revenues by helping reps and agents connect to the entire customer journey – including marketing, customer service, and fulfillment.

We know you need to move at fintech speed. With our model-driven platform, you'll be on your way to business value within weeks, not months.

- **Boost revenue with guided selling**
  Pega's solution recommends next best content, actions, and suitable offers. Out-of-the-box processes cut implementation time and risk and enable change with minimal effort.
- **Increase visibility with real-time reports**
  Personalized role-based dashboards offer a real-time view into pipelines, leads, and forecasts, while clearly communicating changes and action items. AI-based forecasts equip managers with the most accurate and updated information.
- **Improve customer service across all channels**
  A 360-degree view enables reps to make the best decisions and become trusted advisors by knowing what's happening with the client at all times.
- **Increase productivity with mobile tools**
  Deploy on any device, and keep your business running regardless of connectivity.

Challenge

Your sales force automation system is probably not living up to its promise. This is because SFA has been built mainly for management visibility or to upsell widgets, not for relationship selling. What's needed is a system that provides accurate forecasts and gives personalized advice to reps so they can generate more revenue and deepen relationships.

Solution

Pega helps banks increase sales efficiency and effectiveness by:

- Continuously improving seller/agent effectiveness with AI-driven guidance.
- Providing visibility into sales channels, accelerating time to cash and streamlining work.
- Monitoring whether sellers are focused on the right activities through proactive insights and alerts.

Designed for financial services organizations, with out-of-the box functionality:

- Specific role-based dashboards and processes for retail, small-business, and corporate banks.
- Needs Analyzer capability with AI-driven suitable product recommendations and offers.
- Account and contact management, with geo-location and householding support.
- Branch banking territory reporting and forecasting.
- Over 40 standard dashboards and customizable report capabilities.
- Real-time 360-degree account view across sales, marketing, and service, with all accounts, services, and activity tracking available.

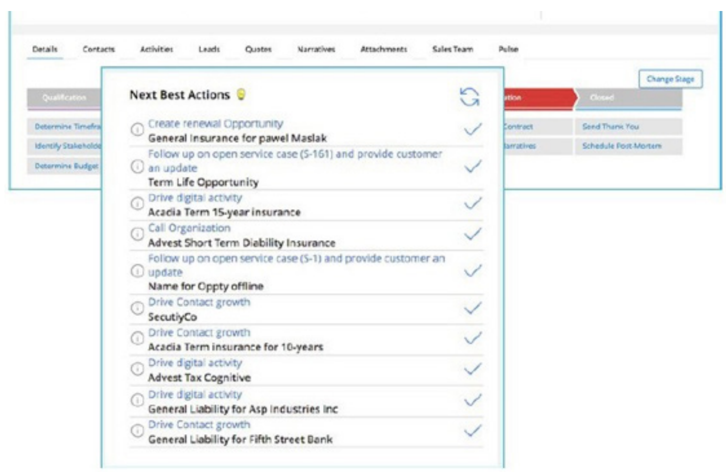
Built-in core features for sales force automation:

- Collaborative forecasting to update and capture close plans, identify competitors, collaborate with managers, and establish pricing overrides.
- Enterprise-class lead management, and fully integrated workflown tools to generate rules, tasks, and reminders.
- Event, task, and activity tracking across all contacts, leads, and opportunities.
- Outlook® integration for email and calendaring.
- Optimized for mobile users, with offline availability, responsive mobile access, and mobile administration console.
- Social collaboration and file sharing via Pega Pulse.

Built for change and architected to support your global lines of business, with lower total cost of ownership and maximum reuse:

- Simultaneous support for sales force automation and partner selling modes (B2C, B2B, and B2B2C) in one instance across multiple lines of business.
- User-definable workflow and process approval automation, including a Designer Studio to generate applications from a model-driven development environment.
- Online chat and co-browse.*
- Call telephony integration.*
- Robotic desktop and process automation.*

* Licensed separately



AI and guided processes ensure each offer meets both the customer's needs and your business goals.