How to Improve CX Across the Entire Customer Lifecycle

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Sr. Director of Product Marketing – Pega

Welcome!

Fortuné Alexander
Sr. Director, Product Marketing
Customer Service & Sales Automation

PEGA®

Rebecca Miller
Sr. Product Strategy Manager
Customer Service & Sales Automation

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Tech trends

Generative AI Will Revolutionize All Aspects of the Customer Experience

Marketing

Sales

Customer Service

Back Office

Generative AI

New: Pega GenAI™ Highlights for CX and EX

Marketing

- Create offer/campaign variants
- Personalize offers & ads
- Generate synthetic AI training data

Sales

- Summarize call/chat interactions
- Generate post-meeting action items
- Suggest email responses

Customer Service

- Train CSRs w/ customer simulator
- Automatically summarize call / chat interactions
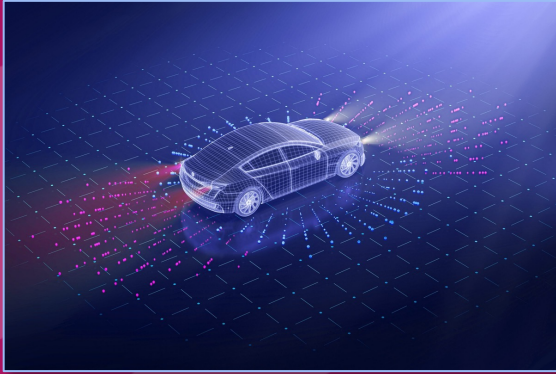- Make chatbots smarter by supporting intent identification

Back Office

- Visualize end-to-end workflows and uncover opportunities
- Turn conversational prompts into reports & dashboards
- Build and modify workflows fast with AI-driven suggestions

Generative AI
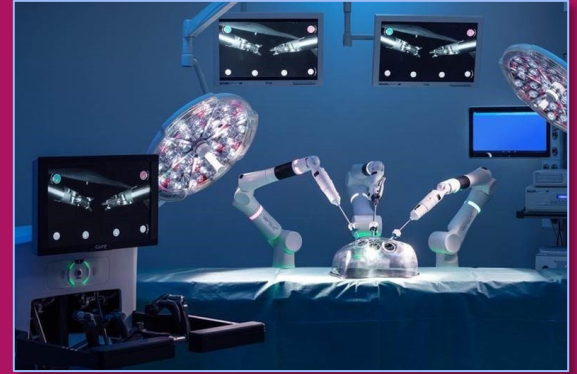
The Rise of Autonomous

Driving

Warehouses & Factories

Surgery

The Rise of Autonomous
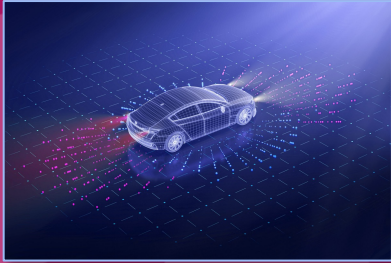
Driving

Warehouses & Factories
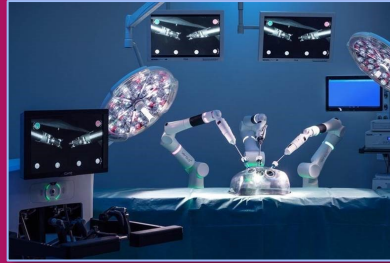
Surgery

Customer Experience??

Pega's Vision for Customer Experience

The Path to the Autonomous Enterprise

MANUAL

AUTONOMOUS

MANUAL
No AI/ automation

Basic automation
RPA, workflow

Guided processing
Case management with rules & guided processing

Partial automation
Automate classification, initial processing and simple decisions

AI-driven decisioning
Adaptive models learn and automate increasingly complex decisions

Fully autonomous experiences

AI
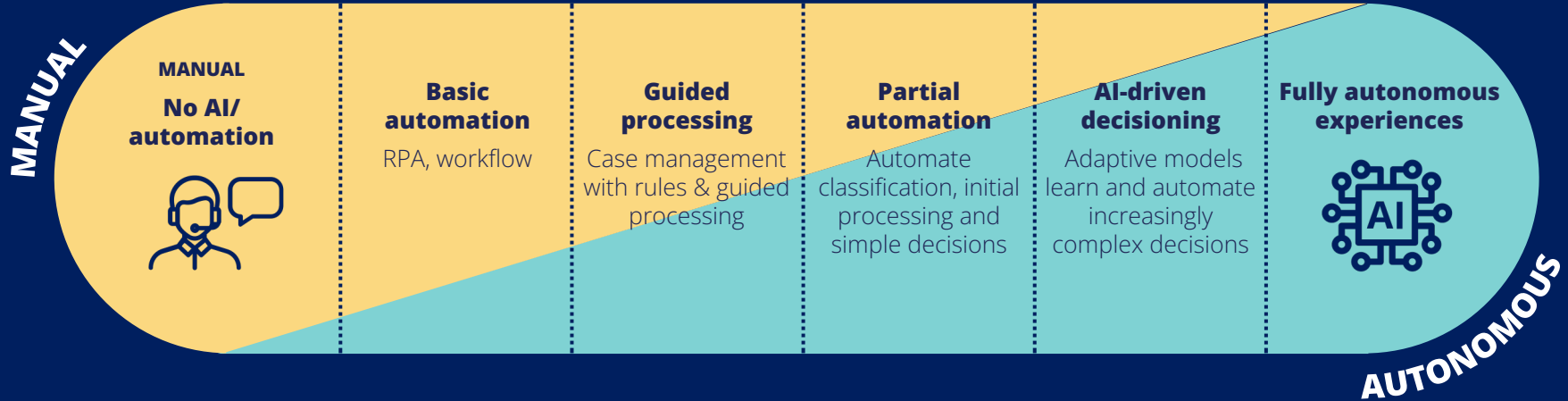
Core Ingredients to Deliver Autonomous Experiences

Pega's heritage and DNA

AI-Powered Decisioning

Workflow Automation

Low-code Platform

A Composable Customer Experience Platform

PEGA
CUSTOMER
DECISION HUB

PEGA
SALES
AUTOMATION

PEGA
PLATFORM

PEGA
CUSTOMER
SERVICE

MARKETING

SALES

OPERATIONS

CUSTOMER SERVICE

Pega Customer Decision Hub

The leader in real-time decisioning

Centralized Decisions

- Real-time customer **Next Best Actions**
- Contextual engagement driven by *propensity*
- Inbound & outbound in one platform
- From selling -> serving -> retaining in real-time
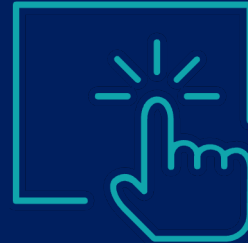
Why That Matters

- Every message is relevant (5X click-through)
- Offers cut through noise (3X conversion)
- Massive increase in **Customer Lifetime Value** *($430 million per year)*

ADDRESSABLE ACQUISITION
EMPATHETIC SELLING
PRE-EMPTIVE SERVICE
COMPASSIONATE COLLECTIONS
CONTEXTUAL NURTURE
PRO-ACTIVE RETENTION

Customer Decision Hub

Always-On, Contextual Customer Decisions

WELLS FARGO — **Personalized engagement for 70 M clients**

vodafone — **300% improvement in offer acceptance**

Rabobank — **1.5 billion+ interactions per year**

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Pega Sales Automation

The leader in sales force automation

Customer Activity

Seller

AI-Powered Decisioning

Workflow Automation
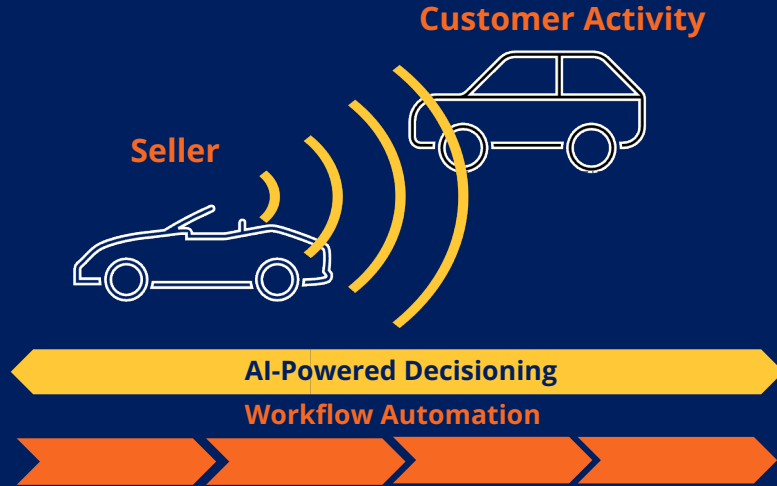
Automate and simplify complex sales processes so that your team can:

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

- **Eliminate critical selling blind spots** (improve visibility and sales cadence discipline across the sales cycle)

- Anticipate customer needs, guide sellers, and **optimize sales journeys from end-to-end**

CNO FINANCIAL GROUP — **Simplified 7 policy admin systems**

NISSHa — **Deployed Pega in just 12 weeks**

B|E|C|U — **Saved over 10,000 employee hours**

Pega Customer Service

Intelligently guide and seamlessly automate every service journey

Proactive Service

Self-service

Assisted Service

Back Office

AI-Powered Decisioning

Workflow Automation

Over 80% of top queries resolved w/ chatbot

Accelerating 30,000 interactions per day

40% reduction in average handle time

Aflac

First Tech federal credit union

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15

Turn *Every* Interaction Into a Self-service Opportunity

Customer

Web & Mobile — Portal

Chat & Messaging — Chatbot

Email — Email Bot

Call — IVR Bot

Self-Service Portal

Virtual Agent

CSR
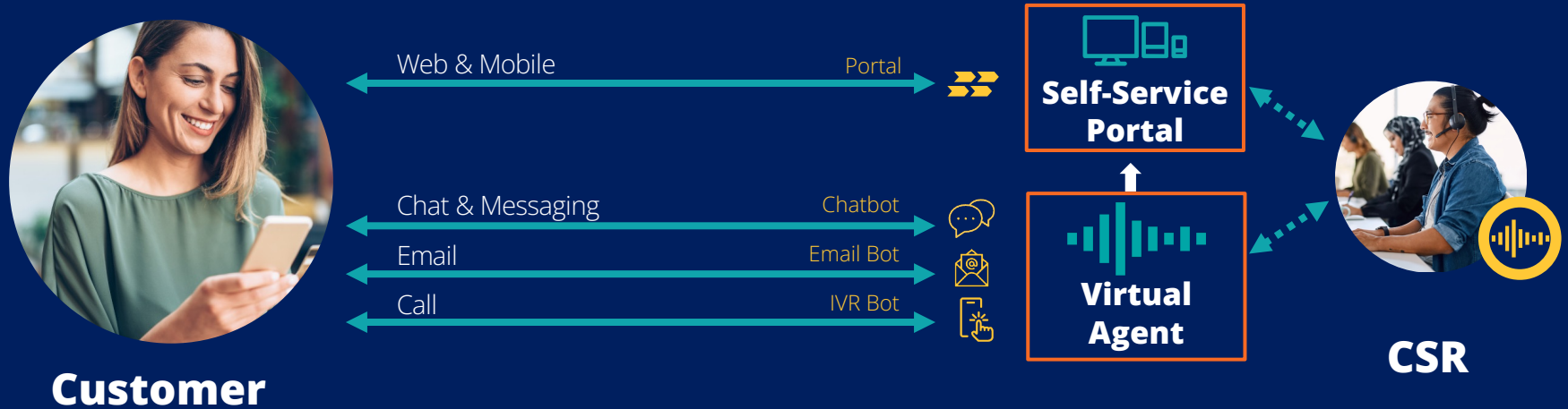
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Analysts recognize Pega as a leader

Pegasystems' vision is one of an "autonomous" CRM where automation offloads repetitive work, and AI assists users, increasing their efficiency, and the delivered customer Experience."

Core CRM Solutions
Forrester

Real-Time Interaction Management
Forrester

CRM Customer Engagement
Gartner

Sales Force Automation
Gartner

Low-code Application Platform
Gartner

PEGA

How does it really work?

PegaWorld**iN**spire

Center-out™ Business Architecture

Bridges the digital gap...one customer journey at a time

DX API

AI POWERED DECISIONING

WORKFLOW AUTOMATION

CASE MANAGEMENT

SITUATIONAL LAYER CAKE™

LIVE DATA

SIEBEL

Microsoft Dynamics

salesforce

Legacy DBs/Apps

Homegrown

3rd party Systems

C360

Rogue low-code apps & RPA

Data lakes

SAP Products Systems

Micro-services
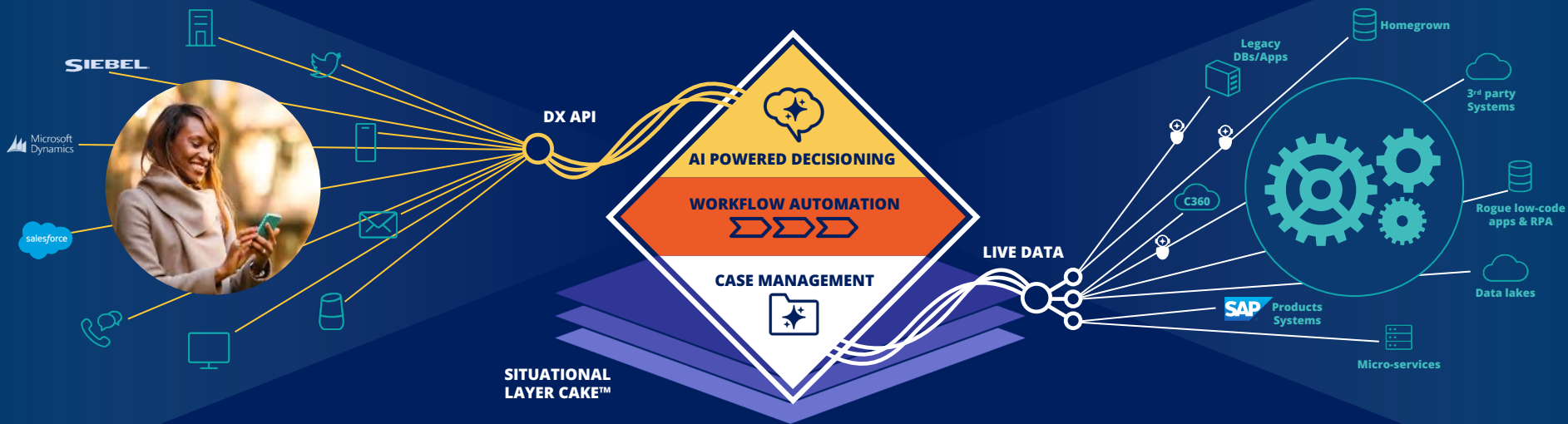
CHANNEL INDEPENDENCE

Extend across all your digital channels with DX API

LAYERS OF REUSE

Specialize by product, customer, region with the Situational Layer Cake™

DATA INDEPENDENCE

Consume any local or enterprise data source with Live Data

PEGA

Channel Independence

Extend across all your digital channels

Self-service

Custom

Web Embed

DX API SDK's

salesforce

Salesforce Lightning Extender

DX API
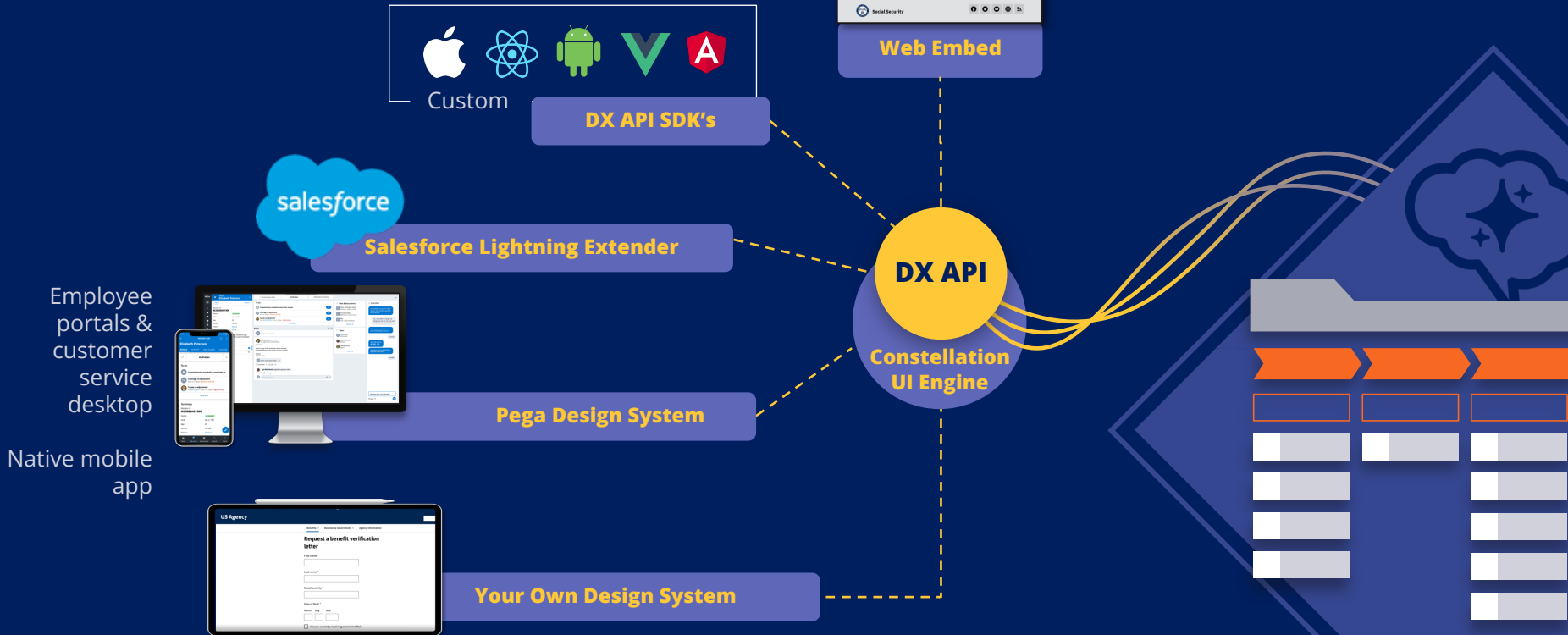
Employee
portals &
customer
service
desktop

**Constellation
UI Engine**

Native mobile
app

Pega Design System

US Agency

Request a benefit verification
letter

Your Own Design System

PEGA

A Composable CRM Architecture

NBA

Pega Call

Voice AI

Process AI

Chat & Messaging

RPA

Messaging AI

Workflow Automation

AI Decisioning

Workforce Intelligence

Chatbot

Low-code Platform

Knowledge Management

Co-browse

Email Bot

Low-code Innovation

IVR Bot

Ecosystem

NLP
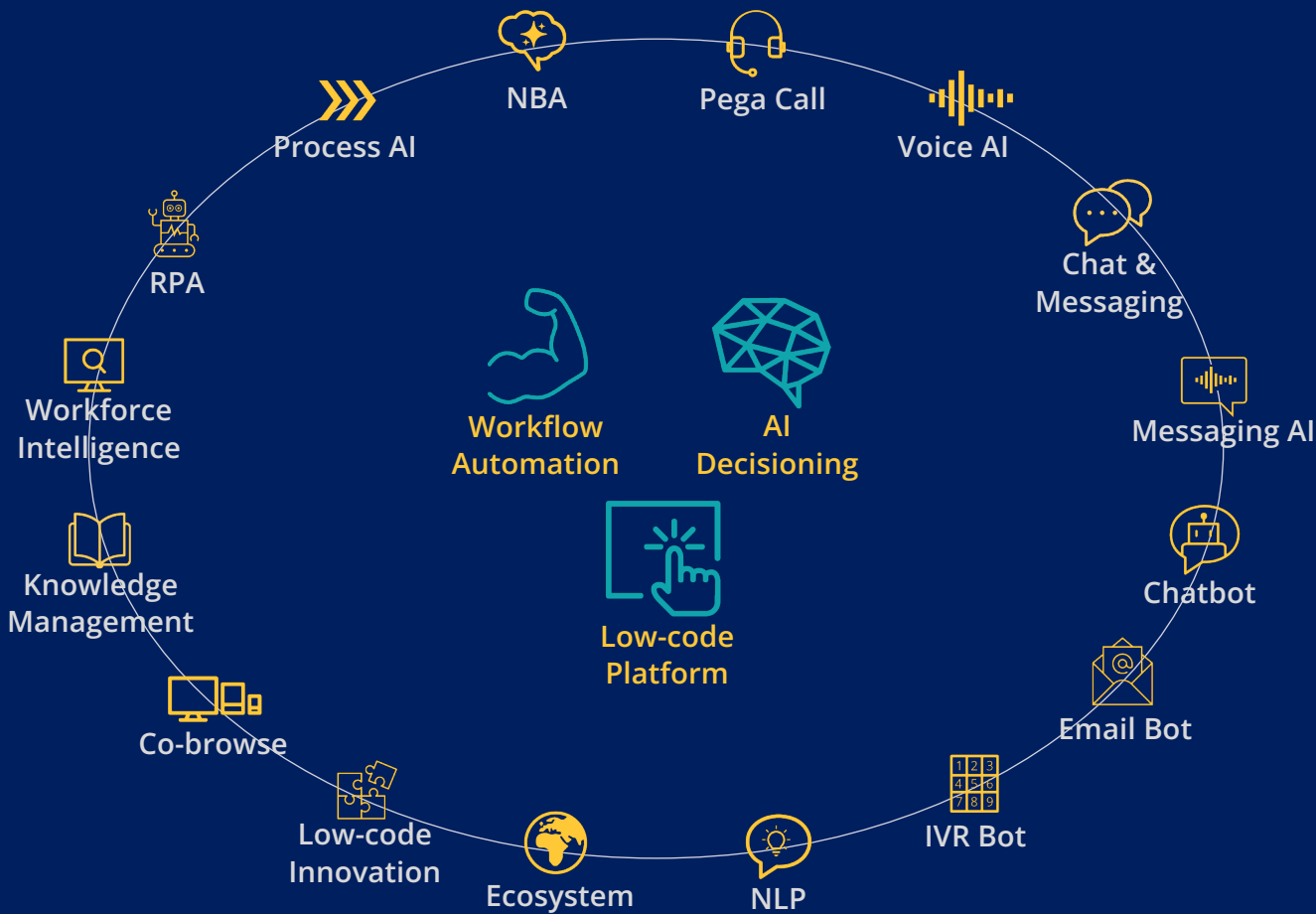
Individual Opportunity
Security system for Jamie Summers

✓ Qualification   Analysis   Proposal   Decision   Negotiation   Closed

Edit   Complete stage   Actions ▾

Amount	Close date
$5,000.00	**05/20/2022**

Win probability   25%
Territory   North East
Age   0 days
Primary contact   Jamie Summers
Owner   Terry Mason
Team Webex   💬
Must win   No
Source   Campaign
Short name   --
Forecast category   Commit
Sales type   New business

Pulse

Details

Contacts   1

Leads   0

Partner contacts   0

Close plans

Next best actions

✦ Review recent service request for Jamie Summers
A service ticket exists   Go   ⋮

Pulse   🔍 Search   ✕ ▾   ⇅   ↻

🌐 Post ▾   ✕

👤 Start a conversation

📎 ⓘ   Post

▼ Bill jones
  May 05, 2022 3:05 AM
  Customer accepted Security plan offer
  💬 Comment   👍 Like

▼ added a contact
  Apr 27, 2022 7:04 AM
  Jamie Summers was added as a relationship
  💬 Comment   👍 Like

✦ AI insights

⊘ 51   Likelihood to move to Proposal stage

⊘ 46   Likelihood to close as won

⊘   Likely to close later
         May 31, 22 - Jun 05, 22

Knowledge articles

🔍 Search

Suggested articles

Customer FAQs when selling security systems

Sales team (1)   ⚙

👤 Terry Mason (100%)   📞 ✉
   Owner

Files & documents (0)   ⚙

No items

Followers (0)   ⚙

22

Contact
Jamie Summers

Next best actions

No items

Edit   Actions ▾

Client type   Total amount of opps
Prospect $5,000

Webex   [ ]
Mobile phone   617-455-0310
Work phone   ---
Email   jamiesummers35@pegats.onmicrosoft
Territory   North East
Individual   Jamie Summers
account
Owner   Terry Mason
Reports to   ---

Pulse

Associations   1

Opportunities   1

Leads   0

Households   0

Customer profile

Timeline

Service cases 7

Guided troubleshooter
RESOLVED Resolved on: May 10, 2022

Self-service Installation
RESOLVED Resolved on: May 10, 2022

Opportunity created by CSR
OPEN Due: May 4, 2022

Accepts security system offer
RESOLVED Resolved on: May 10, 2022

View all...

Products ○

Personalized bundle
Price $80.00

TV ultimate
Price $300.00

iPhone X
Price $150.00

SD Set top box
Price $100.00

View all...

Service interactions

🔍 Search   ✕ ▾

🌐 Post ▾

Start a conversation

📞 Phone call
1d ago

Bill Jones completed a call
💬 Comment 👍 Like

Bill Jones Service interactions
1d ago
Web messaging
💬 Comment 👍 Like

Bill Jones Service interactions
1d ago
Web messaging
💬 Comment 👍 Like

Bill Jones Service interactions
1d ago
Web Chat Communication
💬 Comment 👍 Like

Knowledge articles

🔍 Search

Suggested articles

No items

Top offers

60 Premium monitoring plan

44 4K security camera upgrade

22 Motion sensor add-on package

👥 Contact team (1) ⚙

Terry Mason
Owner

📎 Files & documents (0) ⚙

No items

23

Edit   Actions ▾

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Work phone   ---
Email   jamiesummers35@pegats.onmicrosoft
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Web Chat Communication
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Knowledge articles

Search

Suggested articles

No items

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44   4K security camera upgrade

22   Motion sensor add-on package

👥 Contact team (1)

Terry Mason
Owner

📎 Files & documents (0)

No items

24

Security system for Jamie Summers

✓ Qualification | Analysis | Proposal | Decision | Negotiation | Closed

Edit | Complete stage | Actions ▾

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Team Webex	💬
Must win	No
Source	Campaign
Short name	--
Forecast category	Commit
Sales type	New business

Pulse

Details

Contacts — 1

Leads — 0

Partner contacts — 0

Close plans

Next best actions

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A service ticket exists

Go | ⋮

Pulse

🔍 Search ✕ ▾ | ⚙ | ↻

🌐 Post ▾

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46 — Likelihood to close as won

Top 3 predictors
- Service Requests 2
- Recent sales activity
- Sentiment trend

See all details

Likely to close later
May 30, 22 - Jun 04, 22

📄 Knowledge articles

🔍 Search

Suggested articles

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👥 Sales team (1) ⚙

Terry Mason (100%) 📞 ✉
Owner

📎 Files & documents (0) ⚙

No items

25

Security system for Jamie Summers

Qualification	Analysis	Proposal	Decision	Negotiation	Closed
✓ Determine time-frame	Identify competition	Proposal development	Confirm decision date	Prepare contract	Confirm renewal decision
✓ Identify stakeholders	Identify sales team		Request discounts	Weekly close plan	Send thank you
✓ Determine budget					Schedule post-mortem

Edit   **Complete stage**   Actions ▾

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Pulse

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Close plans

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A service ticket exists   **Go**   ⋮

Pulse

🌐 Post ▾

@bill

	Mention a user
Bill Jones Customer Service Rep	

📎 ⓘ   **Post**

May 05, 2022 3:05 AM

Customer accepted Security plan offer

💬 Comment   👍 Like

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🔍 Search

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Terry Mason (100%)
Owner

📎 Files & documents (0)   ⚙

No items

👥 Followers (0)   ⚙

Key Takeaways

- Begin with Center-out^{TM} architecture
  - Build around the customer journey

- What may have felt out of reach and is now possible: A new generation of CX technology is here

- Focus on an agile, incremental approach You don't have to do it all at once

- Make the most out of your PegaWorld experience!
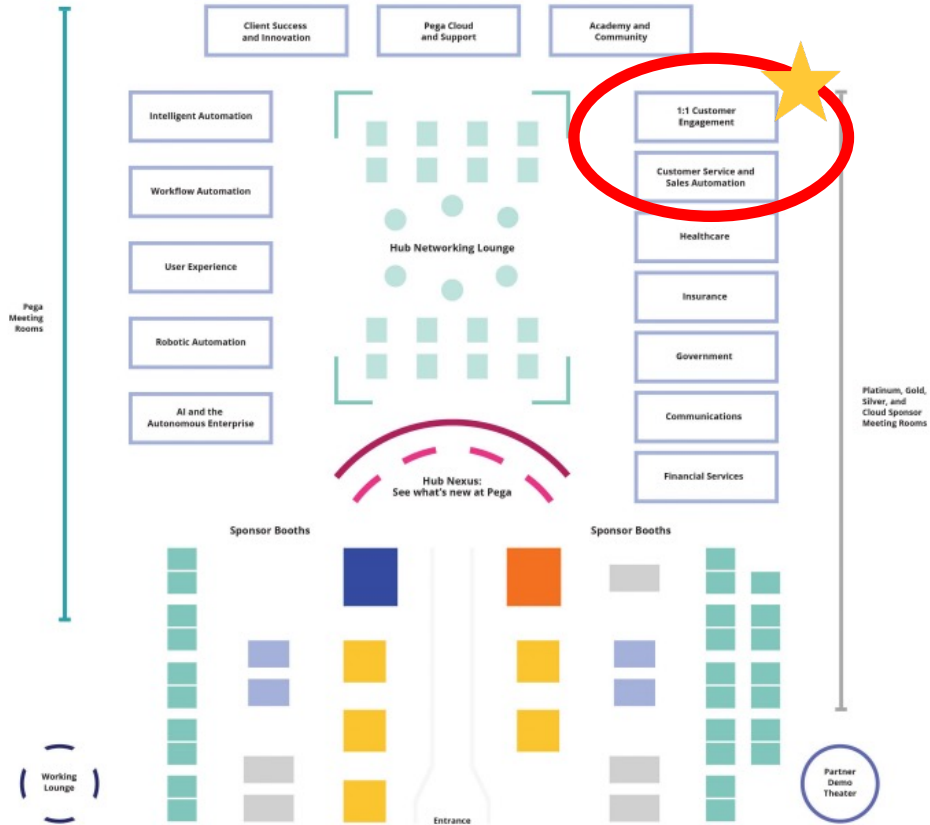
Make the Most out of Your PegaWorld Experience!

CAN'T-MISS SESSIONS

- **Pega & Elevance:** The Future of Customer Service is Autonomous Service
- **Boeing Credit Union**: From MLP to Many Lovable Products: A Three-Year Journey
- **W&W**: Future-Proofing Sales & Service with Pega CRM
- How **Telenet** Elevates Customer Intimacy & Unlocks Business Value
- The Inside Scoop: Product Vision & Roadmap Hotseat (Panel Discussion)
- The Pragmatic Approach to Transforming Customer Service feat. **First Tech Credit Union**
- How **Vodafone** Uses Pega to Deliver a Value-driven Retention Experience in Assisted and Digital Channels

PegaWorld**iNspire**

🏅 =Award Winner

Client Success and Innovation

Pega Cloud and Support

Academy and Community

Intelligent Automation

Workflow Automation

User Experience

Robotic Automation

AI and the Autonomous Enterprise

Hub Networking Lounge

1:1 Customer Engagement

Customer Service and Sales Automation

Healthcare

Insurance

Government

Communications

Financial Services

Pega Meeting Rooms

Platinum, Gold, Silver, and Cloud Sponsor Meeting Rooms

Hub Nexus: See what's new at Pega

Sponsor Booths

Sponsor Booths

Working Lounge

Partner Demo Theater

Entrance

JOIN US IN THE INNOVATION HUB