PEGA

PegaWorld**iN**spire

The Future of Customer Service is Autonomous Service

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Congratulations Elevance Health

Healthcare & Life Science
Pega Innovation Award
Winner 2023

PEGA

Innovation
AWARD

20 23

Most compelling industry transformation innovation
Bringing AI to experience & operations
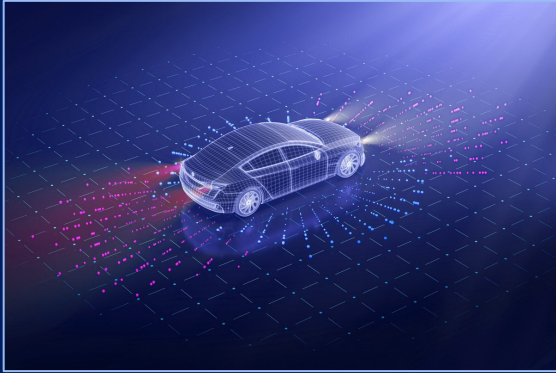with Voice Activated Workflow and Process AI

Agenda

- The future of customer service
  - Autonomous service vision

- Delivering on the future today
  - Where do you start?

- Demo
  - Agent experience

- Elevance Health's journey with Pega
  - The heartbeat of solution central
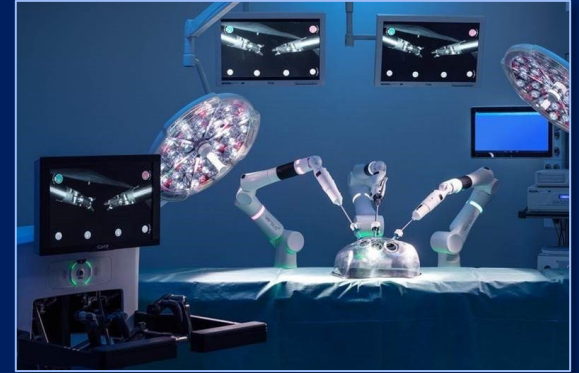
- Q&A

The Rise of Autonomous
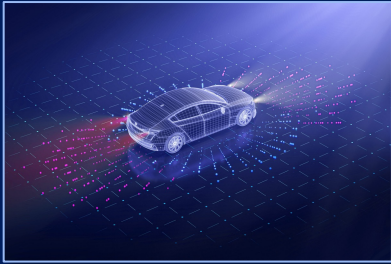

Driving
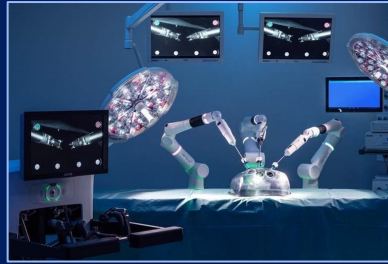

Warehouses & factories

Surgery

The Rise of Autonomous

Driving

Warehouses

Surgery

Customer service?

Vision for Customer Service

Vision for Customer Service

Imagine if...

You could truly understand your customers
Able to predict & act on unique needs

Every agent was your best agent
Co-pilot guides and automates any manual work

Customers did the previously impossible
Effortlessly completing what could only be done in your contact center

Silos didn't exist
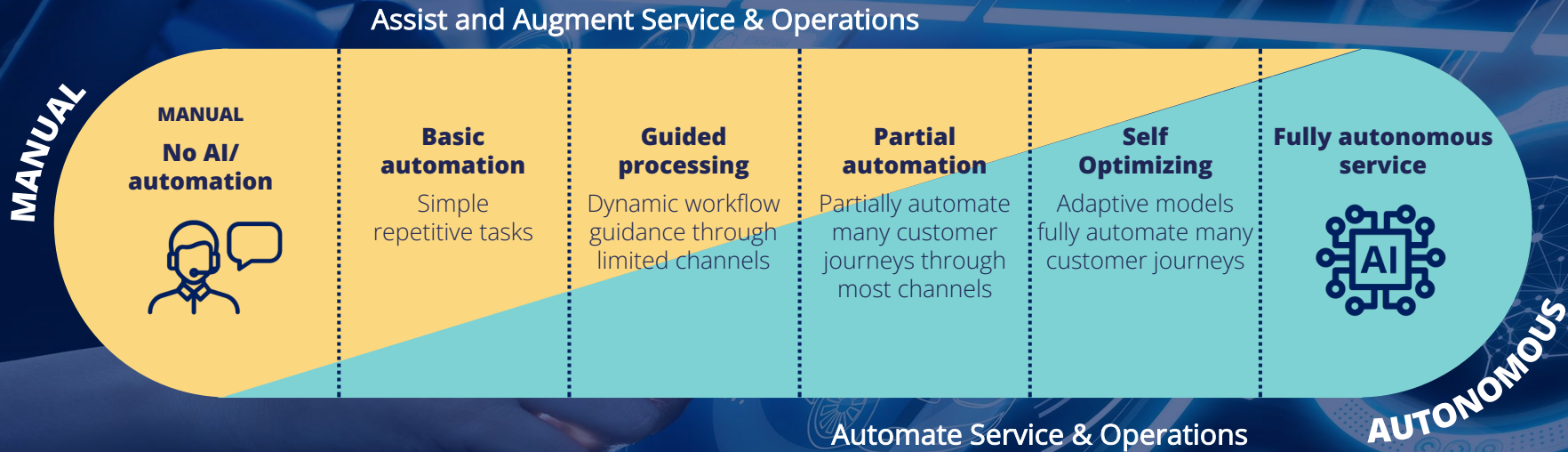Autonomous enterprise seamlessly connected by intelligent automation

Imagine if... you didn't need to forklift your existing systems
Pursue this vision incrementally... accelerating time to value

Autonomous Customer Service
Intelligently guide and seamlessly automate every customer journey

Assist and Augment Service & Operations

MANUAL

MANUAL
No AI/ automation

Basic automation
Simple repetitive tasks

Guided processing
Dynamic workflow guidance through limited channels

Partial automation
Partially automate many customer journeys through most channels

Self Optimizing
Adaptive models fully automate many customer journeys

Fully autonomous service

AI

AUTONOMOUS

Automate Service & Operations

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The Pega Difference... And Why It Matters
Heritage & DNA
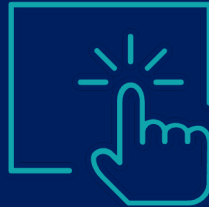
Workflow Automation
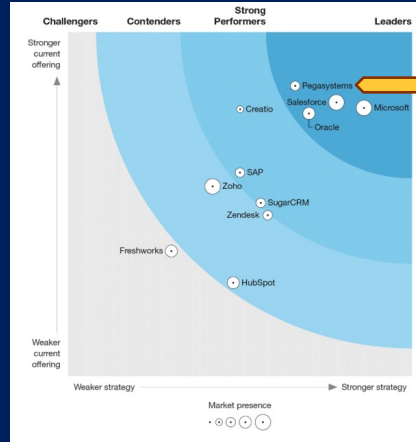
AI-Powered Decisioning

+

Low-code Platform

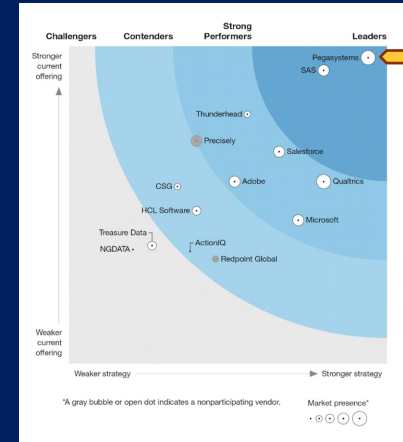# Autonomous Service Requires More Than CRM

Digital Process Automation

Forrester Wave™ Q4 2021

Core CRM Solutions

Forrester Wave™ Q3 2022

Real-time Interaction Mgmt

Forrester Wave™ Q2 2022

"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."*

FORRESTER®
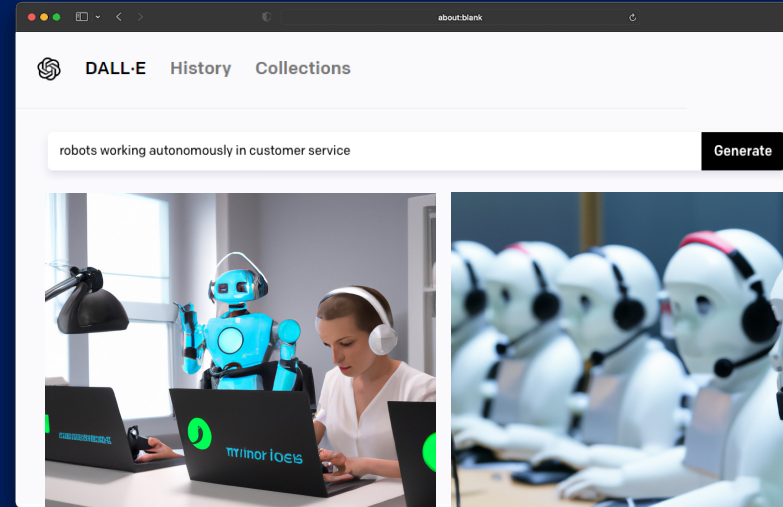
Forrester Wave™: Core CRM Solutions, Q3 2022
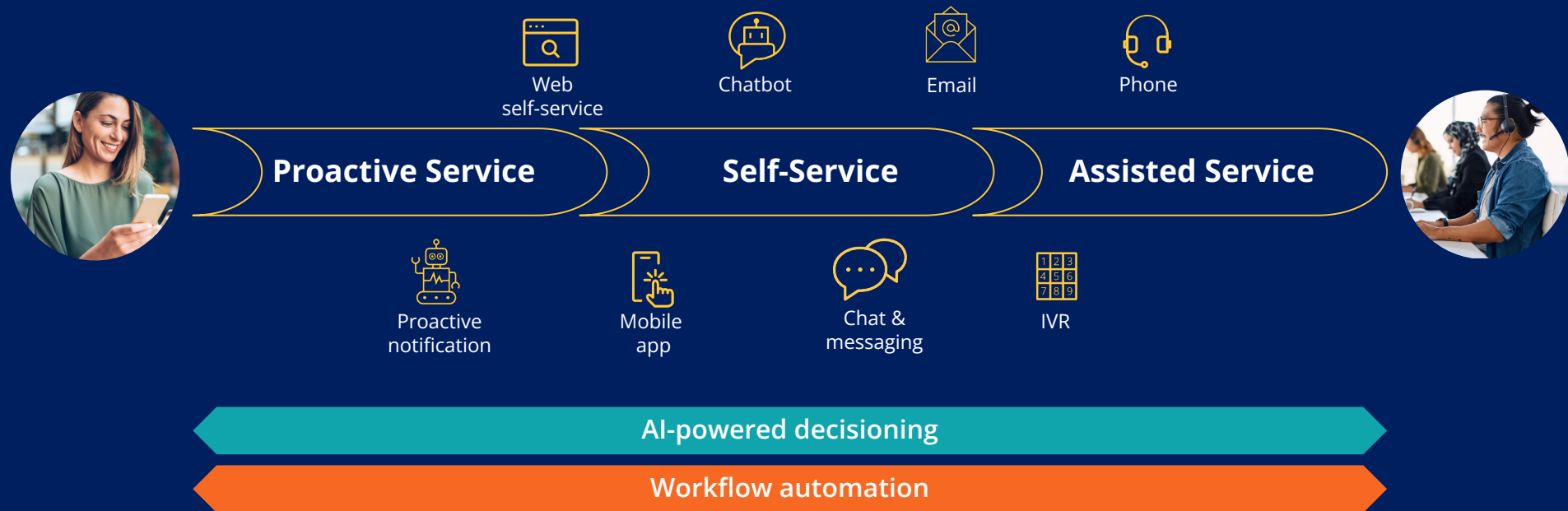
What We Do
To Support This Vision **TODAY**

Intelligently Guide
And Seamlessly Automate
Every Customer Service Journey

robots working autonomously in customer service

AI co-pilot

AI pilot

Intelligently Guide and Seamlessly Automate
Every Customer Service Journey

Proactive Service

Self-Service

Assisted Service

Web self-service

Chatbot

Email

Phone

Proactive notification

Mobile app

Chat & messaging

IVR

AI-powered decisioning

Workflow automation

Challenge: More Journeys End In The Contact Center

Than either companies or their customers prefer

Guide agents to get work done... faster

Understand intent, automate manual work, recommend next best action

☺ | $

Proactive Service

Self-Service

Assisted Service

Make every agent your best agent

Scale across silos

Prevent & contain inbound service inquiries

Through the channel of choice

☺ ☺ ☺ | $ $ $

Proactive Service

Self-Service

Assisted Service

Anticipate and prevent

Right-channel ongoing engagement

Why You Care

Agent Productivity

Customer Experience

Customer Lifetime Value

Cost to Serve

Where Do You Start

to incrementally evolve your transformation

PegaWorld iNspire

With Your **Customer Journeys**... of Course

Proactive Service

Web self-service

Chatbot

Email

Phone

Proactive notification

Mobile app

Chat & Messaging

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Assisted Service

AI-powered decisioning

Workflow automation
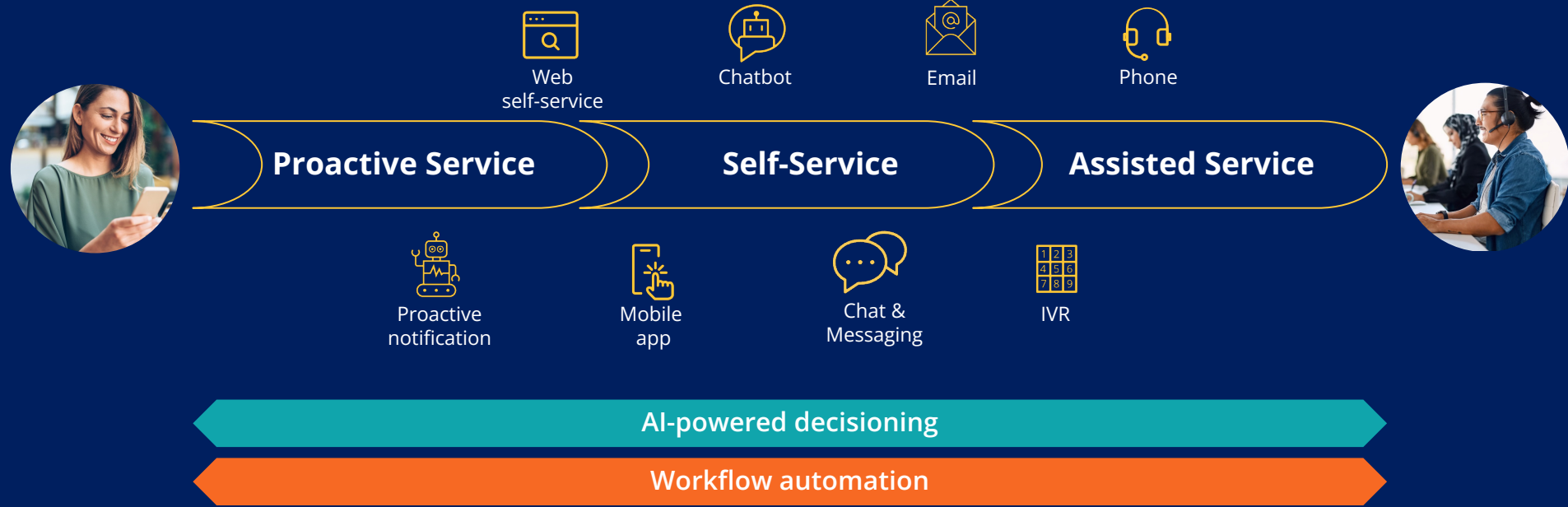
Multiple Maturity Paths

Based on your current state and priorities

Maturity

Inject **more automation** and **more intelligence**
into any customer journey touch point

Workflow automation underpins them all!

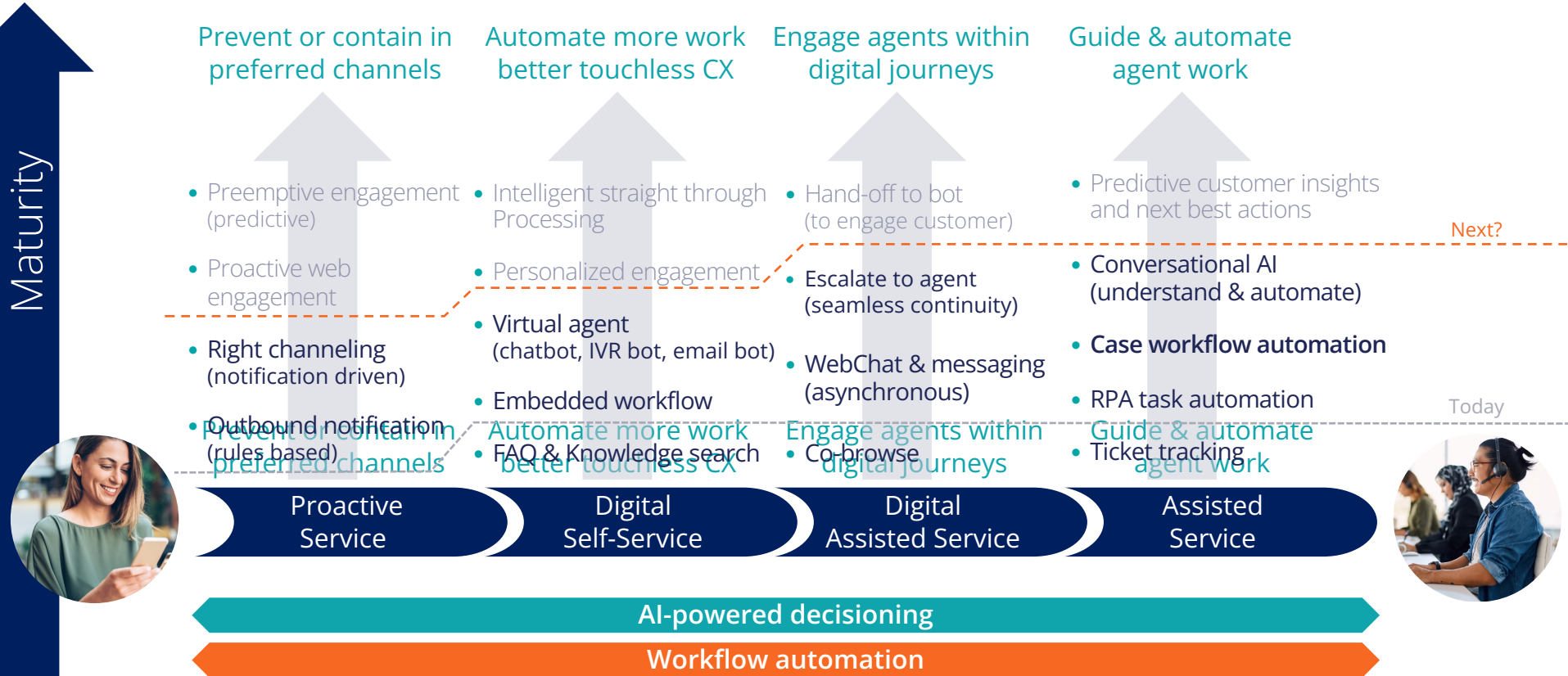| Proactive Service | Digital Self-Service | Digital Assisted Service | Assisted Service |

AI-powered decisioning

Workflow automation

Multiple Maturity Paths
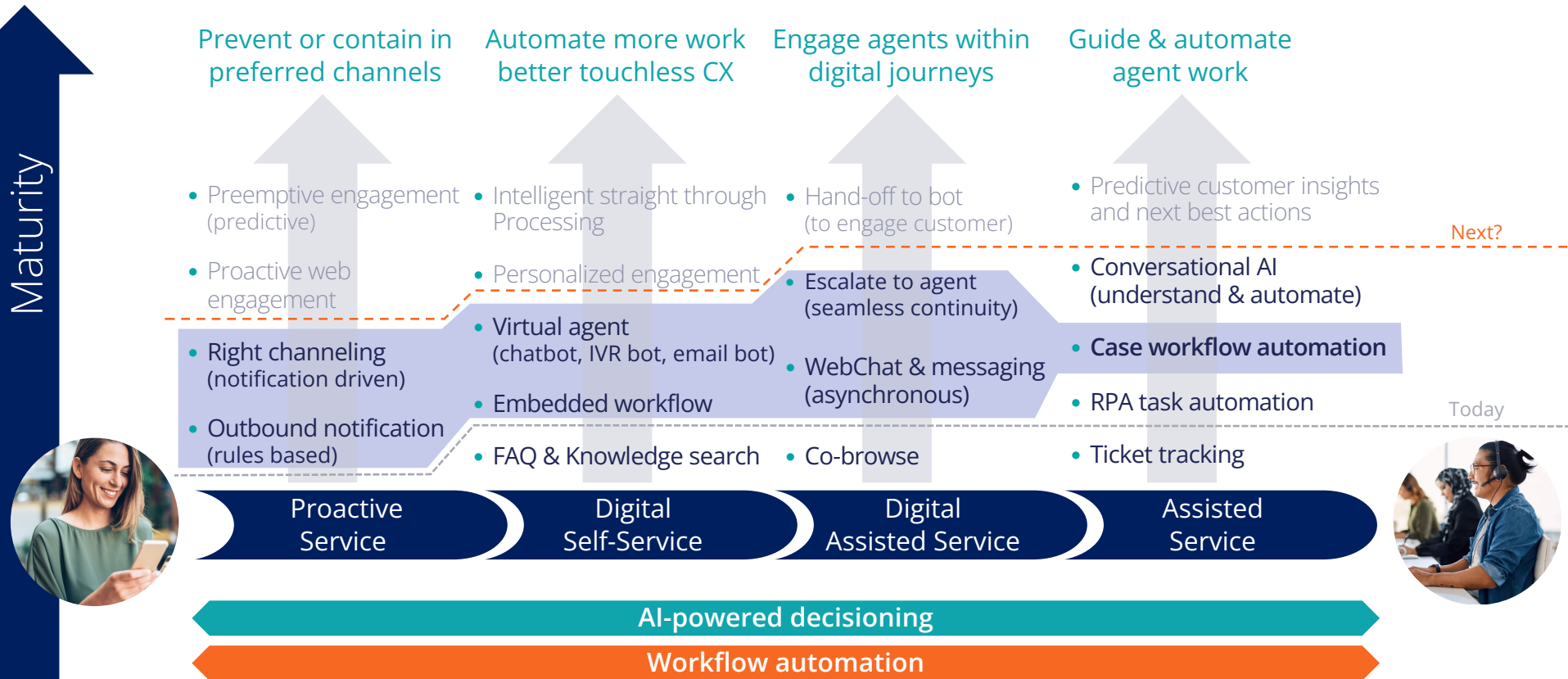Based on your current state and priorities

Maturity

Prevent or contain in preferred channels

Automate more work better touchless CX

Engage agents within digital journeys

Guide & automate agent work

- Preemptive engagement (predictive)
- Intelligent straight through Processing
- Hand-off to bot (to engage customer)
- Predictive customer insights and next best actions

Next?

- Proactive web engagement
- Personalized engagement
- Escalate to agent (seamless continuity)
- Conversational AI (understand & automate)

- Right channeling (notification driven)
- Virtual agent (chatbot, IVR bot, email bot)
- WebChat & messaging (asynchronous)
- **Case workflow automation**

- Outbound notification (rules based)
- Embedded workflow
- Co-browse
- RPA task automation

Today

- FAQ & Knowledge search
- Ticket tracking

Proactive Service

Digital Self-Service

Digital Assisted Service

Assisted Service

AI-powered decisioning

Workflow automation

23

Multiple Maturity Paths
Workflow automation underpins them all

Maturity ↑

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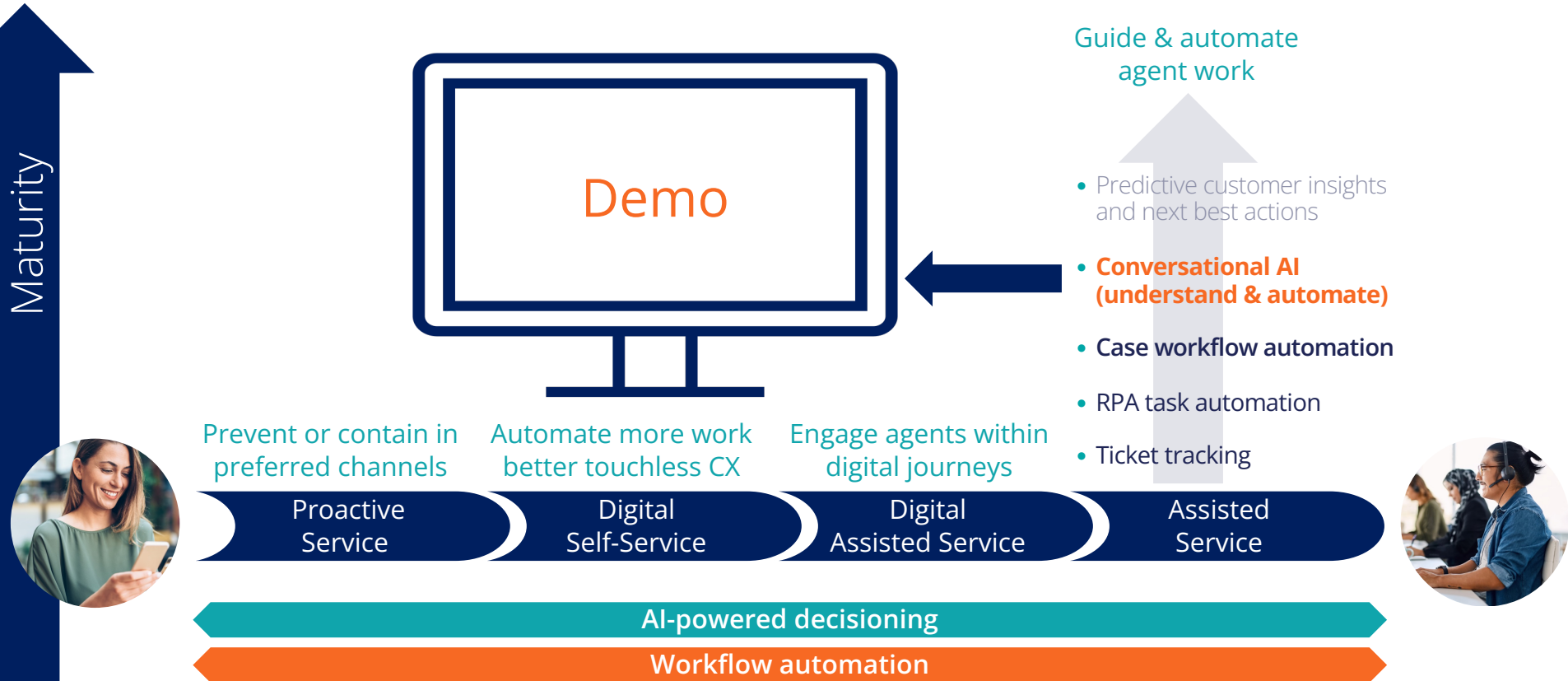- **Case workflow automation**
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Next?

Today

Proactive Service | **Digital Self-Service** | **Digital Assisted Service** | **Assisted Service**

AI-powered decisioning

Workflow automation

Climbing the Assisted Service Maturity Curve

Maturity

Demo

Guide & automate agent work

- Predictive customer insights and next best actions
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Prevent or contain in preferred channels

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Proactive Service

Digital Self-Service

Digital Assisted Service

Assisted Service

AI-powered decisioning

Workflow automation

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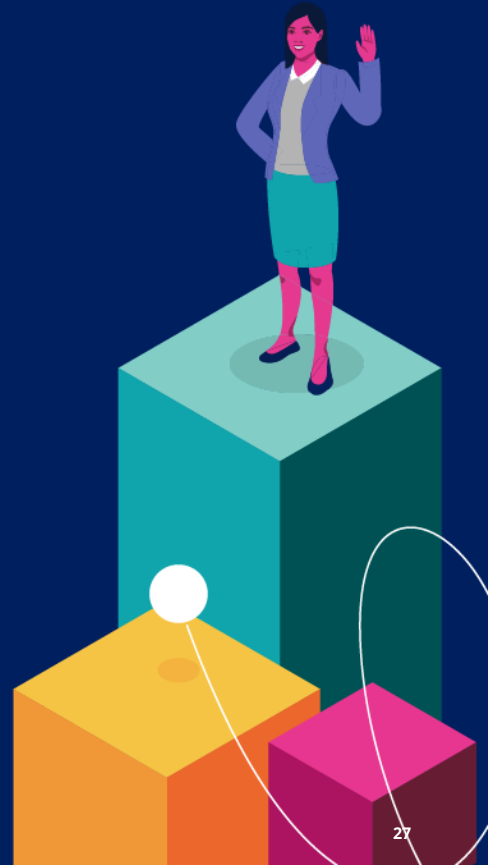
Voice AI Demo Overview

Ms. Beth Miller calls U Plus Health

- Guide agent & automate manual work
  - Confirm authorization request
  - Offer transportation
  - Find new provider
  - Check remaining deductible

- Streamline wrap-up
  - Visual timeline indexed to transcript
  - Transcript annotated with actions
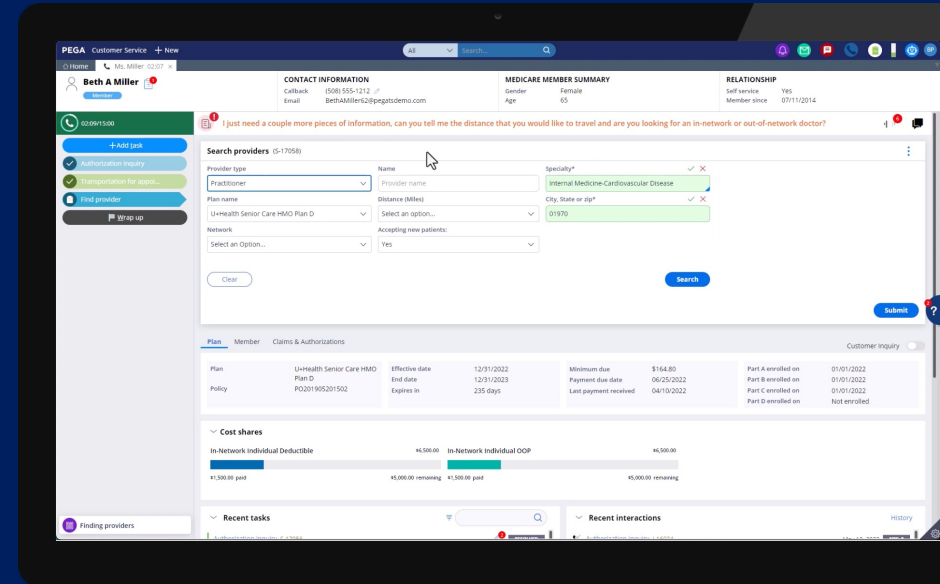
Don't Miss All The Automation... Just Below The Surface

Dynamic scripting

Auto form fill

Transcript

Manage multiple activities

Wrap-up visual timeline

Suggest actions, offers, knowledge articles

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Geeta Wilson
CTO Whole Health, Advocacy
and Provider Platforms

Jenn Wade
VP
Commercial Experience

Member engagement and associate experience cannot be decoupled

Elevance Health has been on a journey to empower members in their whole health, while improving operational efficiencies and enhance member satisfaction

Our industry is dealing with significant workforce challenges:
* The dearth of associates skilled for the new demands of business
* High turnover rates and the associated costs of recruitment and training

Simultaneously, understanding members remains a challenge:
* Healthcare Members in the United States aren't loyal customers
* Customers expect engagement to be convenient, personalized, and responsive to their needs

Customers have become increasingly interested in how companies engage with employees and tend to prioritize doing business with those that value their employees, treat them fairly, and prioritize their well-being

Our Service technology platform strategy needs to focus internally on reducing complexity for our associates as much as it is focused externally on engaging with our members

2x

Net Promoter Score (NPS) impact for companies in the top vs. bottom quartile on employee complexity
Source: MIT Center of Information System Research: "BUILDING BUSINESS VALUE WITH

3.2-point

increase in customer satisfaction for each one-star improvement in Glassdoor employee rating (including for Healthcare)
Source: Glassdoor Economic Research, "The Link Between Glassdoor Reviews and Customer Satisfaction", Published Aug 7 2019

45%

Increase in bottom line profits for companies in the top quartile of employee experience
Source: HBR Research, "How Employee Experience Impacts Your Bottom Line"'

Published Aug Mar 22 2022

Elevance Health & Pega Journey – Looking Back

The Heartbeat of Solution Central

Member experience

Our passion

Key Capabilities

– Guide & automate

– Unify systems

– Collapse silos

Our Pega journey

– How we evolved

– Solution footprint

– Headroom to grow

Elevance Health & Pega Journey – Looking Forward
More automation & intelligence

- Voice Activated Workflow
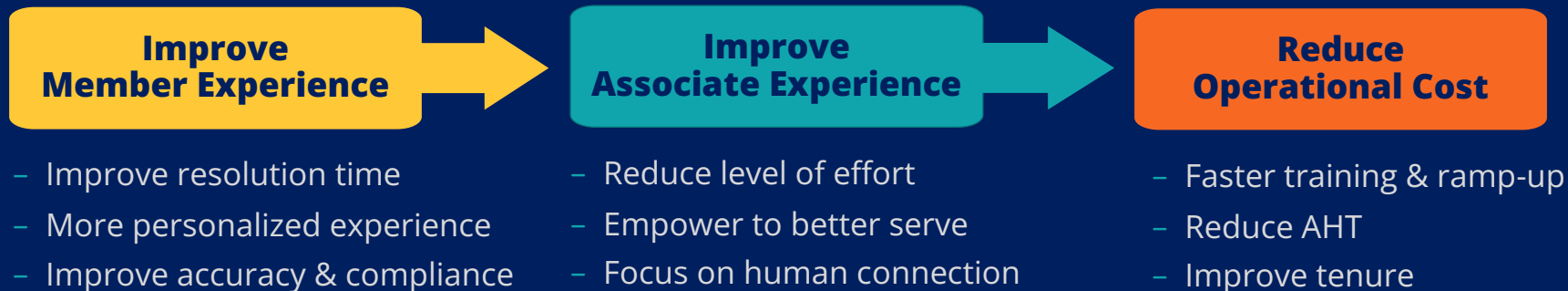
Improve Member Experience	Improve Associate Experience	Reduce Operational Cost
– Improve resolution time	– Reduce level of effort	– Faster training & ramp-up
– More personalized experience	– Empower to better serve	– Reduce AHT
– Improve accuracy & compliance	– Focus on human connection	– Improve tenure

- Approach

Evaluation · · · Pilot · · · Expansion

Approval · · · Production

Agenda

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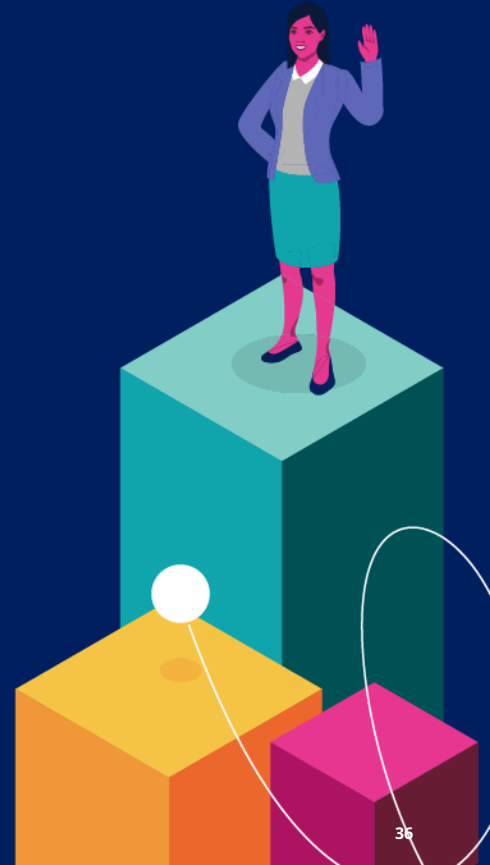 - Autonomous Service Vision

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Remaining Sessions
Not to miss!

12:45 – 1:30

- **Bupa** is Transforming Healthcare as We Know It

2:00-2:45

- **Verizon & Cognizant:** Transforming Customer Experience through AI and Automation

- **US Department of Veterans Affairs** - Taking a Journey-first Approach to Financial Management

6:15-7:00

- **Panel – Product Vision & Hot Seat** for Customer Service, Sales Automation, Customer Engagement, and Robotics

PegaWorld iNspire

Innovation Hub

Client Success and Innovation

Pega Cloud and Support

Academy and Community

Intelligent Automation

1:1 Customer Engagement

Workflow Automation

Customer Service and Sales Automation

Hub Networking Lounge

User Experience

Healthcare

Insurance

Robotic Automation

Government

AI and the Autonomous Enterprise

Communications

Hub Nexus: See what's new at Pega

Financial Services

Sponsor Booths

Sponsor Booths

Entrance

Q&A