



PEGA[®]

Build for Change[®]

What is RPA?

What's the difference between a hammer and a keyboard?



Not a lot – both are used to perform MANUAL work

What's the difference between a hammer and a nail gun?



The nail gun makes the human 20-100x faster
The nail gun becomes a personal robot?

What if – every desktop worker was given a hammer?

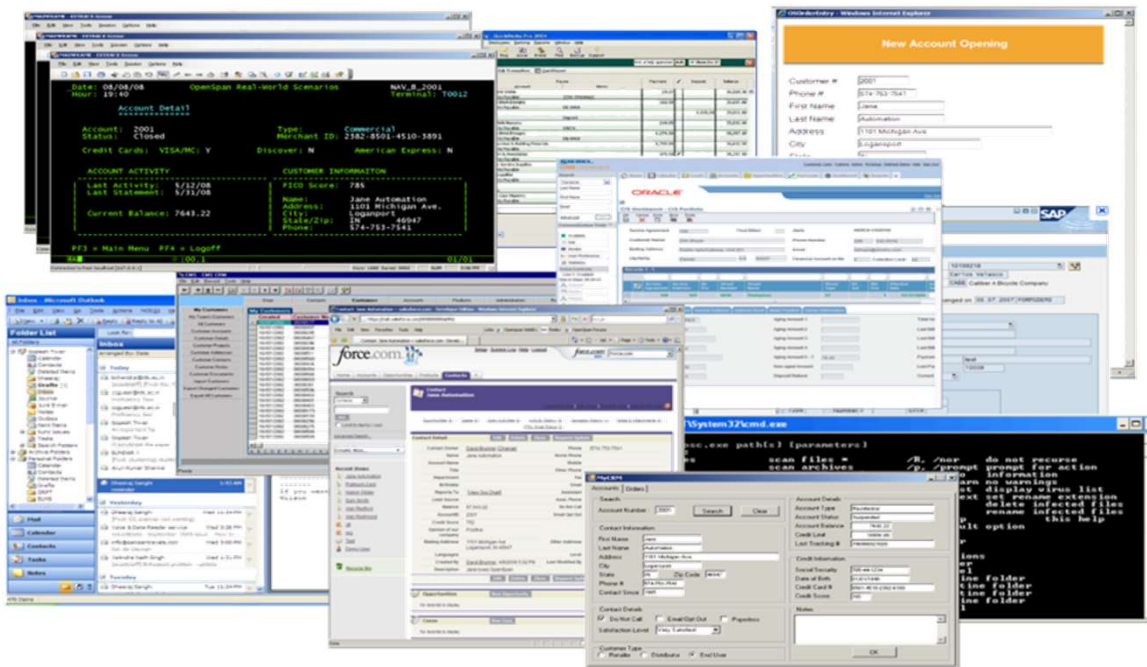


Or better still, give them a personal Robot? Attended RPA (RDA)



What problem is RPA trying to solve?

Many tasks remain manual – Desktop Users lost in a maze of applications



- Cluttered desktop results in:
 - Higher AHT
 - Poor CSAT scores
 - Low FCR (and more rework)
 - Slow new hire onboarding
 - High / costly error rates
 - Complex UIs / variability
- 3rd party and old legacy applications can be closed to integration
- Transformation takes time
- Replacing existing applications slow

But beware of the traps

Up to 50% of RPA projects fail¹

Only 8% of RPA projects have
reached scale²

90% don't think they are
maximizing the capabilities of RPA³

1. *Are you ready for robots?*, EY, 2017

2. *Automation with Intelligence*, Deloitte, 2019

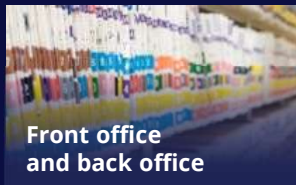
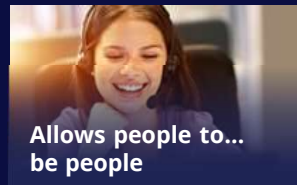
3. *Business Case Planning for Robotic Process Automation*, Infosys, 2019



Scale RPA with a hybrid approach

Start with RPA attended for quick wins

RPA Attended: agility for scale in weeks



- Humans and robots working together
- Exception handling and human decision-making
- Deployed to 100-20,000 robots per enterprise

RPA Unattended: filling in the gaps



- Independent worker bots
- Rules-based work with no exceptions
- Deployed to 10-100 Robots per enterprise

RPA projects often focus on the few tasks where **100%** of the work can be automated...

...but what impact would be achieved if **20% - 50%** of worker desktop tasks could be automated?



Finding the Most Effortless Path

Utilizing workflow details to identify complexity and friction



Example Workflow: Address Change Request

25+

Average number of applications used by an employee



- Friction
- Complexity
- Waste

~1100

Times per day that employees switch between applications

Deploying Attended RPA Bots

- ✓ Reduce manual effort, decrease friction
- ✓ Simplify desktop clutter, swivel chair actions
- ✓ Better focus on interaction, fewer distractions
- ✓ Quick to deploy, easy to manage application
- ✓ Faster results at scale (20 - 20,000 bots)

Popular Use Cases

- Desktop initialization (Start My Day)
- Ready state, 'next work' applications
- Cut, Copy and Paste across applications
- Retrieve / update data from multiple systems
- Automatic notes, wrap-up summary
- Automated / simple search



Forrester TEI Study Economic Impact Report on Pega RPA

- 5 typical instances of rework due to errors saving \$10.9 million
- Average 40 second reduction in AHT on 50 million calls per year
- ALL had tried other RPA vendors before

Delivered \$42 million in total benefits for each 2000 employees automated

Created additional 280 FTEs' worth of capacity per year



Attended RPA – sample of the 100's of tasks can be automated

Screen Pop Applications: extend across multiple apps (demographics, CRM, Billing, etc.).

Upsell/Cross-sell: next best action on additional products

Changing Account Details: add new service, update address, add user, change names, etc.

Add New Account: streamline and automate collect data from other systems....credit, social,

Stop/start Service

Take Payments

Add Additional Features/Products

Close Accounts

Stop Payment

Reinstate Awards Points

Disputes

Password Resets

Data Extraction from Documents

Contextual default data and data verification

Compliance enforcement

Employee Verification

A real FS back office use case of Attended RPA at scale

Process	FTE Before	FTE Save	FTE After	Reduction %	Days
BPAY Disputes	50	20	30		20
Audits	20	10	10		20
Fraud report	7	5	2		25
Fraud listing	70	41	29	29%	40
Equipment Finance	108	28	80	44%	80
197 & 199 Merchant unblocks	13	3	10	33%	20
EBS Account Opening	18	8	10	44%	30
EFT Disputes	10	5	5	50%	20
ATM Disputes	10	5	5	50%	20
International Bank Opening	60	40	20	67%	120
2 way SMS	3	2	1	67%	20

Work of 280 FTE's now done by 130 people
 Agile delivery, Pega Robotics live in 12 weeks, complete in < 1 year
 (total 475 man dev hours (2.5 people on project)
 Now with 1000 Attended RPA bots

Impact of Attended RPA on process times

- implemented 30+ automations in 23 functions across Everyday Banking Services, Business Banking Services, Institutional Banking Services and Home Ownership Services. Savings in effort achieved have ranged from 35% to 98%, with an average saving of ~70%.

Function	# Automations	Volume Daily	Process Minutes (From->To)	Process Effort Saved
EBS - BPAY Traces	3	440	9 min to 4 min	56%
EBS - Audit Confirmations	2	250	2 min to 45 sec	61%
EBS - 004	1	900	4.3 min to 2.5 min	42%
EBS - 2 Way SMS	1	300	2 min to 6 sec	95%
EBS - Traces & Recalls	4	375	7 min to 4 min	41%
EBS - Card & PIN Refunds	1	60	19 min to 3 min	84%
EBS - NSW State Revenue Garnishees	4	1,100	7 min to 10 sec	98%
EBS - SA Fines Garnishees	3	750	7 min to 10 sec	98%
EBS - Personal Loan Applications	1	240	14 min to 4 min	71%
EBS - Ongoing Due Diligence	3	240	40 min to 33 min	35%
EBS - Card Fraud	3		1.5 min to 10 sec	90%
EBS - Online Account Opening	1		7 min to 1 min	84%

Function	# Automations	Volume Daily	Process Minutes (From->To)	Process Effort Saved
EBS - Estates Management	2	100	21 min to 10 min	52%
EBS - Threshold Transaction Reports	3	400	8 min to 4 min	50%
EBS-Employee Benefit Card	1	TBC	8 min to 30 sec	93%
EBS - Credit Card Balance Transfer	1	200	23 min to 5 min	78%
EBS - Data Control	2	280	1 min to 30 sec	50%
EBS - Corporate Cards	1	70	7 min to 30 sec	90%
BBS - WEF Deal Build	1	60	45 min to 22 min	50%
BBS - Doc Prep	1			TBC
BBS -Lending Support Deal Build	1	56	60 min to 30 min	50%
HOS - SGB	1	250	18 min to 1 min	94%
IBS - Account Opening	13	38	45 min to 10 min	77%

No code email automation - NLP (ML and AI)

PEGA Customer Service + New All

Home Ms. Wheeler X

Kelly Wheeler
OWNER

CONTACT INFORMATION
Email kelly.wheeler@example.com

CUSTOMER SUMMARY
Open cases 0

RELATIONSHIP
Churn risk Low

Positive • Category: Auto quote [Hide analysis](#)

Insurance quote bill of sale attached

Wheeler, Kelly (kelly.wheeler@example.com) to: upluscares@example.com
June 02, 2018 03:19PM

I need to add a vehicle to my policy **109186** as of **06/02/2018** can you send over a quote? I purchased a used **Honda Civic** See attached BOS and below for more details on this change.

2014 Honda Civic VIN # **1HGBH41JXMN109** Mileage **56,287**

Also, can you give me an update on when my policy renews? I'm interested in perhaps changing my coverage.
I really appreciate how responsive you have been in all this!

Attachments

W Motor_Vehicle_Bill_of_Sale.docx
[Open](#)

Analysis

Entities
10 entities

Customer
Kelly Wheeler

Attachment: Motor_Vehicle_Bill_of_Sale.docx

Sentiment
Neutral (0.13)

Category
Action > Proof of Insurance

Entities

#Model= **Civic**

#Mileage= **56,287**

#Date= **06/02/2018**

#AccountNumber= **109186**

#Year= **2014**

#VIN= **1HGBH41JXMN109**

#Make= **Honda**

Automate data extraction from images

With Document bots

- Simplifies data extraction
- Pull data from documents to incorporate into automations
 - ABBYY OCR included in all Pega Intelligent Automation solutions
- Assists when working with object and table-heavy documents (e.g. tax forms and onboarding documentation)

22222		a Employee's social security number	OMB No. 1545-0008			
b Employer identification number (EIN)		123-45-6789	1 Wages, tips, other compensation	2 Federal income tax withheld		
c Employer's name, address, and ZIP code		55-5765465	48,500.00	6,835.00		
d Control number		A1B2	3 Social security wages	4 Social security tax withheld		
			50,000.00	3,100.00		
			5 Medicare wages and tips	6 Medicare tax withheld		
e Employee's first name and initial		Last name	7 Social security tips	8 All other tax withheld		
Jane A. Doe		Jane A. Doe	50,000.00	725.00		
123 Elm Street		123 Elm Street	11 Nonqualified plans			
Anywhere, NC 28111		Anywhere Else, PA 17111	12a D 1,500.00			
f Employee's address and ZIP code			12b DD 1,000.00			
			12c P 4,800.00			
			12d			
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
PA	124578	50,000.00	1,535.00	50,000.00	750.00	AW

Form **W-2** Wage and Tax Statement **2017** Department of the Treasury—Internal Revenue Service
Copy 1—For State, City, or Local Tax Department

The image features a dark blue, monochromatic background of a complex circuit board. The board is covered in intricate patterns of copper traces and numerous circular solder points. In the center, the words "DIGITAL" and "REVOLUTION" are prominently displayed in two rows. The letters are large, bold, and have a three-dimensional, metallic appearance, as if they are raised from the surface of the board. The lighting creates highlights and shadows on the letters, giving them a sense of depth and texture. The overall aesthetic is futuristic and technological.

DIGITAL

REVOLUTION



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