



Breaking the mold:

Transforming customer service with
AI and workflow orchestration



Why Incremental Improvements Are No Longer Enough

Customer service isn't just broken – it's operating on an entirely outdated paradigm while customer expectations have rocketed into the future.

Let's face it: The same customers who can't resolve a simple insurance claim are tracking pizza deliveries with real-time precision (a relatively trivial task). It's no wonder **77%** of consumers believe companies should invest in CX technology, yet 69% think organizations prioritize profit over customer experience – a disconnect that costs businesses **\$75 billion** annually in lost revenue.

Think about it: Your customers are living in 2025, but your service infrastructure is stuck in 2010. And that gap? It's widening by the day.

Many enterprises remain laser-focused on the bleeding edge of technological possibility while neglecting the fundamental architecture of how work actually gets done.

Yes, everyone's talking about AI and automation – but these transformative technologies remain frustratingly out of reach for organizations struggling with the more straightforward challenge of orchestrating work across fragmented systems.

One thing is certain: The customer is always right. And in this case, their expectations will dictate the winners and losers in the new world of service.

There is no choice but to adapt – or be left behind.



Where Traditional Approaches Fall Short

Before we unpack how organizations can transform service, let's agree on a few basics. Today's consumers are highly informed and empowered, expecting not just quality products but personalized, seamless interactions across multiple channels. They demand:



Instant gratification

Immediate responses and solutions



Transparency

Proactive communication about their requests



Personalization

Tailored experiences that recognize their history and preferences



24/7 availability

Support whenever and wherever they need it

Despite significant investments, companies consistently fall short of these expectations. Self-service options frequently fail, forcing consumers to endure long waits and inadequate service – highlighting the widening chasm between what customers expect and what organizations deliver.

The challenge for customer service leaders is twofold:

1

Reimagine internal processes and systems

to accelerate and streamline workflows

2

Reform customer-facing platforms

to exceed what they're capable of today – even in the best-case scenario

While most leaders understandably focus on the front-of-house customer experience (after all, those customers are abandoning self-service portals, waiting on hold, and ultimately choosing new providers), this overlooks a critical development: the right architecture can get more service work done without ever reaching the contact center or an agent's desk.



BEYOND AUTOMATION:

Engineering the Self-Driving Service Experience

Imagine a future where over 95% of issues – no matter the complexity – are self-solved, with half resolved proactively through the power of statistical AI and risk modeling. This isn't science fiction; it's the autonomous service revolution that's already underway.

Autonomous service represents a significant evolution beyond assisted and traditional self-service, shifting from channel and product-centric approaches to prioritizing the customer journey. It offers varying levels of autonomy in service interactions:

Supporting current practices

Fully automating service requests

Pre-emptively resolving issues before they occur

All by using real-time AI, intelligent automation, and event/pattern detection.

This advancement allows customers to receive high-quality service through digital channels that historically have underperformed. It also enhances agent interactions, enabling quicker and more meaningful resolutions – a win for both customers and businesses.

But for many organizations, knowing this future state only serves to illustrate how far they are from it. The good news? The road to autonomous service is made far more manageable by developments in AI for process re-engineering and transformation.



Why Case Management Is Your Secret Weapon

Consider this thought experiment: Two cities are trying to make their subway system run faster and more consistently. One focuses on the trains themselves – replacing old, run-down cars with newer, more comfortable versions. The other tackles the underlying infrastructure – the tracks, the scheduling software, the fare systems.

Which one is better set up for long-term success?

While the first city may see an immediate boost in satisfaction, it's likely to be back to the drawing board in short order. Old tracks, inadequate scheduling, and cumbersome fare payment put a cap on the benefits gained from gleaming new trains – and might even cause them to degrade prematurely.

What does this have to do with customer service transformation? True transformation doesn't come from slapping a new AI tool on top of broken processes. It starts by rethinking how work gets done.

If there's only one thing you take from this whitepaper, it should be this: The core goal of service transformation is to streamline and orchestrate work from start to finish across every touchpoint. You can't optimize until you organize. And you can't organize with disparate systems and outdated technology that yield cumbersome processes and poor visibility.

Think of case management as the central nervous system of your service operation – coordinating every action, processing every input, and ensuring the right response at exactly the right time. It's not just another layer of technology; it's the foundation that makes everything else possible.



What is AI-Powered Case Management?

Case management is a software-based approach to getting work done.

A case represents the work an organization undertakes to achieve a specific outcome, such as processing an auto insurance claim or opening a new bank account. Completing these cases involves various tasks and processes, both planned and unplanned, that drive the case toward resolution.

Streamline steps and processes

Reduce or eliminate manual work

Orchestrate and prioritize cases across the enterprise

Execute entire workflows autonomously

Unlike ServiceNow's approach, which often requires rebuilding workflows for each channel, Pega's unique case management architecture delivers four critical advantages:

- 1 **Build once, use everywhere** – Cases can be built once and reused across channels instead of rebuilding workflows for self-service, chat, phone, and so on.
- 2 **Incremental transformation** – Contact centers can implement one workflow/case at a time; testing, capturing value, and improving processes as they go rather than waiting for a monolithic deployment.
- 3 **Seamless handoffs** – Cases can be passed between front office and back office, between humans and systems and AI, serving as a single source of truth for any given work item.
- 4 **Integrated intelligence** – Cases seamlessly integrate automations and intelligence across steps and stages, providing a structure for further investments in AI and other systems.

Perhaps most critically, this architecture means enterprise leadership can govern AI systems in ways that are impossible with other approaches. Regulators and auditors won't simply trust that an AI agent will "do the work" without knowing precisely what work is being done, when, how, and by whom. A case structure clearly lays out work in defined steps and stages, giving AI agents – as well as human operators – a roadmap that is repeatable, scalable, and auditable.



Identifying High-Impact Opportunities

After establishing a solid case management foundation, contact centers can strategically implement AI and automation to amplify their capabilities.

Focus on these four key areas where AI and automation deliver measurable value:

1

Process Intelligence and Visibility

Analyze end-to-end processes and uncover areas for improvement using AI-powered process mining. One American insurance company used this approach to predict and circumvent SLA slippage for 80,000 cases and adjust priorities based on AI insights.

2

Intelligent Automation Opportunities

Target repetitive tasks that consume agent time. A multinational bank automated account information updates and compliance checks, reducing average handling time by 120 seconds per call while decreasing error rates from 29.7% to just 2%.

3

AI-Enhanced Decision Support

Implement real-time guidance systems that augment agent capabilities. Elevance Health demonstrates this by using Voice AI to automatically detect call intent, recommend workflows, and populate forms – significantly reducing complexity for agents while ensuring compliance.

4

Omni-Channel Experience Optimization

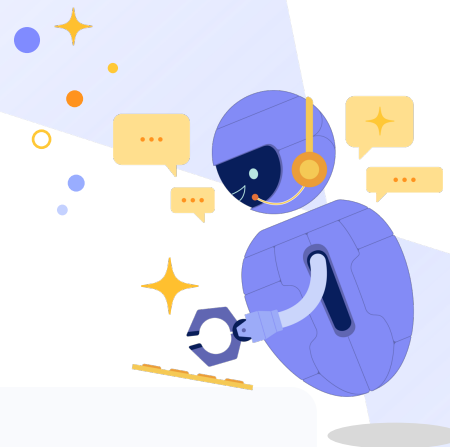
Create a unified experience across channels through consistent business rules and process logic. Healthcare providers using Pega's omnichannel solutions report improved first-call resolution rates and reduced operational costs through AI-powered routing and self-service options.



FROM VISION TO VICTORY:

Your 90-Day Transformation Blueprint

Select opportunities that align with both operational goals and customer needs, while ensuring measurable outcomes at each step:



1

Measure Current State

Analyze handling times and identify high-volume processes

Example: Contact centers typically spend 13.5% of agent time on post-call documentation—a prime target for automation

2

Start with Quick Wins

Focus on obvious pain points

Example: Implementing automated interaction summaries can immediately reduce post-call work while improving accuracy

3

Validate and Optimize

Measure success through control groups and key performance indicators

Example: Organizations implementing AI-powered interaction summaries report 95% accuracy while reducing post-call work by 40% compared to control groups

4

Scale Strategically

Build on successful implementations

Example: Organizations using Pega's AI tools report saving up to \$4 million annually by simplifying agent experiences

Addressing Common Objections

"But we've already invested heavily in our current systems"

Pega's architecture is designed to work with your existing investments, not replace them.

Our layer cake approach means you can modernize incrementally while preserving previous technology investments.

"AI implementation sounds risky and complex"

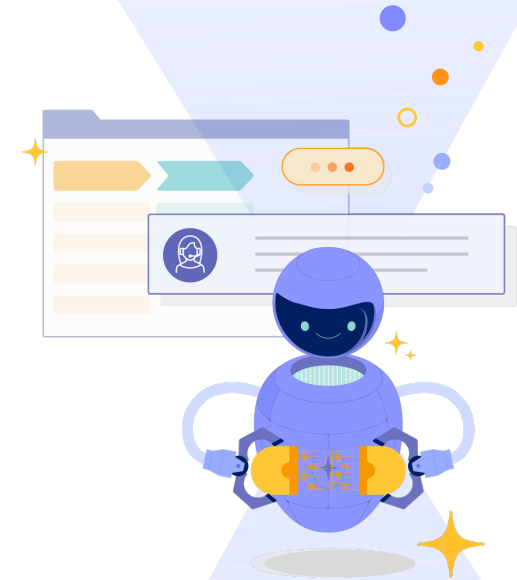
Unlike black-box AI solutions, Pega's approach provides complete transparency and governance.

Every AI decision is traceable, explainable, and adjustable – critical capabilities that ServiceNow and other competitors struggle to match.

"Our processes are too complex for automation".

Complexity is precisely where Pega shines. Our case management foundation was built specifically for intricate, exception-filled processes that other systems struggle to handle.

While competitors focus on simple, linear workflows, we excel at managing the complex, branching scenarios that define real-world service.



Reimagine Your Workflows - Fast

When it comes to translating the recommendations of this paper into action, it may be unclear exactly where to start. Business transformation has long been a euphemism for months of planning, budgeting, input gathering, stakeholder alignment, and vendor management.

But what if you could:



Define

your business challenge clearly and concisely



Discover

existing processes instantly as AI analyzes your legacy systems



Generate

optimized workflow designs that combine industry best practices with your unique needs



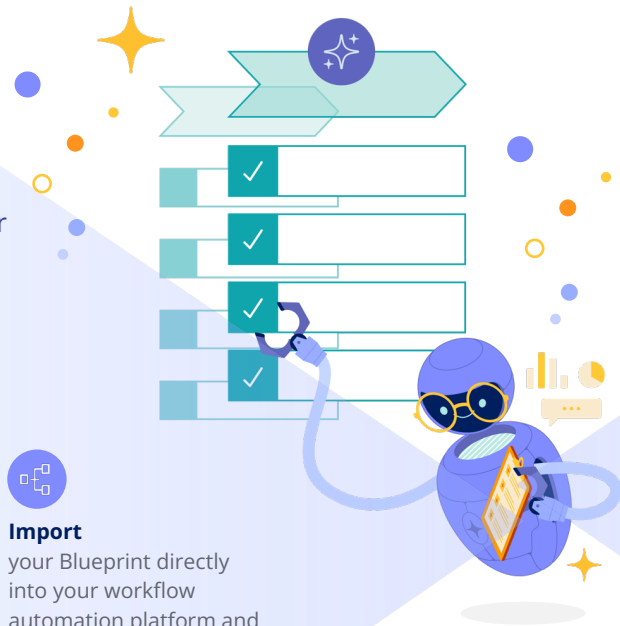
Design

your enhanced workflow collaboratively, leveraging AI-suggested components while maintaining full control



Import

your Blueprint directly into your workflow automation platform and see immediate results



The work of defining your first case templates can be done in minutes using AI-powered process design that combines deep industry knowledge with cutting-edge technology. The output is an actual file that you can download into your customer service platform for immediate use.

You can try your hand at building your first new workflow – or your first hundred – right now, for free, using Pega GenAI Blueprint on pega.com/blueprint

The Service Revolution Is Already Here

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As customer expectations continue to evolve at breakneck speed, the organizations that will thrive are those that act now to lay the groundwork for autonomous service. Through strategic implementation of case management, augmented by AI and automation, companies can create a future where exceptional service isn't just an aspiration – it's business as usual.

The service revolution isn't coming – it's already here. Organizations that cling to traditional service models aren't just falling behind; they're actively training their customers to look elsewhere. Every day of delay represents thousands of suboptimal customer interactions that can never be recovered.

Your competitors are already exploring this path. The question isn't whether to begin this transformation, but whether you'll lead or follow.

