SALES AUTOMATION

Pega Sales Automation for Financial Services

Product Overview

7.4

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Pega Sales Automation for Financial Services

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1 Product overview

Typical sales force automation applications in the banking industry do little more than capture data and are largely disconnected from enterprise systems and the actual sales process. With these typical applications, managers and representatives often end up using different systems and their own manually created spreadsheets, reports, and forecasts. The result is that sales methodologies are inconsistently applied, and the selling process cannot be adjusted to accommodate variations such as business units, geography, the customer, sales team, or the sales representative.

Pega Sales Automation for Financial Services optimizes the efficiency and effectiveness of your entire sales organization at every stage in the sales lifecycle. Sales Automation for Financial Services offers Artificial Intelligence based guidance, process automation from lead to fulfillment, and gives business users the flexibility to adapt your sales process. With Pega, insights find your reps and managers; you can quickly standardize and automate the sales process, and provide management with insights across multiple market segments, products, team members, geographies, accounts, and channels.

- Guided selling via Artificial Intelligence **-** Through a blend of predictive analytics, automated decisioning and business rules that you can configure, Pega systematically recommends the next best action to take, offer to make, and proactively drives these insights to reps throughout the sales cycle.
- Sales process management **-** Industry-leading process and workflow management ensures leads and opportunities are intelligently routed, tracked, and progressed and the end-to-end sales cycle is optimized with errors removed. Financial needs are gathered through the opportunity process and tied to the products that are recommended and sold.
- Reporting and forecasting - Dashboards and forecasts offer a real-time view into your team's pipeline and forecasts as well as what it will take to make quota. Easily modify reports to give you the actionable insights you need, exactly when and where you need them.
- Mobility and collaboration - Empower your teams to be productive everywhere by seamlessly delivering the sales experience on any device, including tablets and smartphones – on- or off-line. Through Pega social capabilities - Pulse and Co-Browse- encourage reps and managers to collaborate with customers and one-another.
- Quick build and specialization of applications - Built on the world leading Pega Platform, Pega Sales Automation for Financial Services allows you to manage your enterprise's complexity, develop and change applications 7x faster than Java coding, and configure and run ultimate variety of sales process or instances on one application platform. The Pega Platform also allows you to maximize existing technology investments to ensure the fastest implementation time by easily integrating with your legacy systems.
- Deployment choices - Choose the best deployment option for your business with Pega Cloud, your cloud or on premise. Effectively manage your computing resources with

confidence using Pega Platform, an application that is proven to securely scale to meet the needs of the world's most demanding organizations.

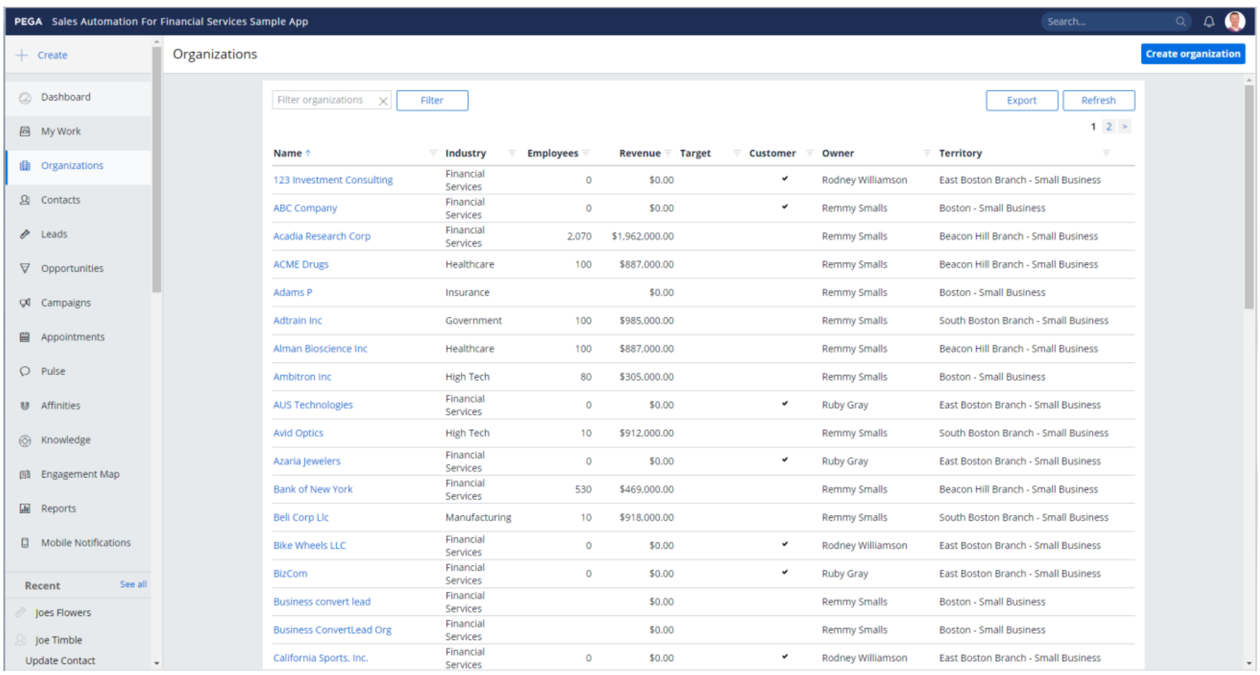
2 High-level functionality

Note: Features marked with an asterisk (*) in this section are optional. Additional license fees may apply.

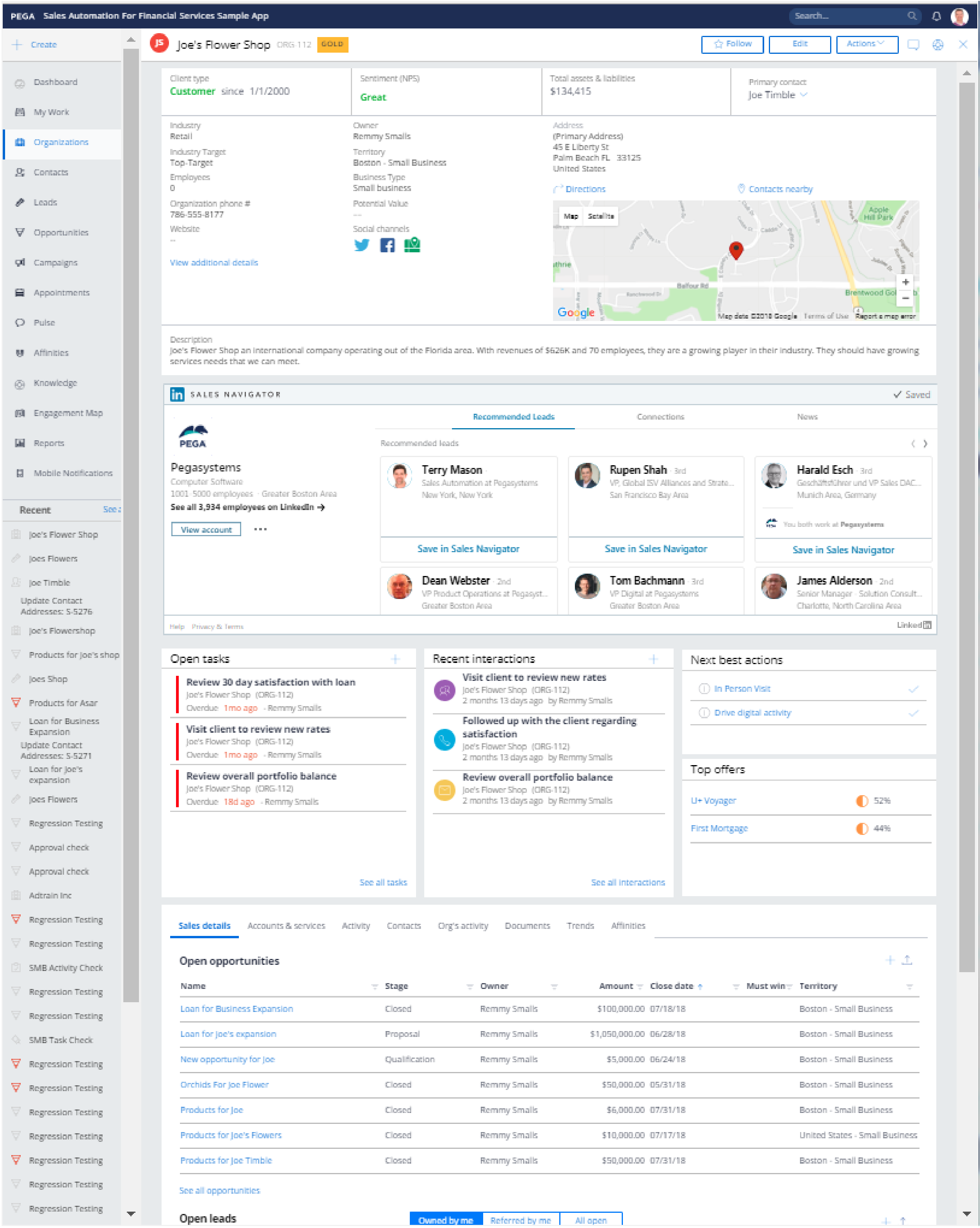
Account and contact management

Pega Sales Automation for Financial Services provides a 360-degree view of Organizations, Accounts, and Contacts, including current and past deals, communication history including emails and appointment, documents, and relevant social insights. Additionally, they provide full insight into account holdings and services as well as active service interactions and cases. You can leverage the application's built-in duplicate detection and external data enrichment services to maintain data refresh rates and accuracy.

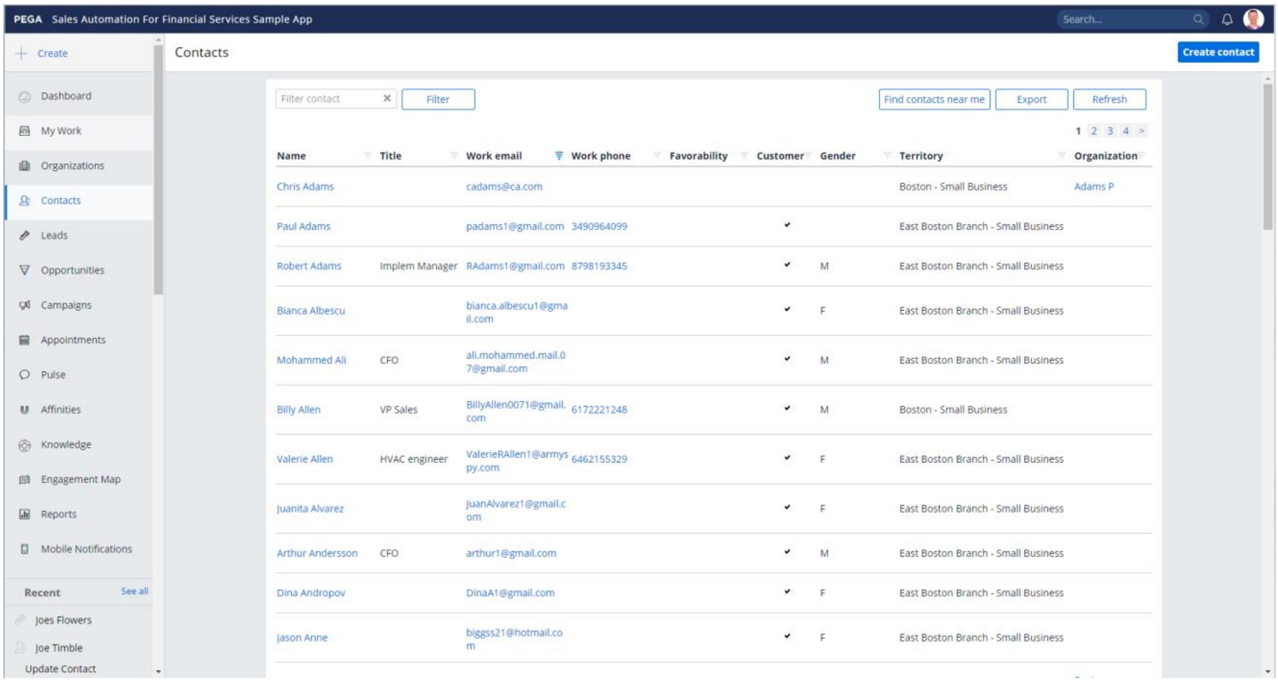
Organizations home



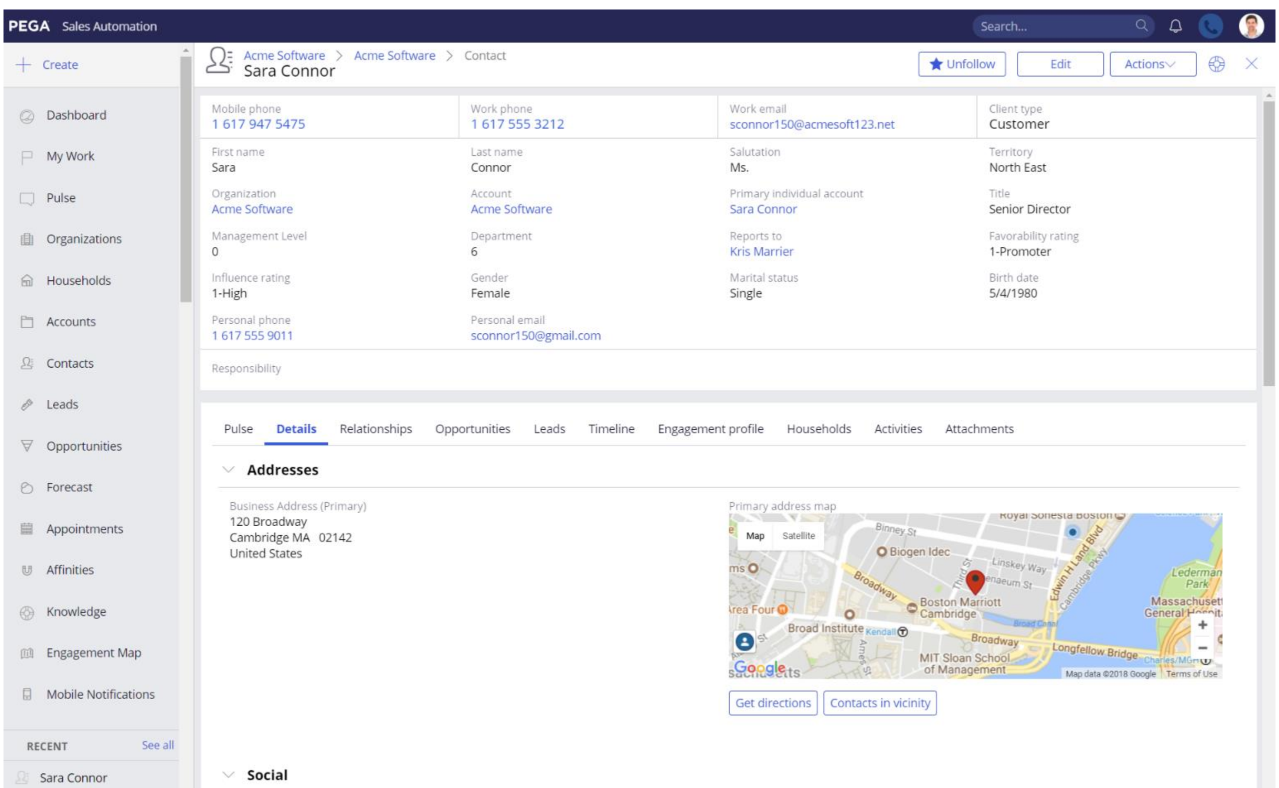
Organization detail



Contact home

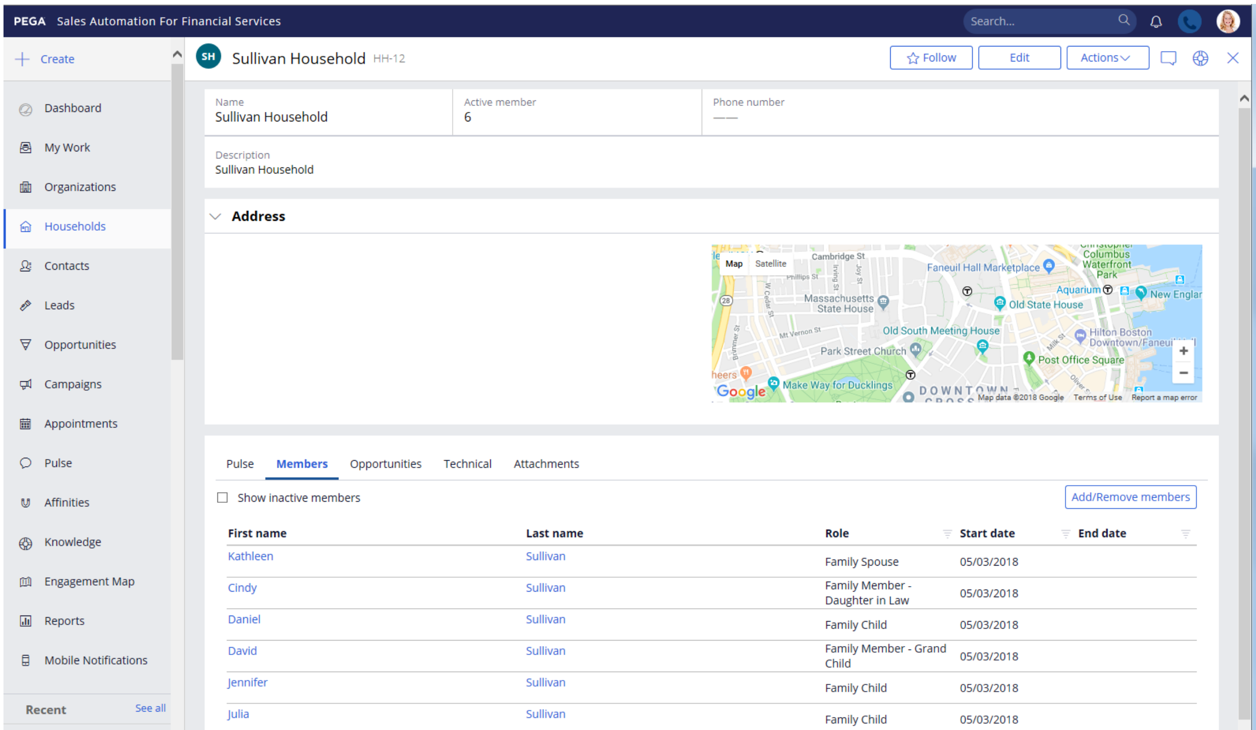


Contact detail



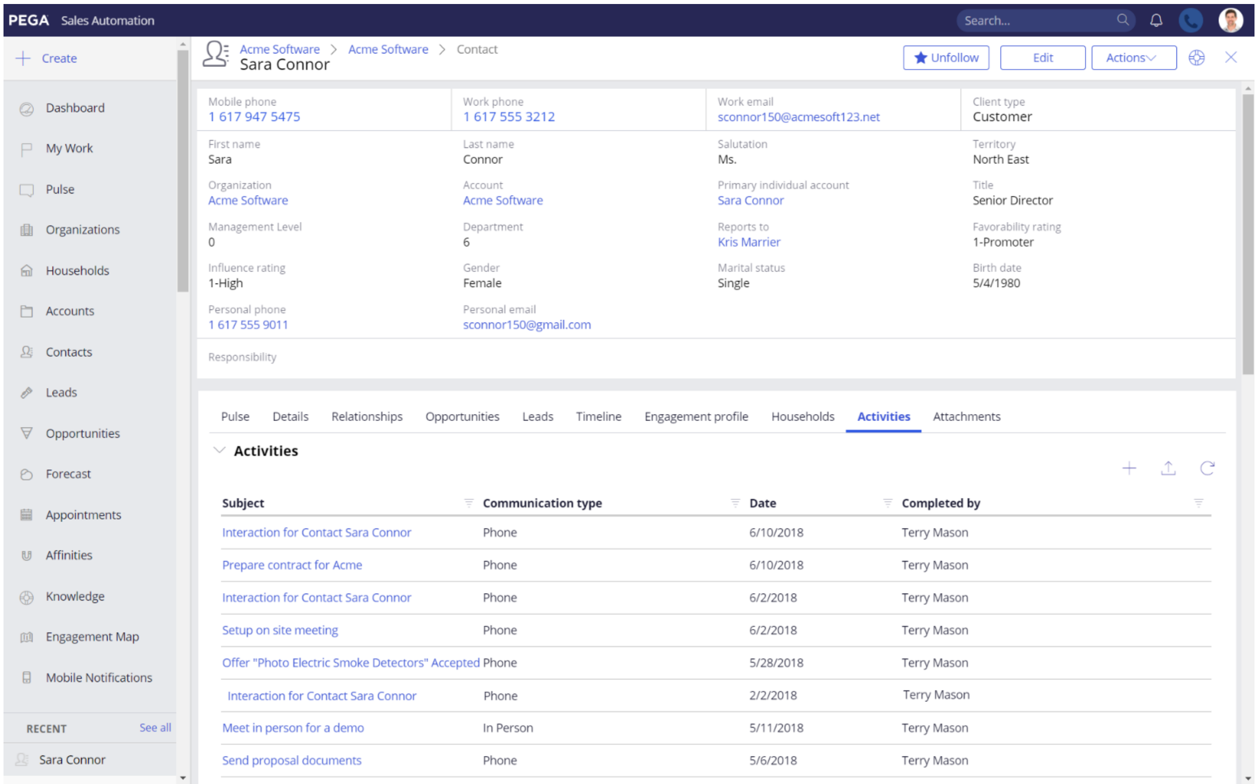
Households

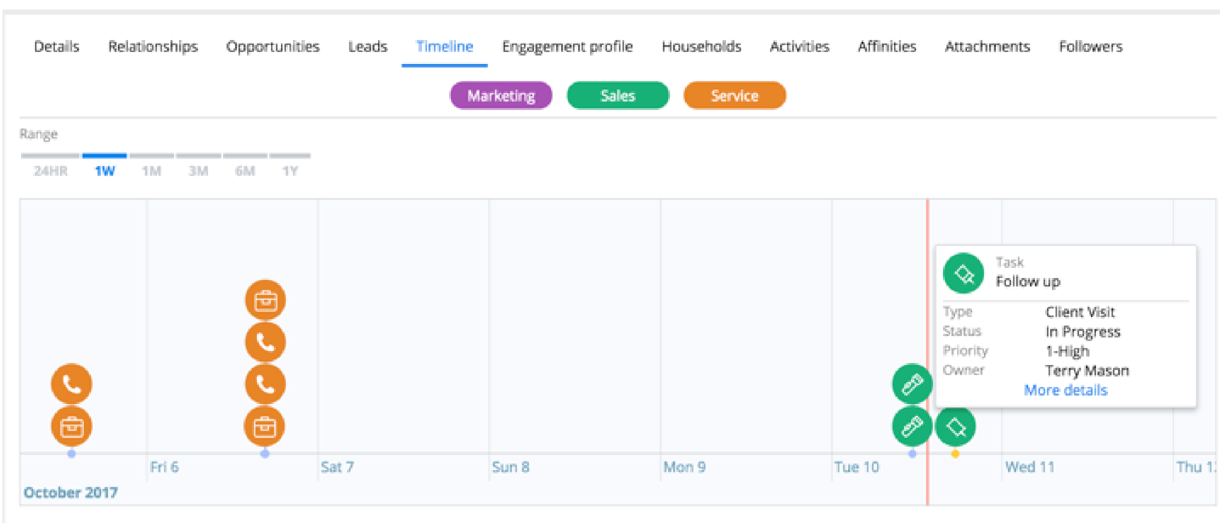
Households associate individuals into “groups.” These associations allow for modeling efficient upsell use cases for a household and provide for efficiency in consolidated mailings. Financial accounts and net worth can be aggregated at the household level as well.



Activity management

Activity management allows sales organizations to track and monitor important customer communications and tasks. Sales reps and managers can create activities to capture details and outcomes of customer interactions including phone calls and meetings. The timeline view gives a graphical representation of all customer interactions in one view. Keep the sales team aware of customer interactions by associating activities to the relevant account, contact, or opportunity. Sales reps can view their upcoming tasks by priority, and managers can delegate tasks to their team.

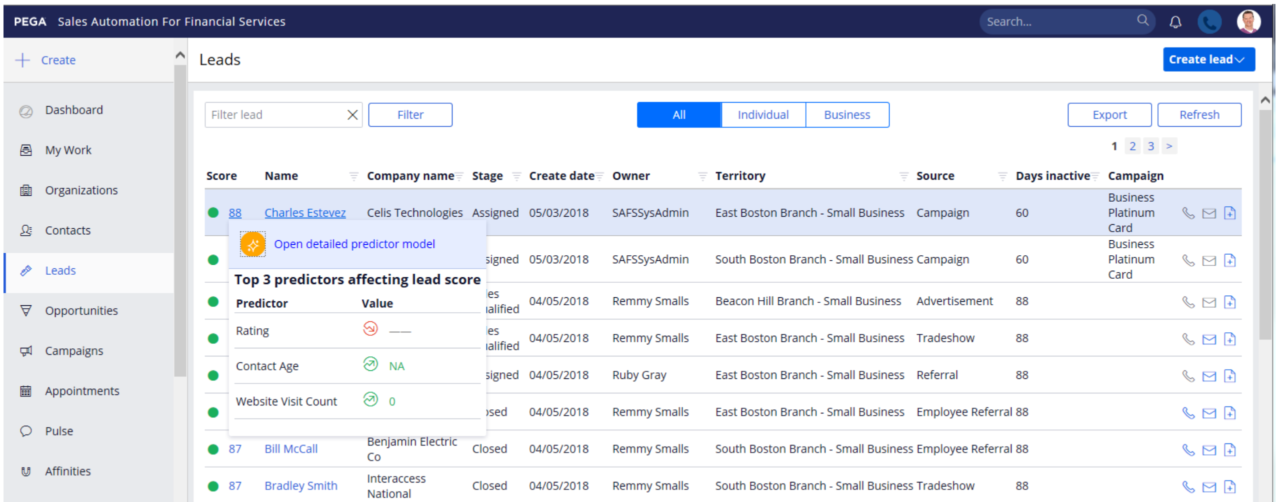


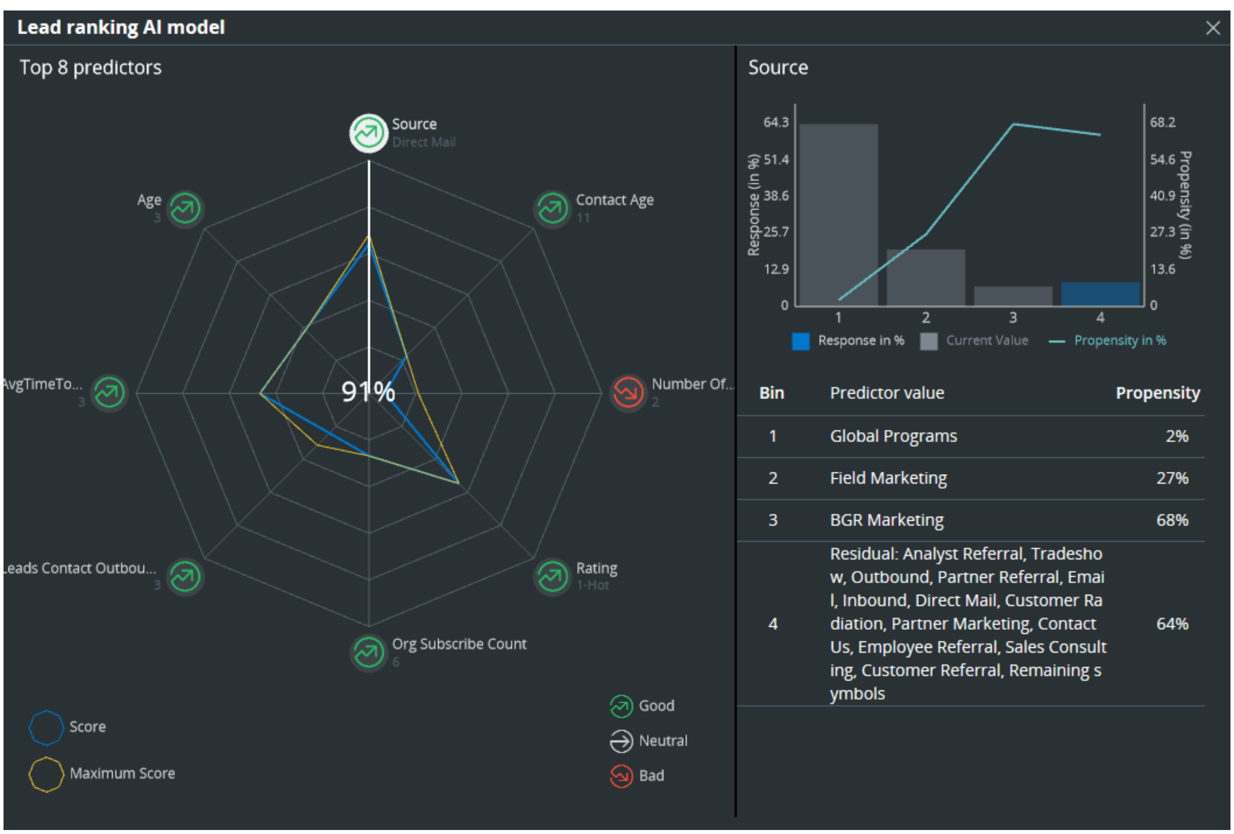


Lead management

Pega Sales Automation for Financial Services enables organizations to manage leads from initial capture and routing, through the qualification process, and ultimately though conversion to an opportunity. You can source leads via bulk import, Web forms, campaigns, manual entry, or via third party from an API. Lead management dashboard widgets offer insight into lead conversion rates and where leads fall out of the qualification process. New AI lead scoring uses adaptive models to predict the likelihood that a lead will convert into an opportunity.

Leads home page



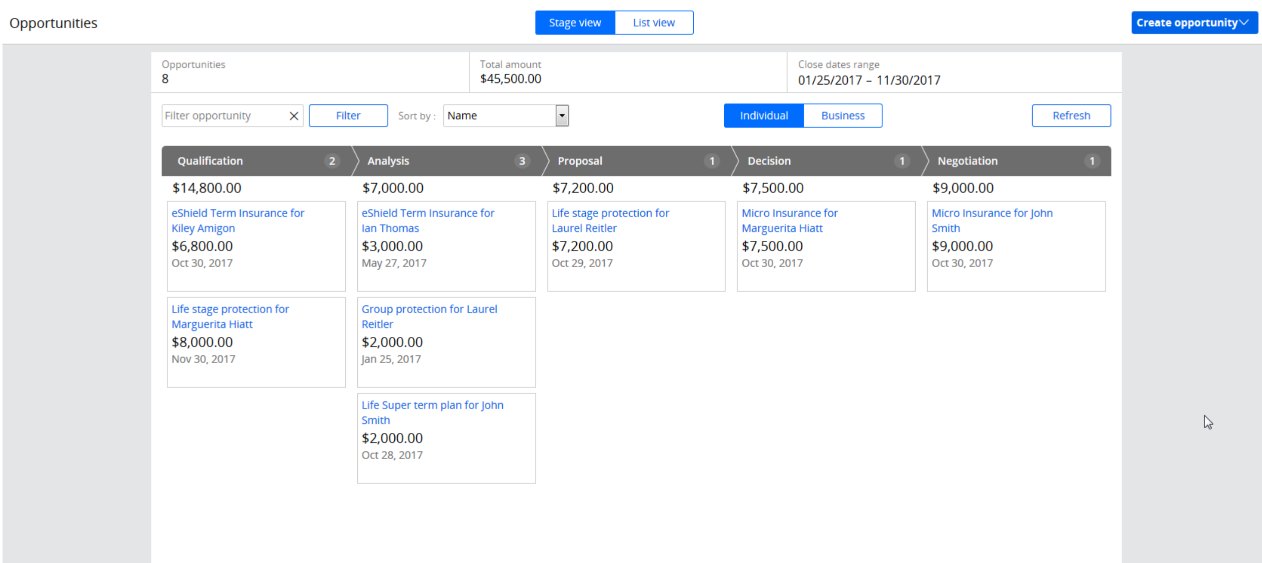


Opportunity management

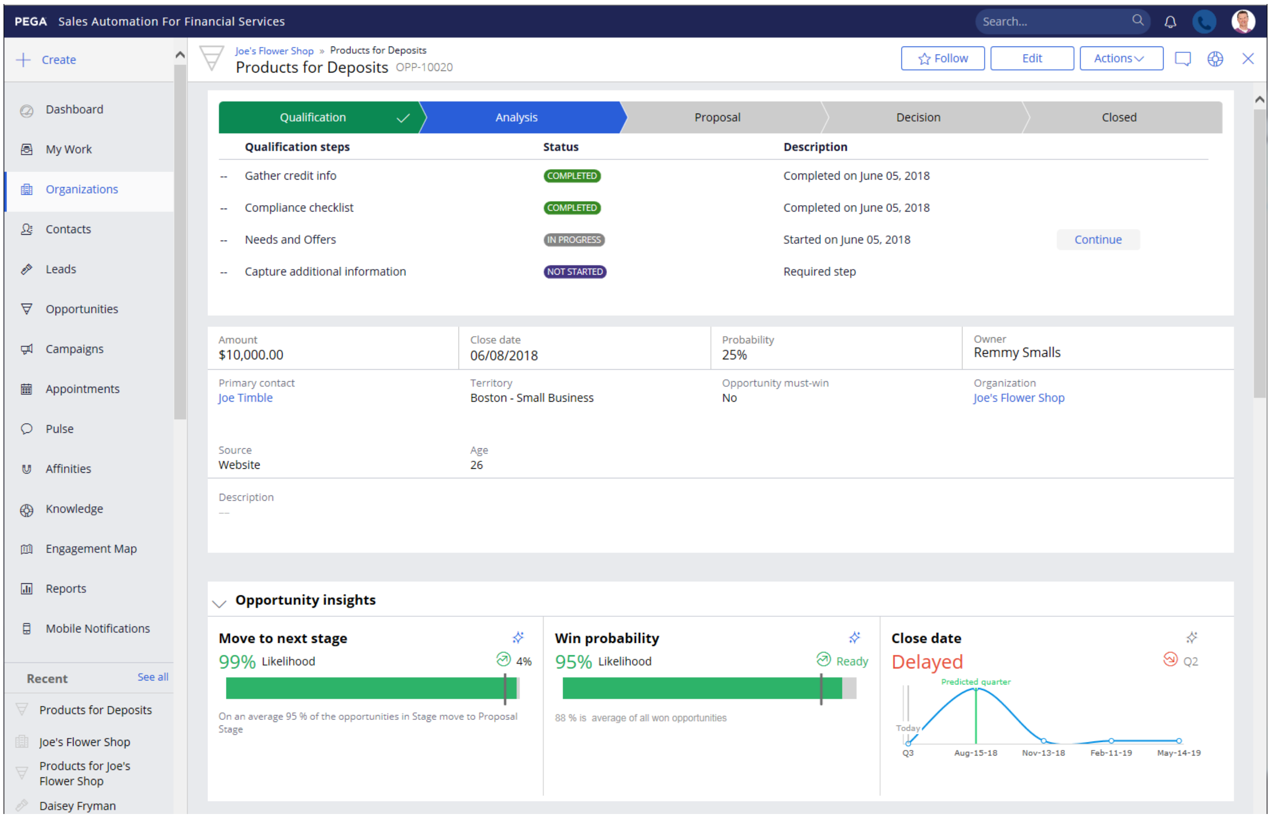
Opportunities are at the core of the Pega Sales Automation for Financial Services system, providing real-time insight into the sales pipeline. Sales managers and reps can analyze their pipeline by stage, understand their competitors, and see all recent activity for their deals. Sales reps are intelligently guided through each stage of the selling process by taking advantage of Pega Case Lifecycle Management features. Sales representatives are guided to gather the financial needs of their customer in order to provide the best recommendation for a product. Opportunity dashboard widgets give sales organizations insight into the current pipeline, pipeline trends, win/loss analysis, and where deals fall out of the sales process.

Sales Automation for Financial Services provides a Small Business and a Retail opportunity flow for both B2B and B2C interactions. These can be adapted or specialized for more discrete financial services market segment needs.

Opportunity home page



Opportunity detail

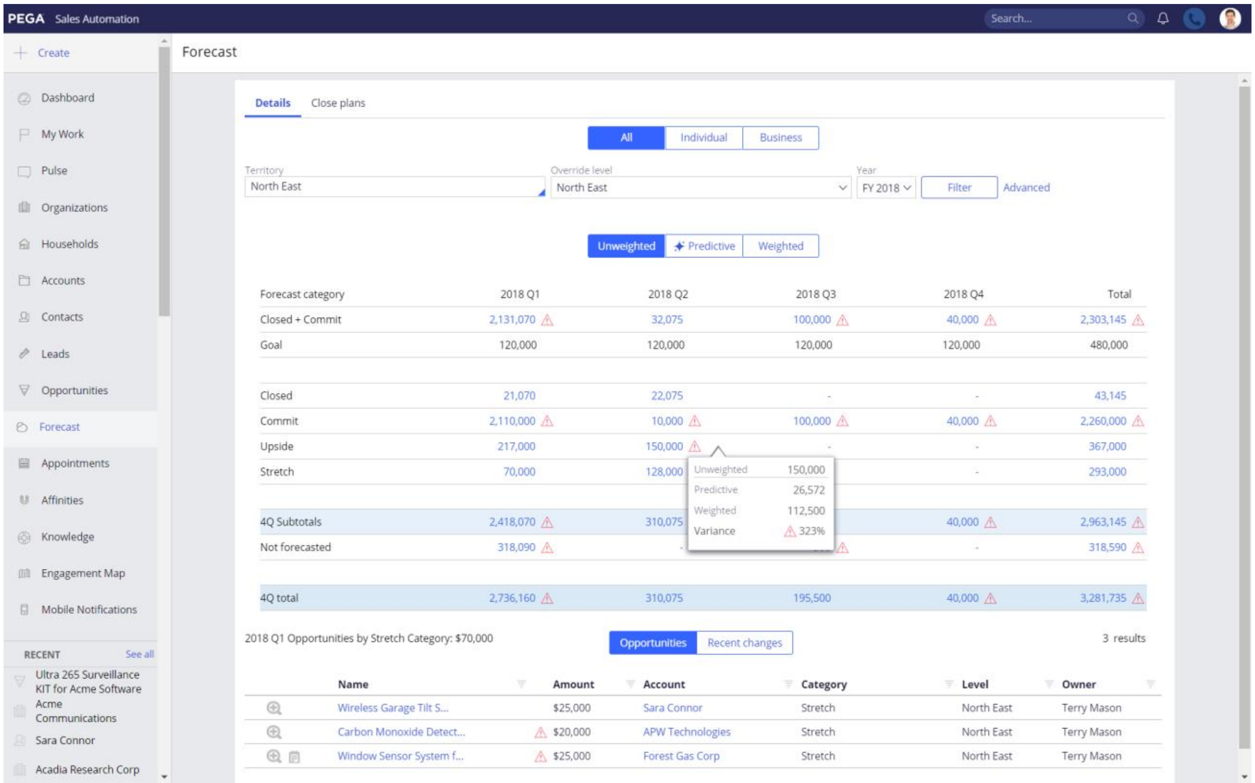


Forecast management

Forecast management improves the sales organization's ability to predict the sales cycle by providing rollups of the sales pipeline by category, quarter, and territory. Territory owners at all levels can adjust opportunity amounts, close dates, and forecast categories to allow for the most realistic sales picture possible at each territory level. Behind every element in the forecast is an audit of the recent changes with an indication of how it affects a forecast, so the sales team always knows why and when it was updated.

Artificial Intelligence helps you compare sales generated forecasts with AI-generated numbers for each territory. Alerts draw attention to forecasts that vary beyond a configurable threshold between sales numbers and artificial intelligence numbers.

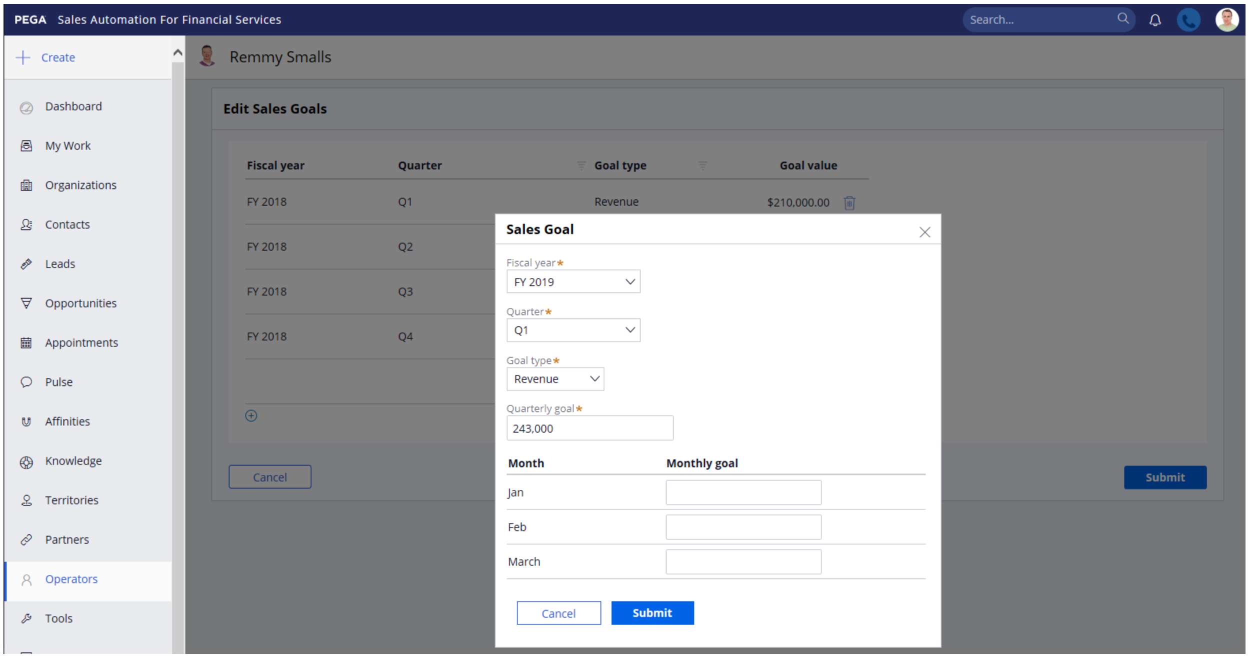
Forecast gadget on desktop



Forecast category	2018 Q1	2018 Q2	2018 Q3	2018 Q4	Total
Closed + Commit	2,131,070	32,075	100,000	40,000	2,303,145
Goal	120,000	120,000	120,000	120,000	480,000
Closed	21,070	22,075	-	-	43,145
Commit	2,110,000	10,000	100,000	40,000	2,260,000
Upside	217,000	150,000	-	-	367,000
Stretch	70,000	128,000		-	293,000
4Q Subtotals	2,418,070	310,075		40,000	2,963,145
Not forecasted	318,090	-		-	318,590
4Q total	2,736,160	310,075	195,500	40,000	3,281,735

Sales goal management

Sales goal management enables organizations to set business goals (for example, individual rep quotas, product counts or activity objectives) and track goal attainment over time via dashboards and reports. Sales reps can track their quarterly quota attainment, and managers have insight into detailed team and territory attainment levels with roll-ups and drill-downs across all levels of the sales hierarchy.

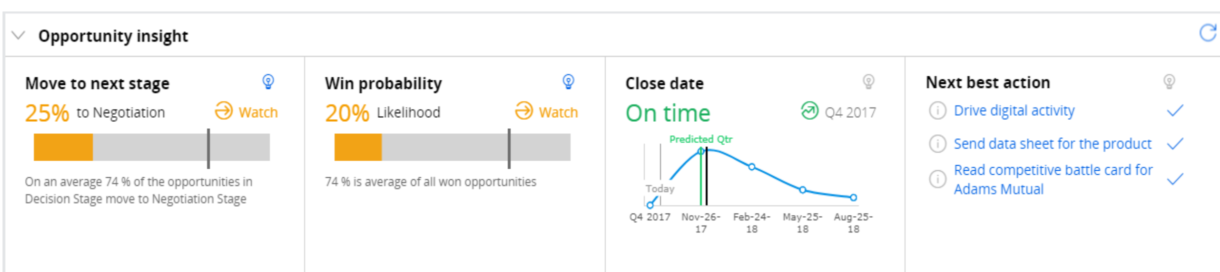


Pega Sales Automation for Financial Services mobile

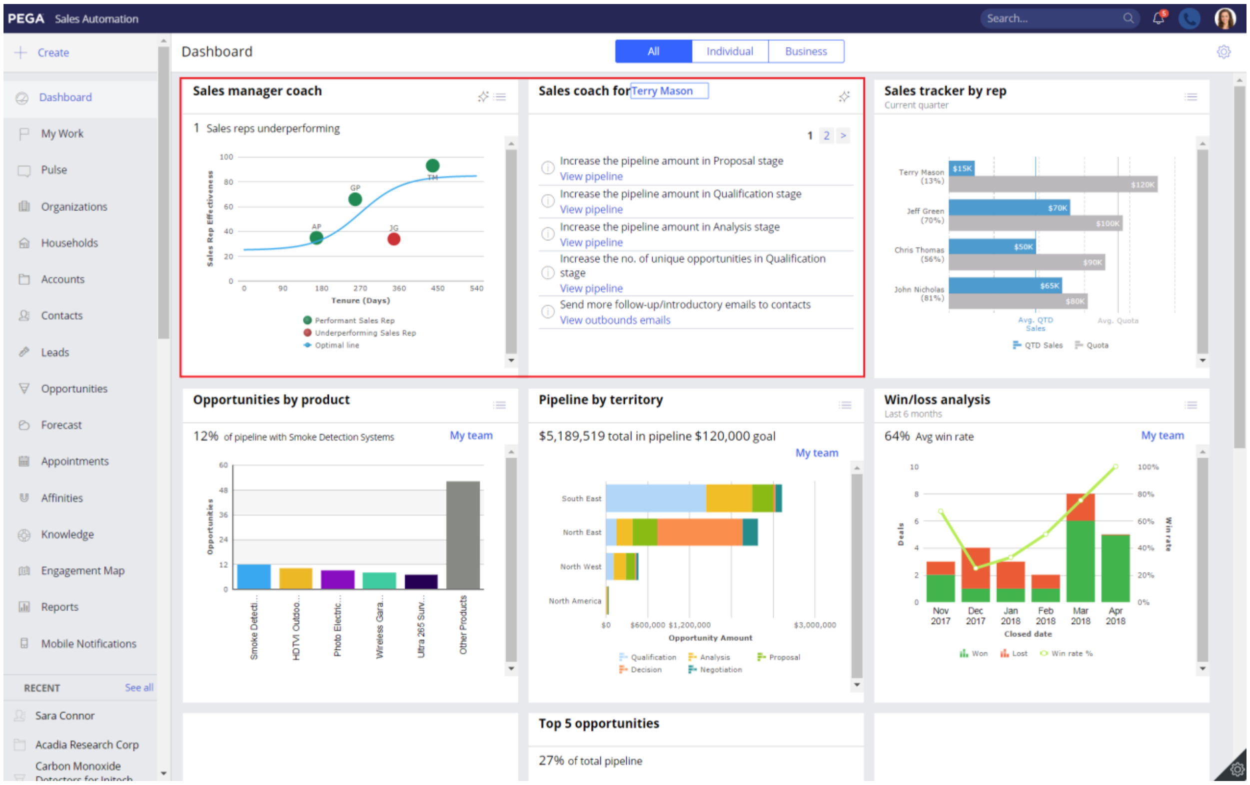
Designed specifically for the mobile sales team, the smart phone app that incorporates "mobile first" designs has an intuitive and actionable user experience to perform your common sales activities. The smartphone app exploits mobile device APIs—geolocation to find contacts nearby, voice to text capabilities, and push notifications to alert reps that they are late to a meeting or when other critical thresholds are met. Personalized mobile dashboards provide real-time business insights while on the go. When there is no data connection, offline mode supports logging activities and viewing recent and followed entities; offline mode can also be configured and modified to support a variety of use cases such as sales stage promotion or data/process validation.

Artificial Intelligence–based insights

Opportunity insights can predict the probability of a deal closing, when it will close, and even the odds that a deal will move to the next stage.

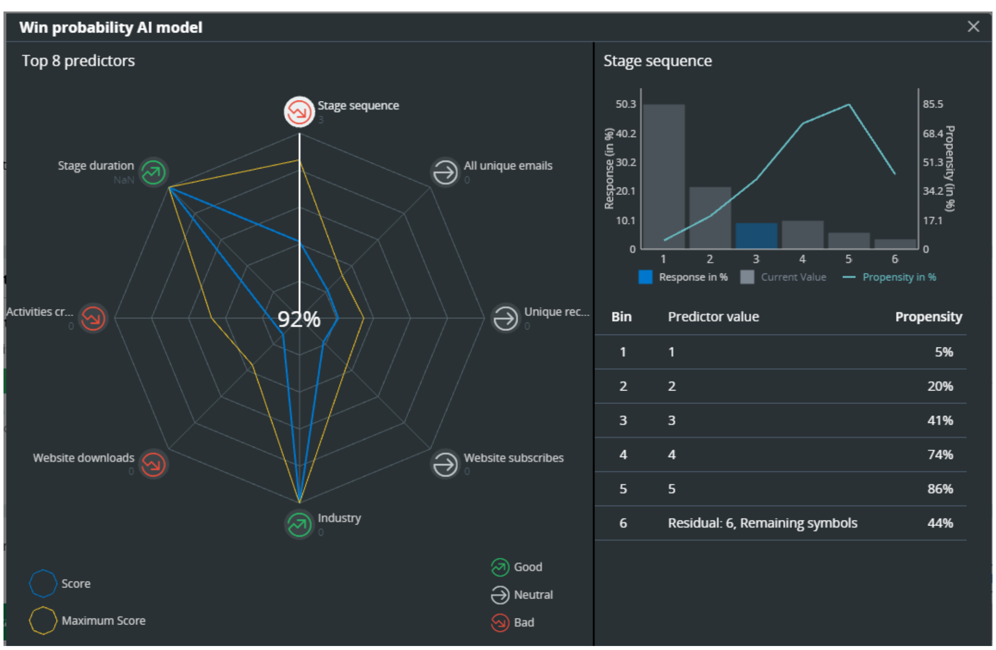


Sales manager coach widgets use AI to monitor sales team performance and provide coaching advice for the sales manager to get their teams back on track.



Adaptive model-based lead scoring that helps sales reps prioritize lead follow up

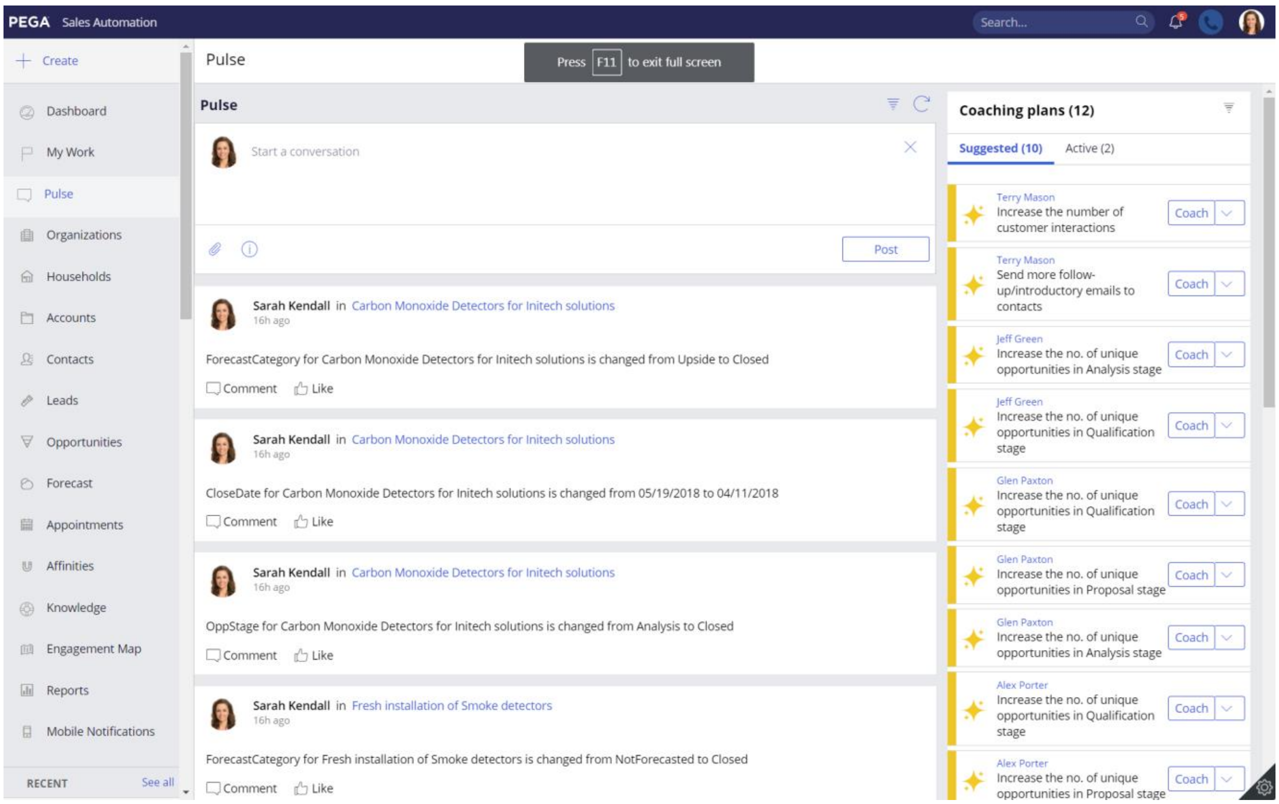
Transparent artificial intelligence helps build trust among users for artificial intelligence capabilities through visualizations on adaptive models



Bin	Predictor value	Propensity
1	1	5%
2	2	20%
3	3	41%
4	4	74%
5	5	86%
6	Residual: 6, Remaining symbols	44%

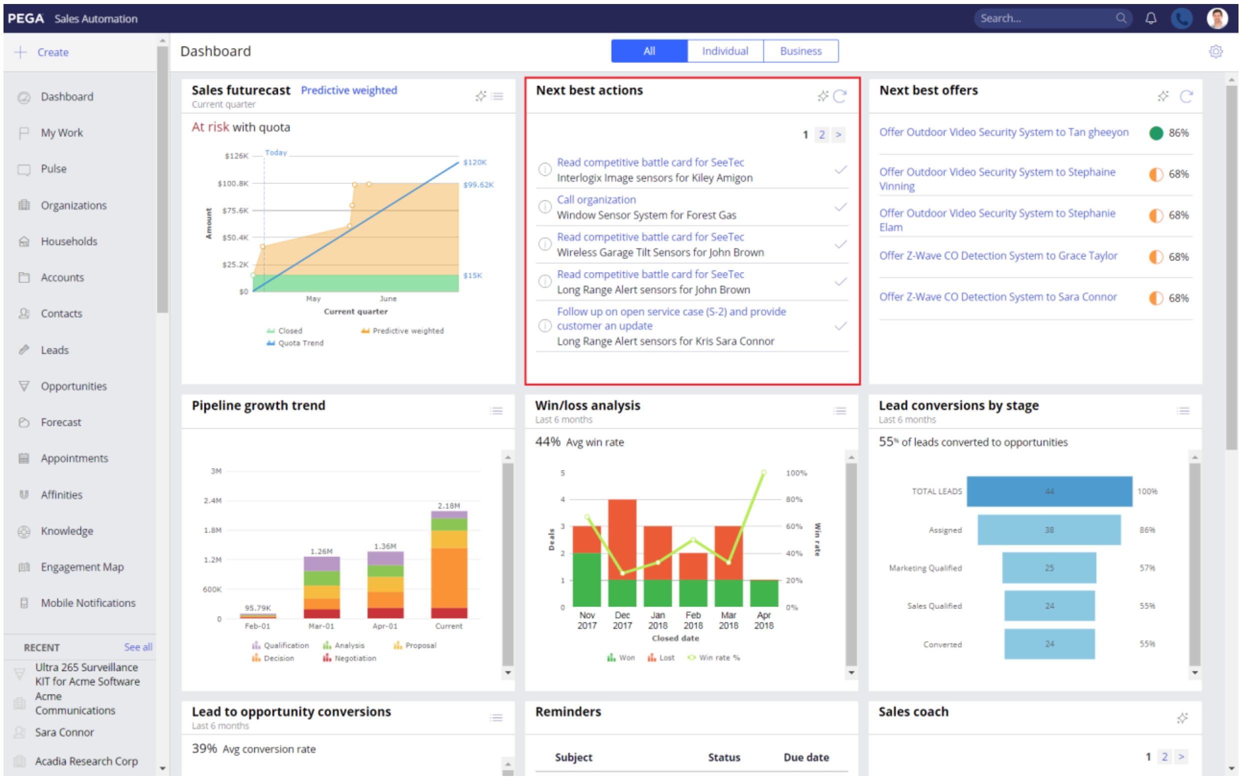
Sales coaching via Pulse

Sales Coach in Pulse is designed to enable Sales Managers to seamlessly deliver efficient coaching. The widget will display coaching recommendations for all the Sales Reps reporting to a Manager if different areas. Managers can then devise personalized ‘Coaching Plans’ for each of these coaching recommendations. Sales Coach will also follow-up with the Sales Managers and Reps by providing them an update on the Rep’s progress in a coaching recommendation.



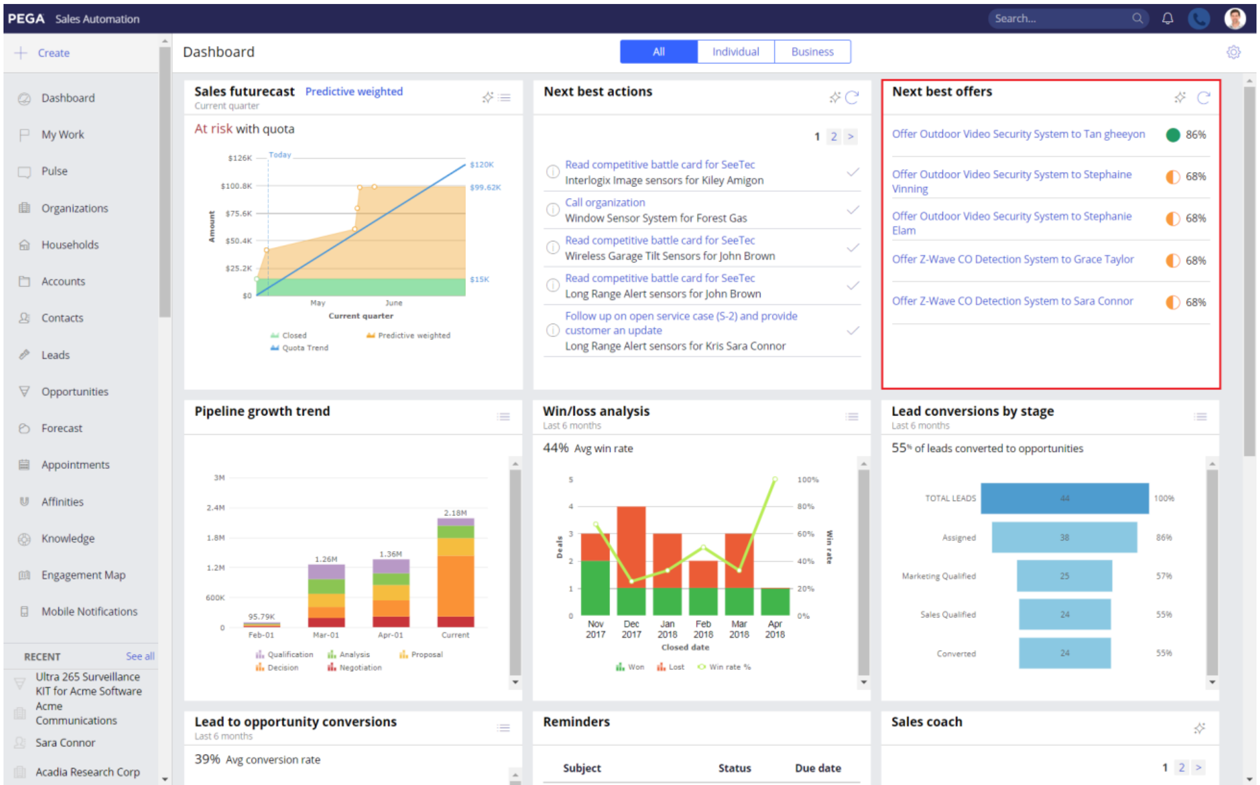
Next Best Action for opportunities

Built in and configurable decisioning strategies and rules identify the next best action for every opportunity and rank and present the top actions in the sales rep’s dashboard. These strategies and rules use a combination of predictors such as digital activity, service activity, products sold, and sales rep activity to determine the next best action for every opportunity.



Next-best sales offer*

Pega Sales Automation for Financial Services leverages the Pega Customer Decision Hub to identify the top offer for the population of contacts within a sales rep's book of business. Using customer lifetime value (CLV) and Winscore (Opportunity Amount and Close Date) adaptive models, the Pega AI engine generates the offers that have the highest relevance to the current sales situation and propensity to close. After an offer is accepted, an Opportunity or Lead is automatically created based on the configuration of the offer



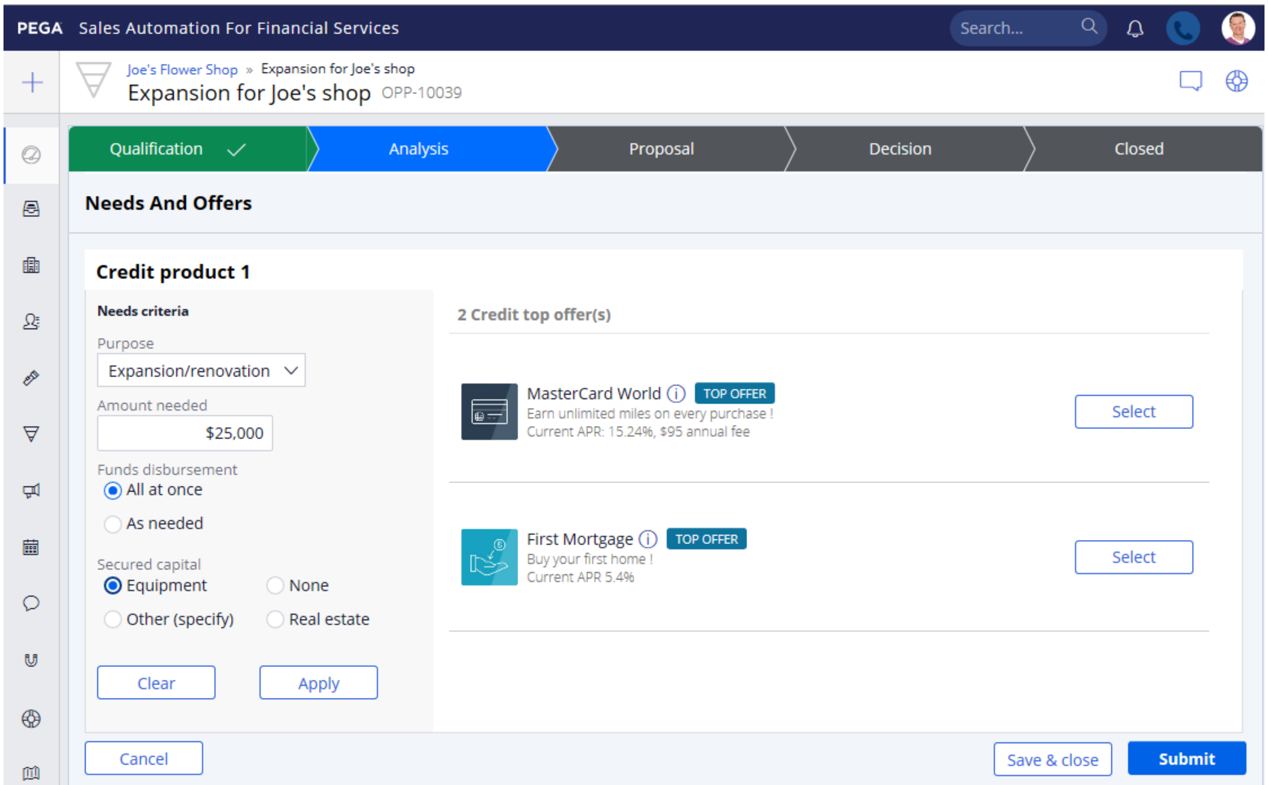
Guided selling

Pega built-in process and case management guides the sales rep through the required activities, steps, and stages of your sales cycle and then allows you to track open work assignments across your entire organization (not just sales). Guided selling also enables you to model different sales methodologies and work across different sales teams while handling a mixture of B2B, B2C, business and individual opportunities and forecasts in one application. Quickly adapt and change sales methodologies based on market conditions and automate key activities throughout the process.

Qualification ✓	Analysis	Proposal	Decision	Closed
Determine timeline ✓	Gather credit info	Review proposal	Process application	Fulfilment status
Identify stakeholders ✓	Compliance checklist	Send documents		Send thank you
Know your business ✓	Product selection	Update proposal		Schedule post-mortem

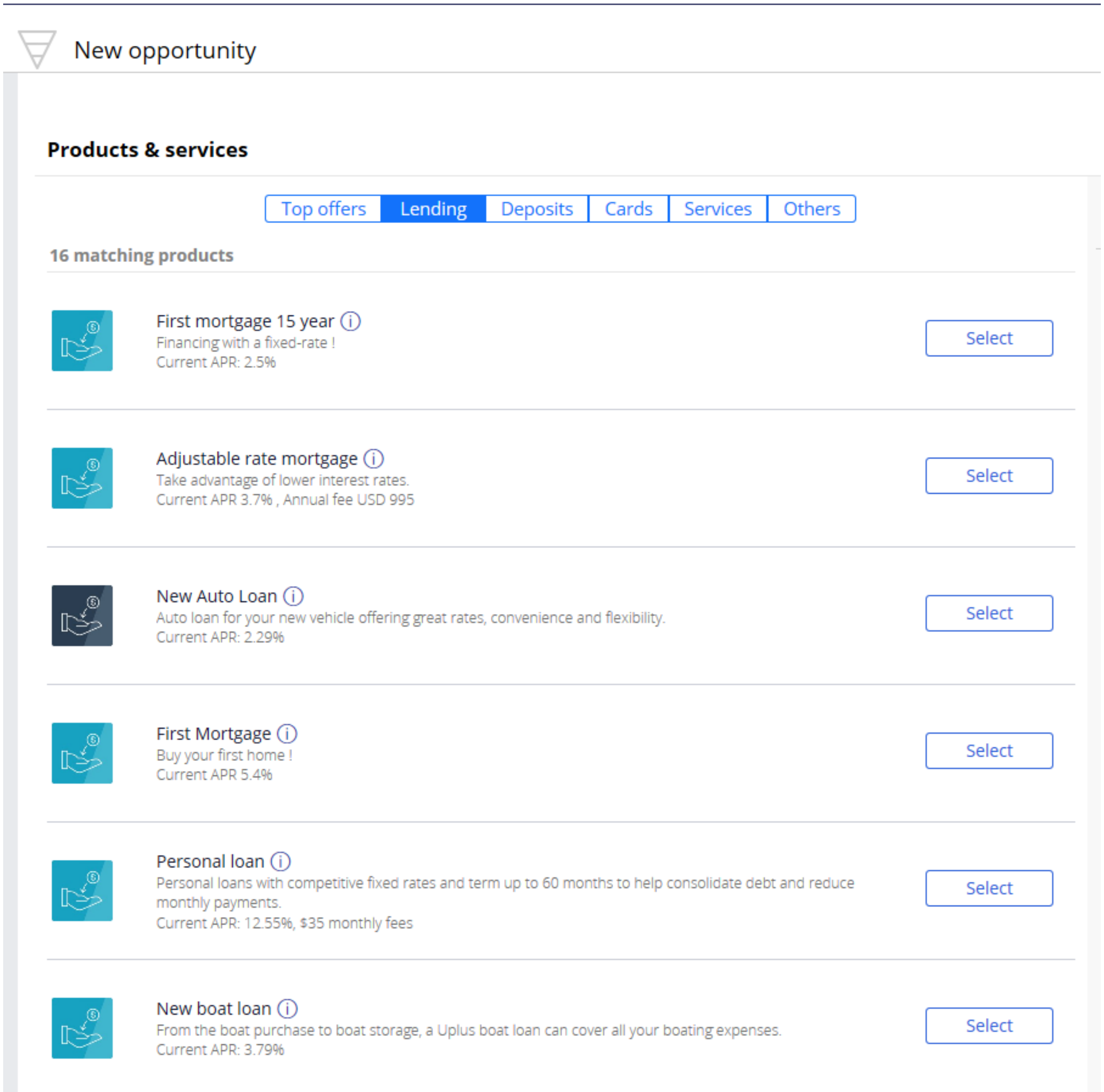
Financial Needs Assessment

Sales Automation for Financial Services automates the financial needs assessment process so that the sales rep can gather and document the financial needs of the client and identify corresponding products that meet those needs. This provides the audit trail necessary to show that the customers best interests were identified and utilized to help serve them the 'best fit' product.



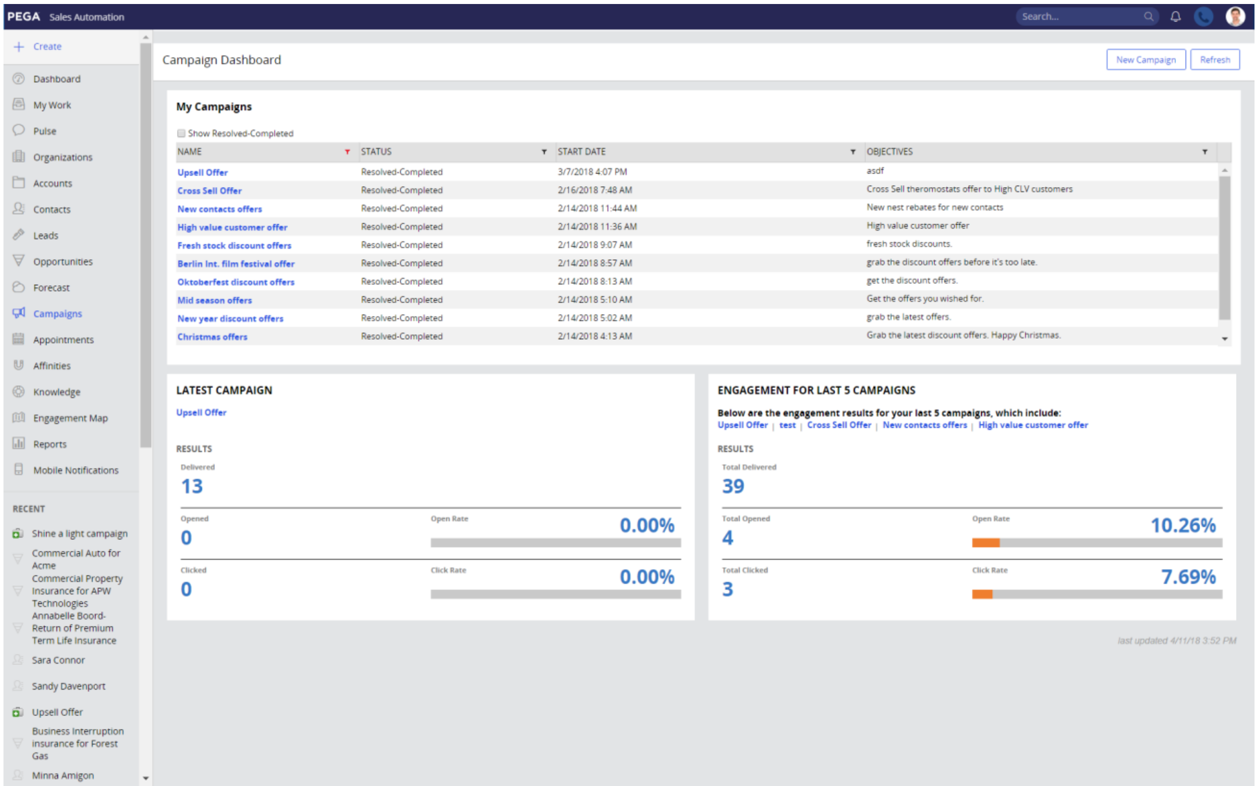
Robust Product Catalog Integration

Sales Automation for Financial Services allows customers to integrate with preexisting product catalogs or utilize Pega Product Designer for Financial Services to manage and support the product life cycle. Sales representatives will be able to access only those products they are authorized to sell in their region and have robust product details and documentation allowing them to easily understand and explain products to their customers.



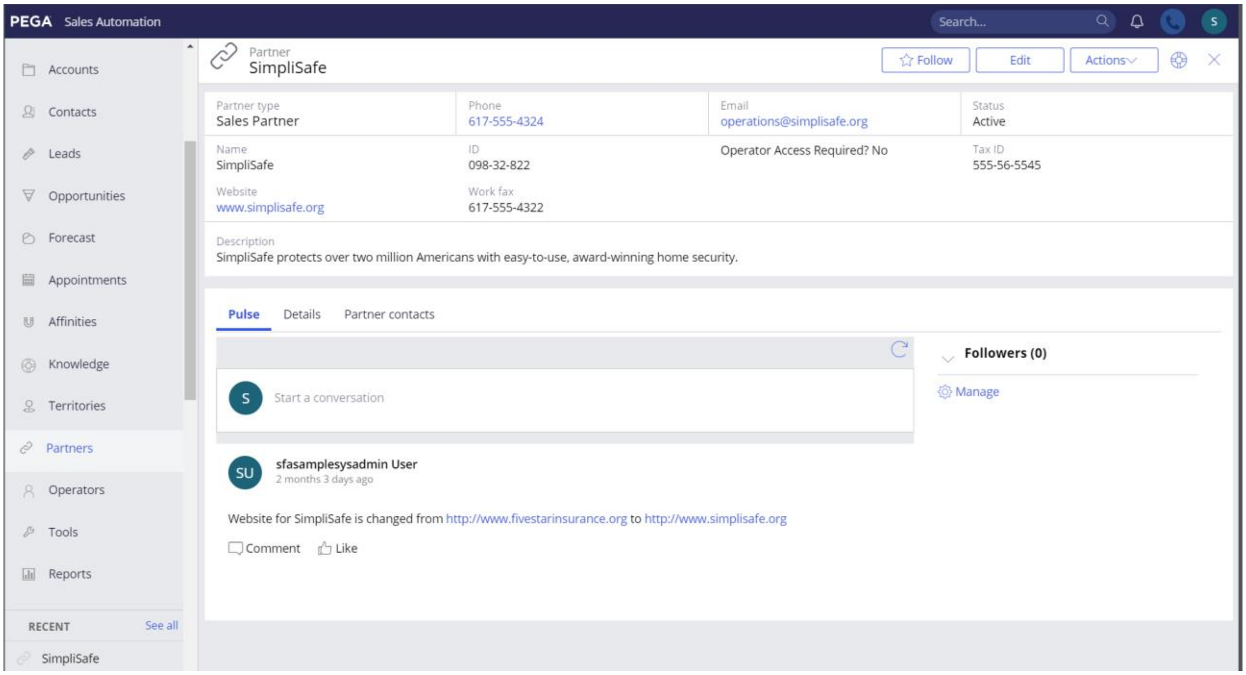
Local campaigns*

Local Campaigns allow sales reps to send personalized B2B and B2C campaigns to their contacts. Sales reps create, send and track campaigns from a simple, intuitive user interface from within Pega Sales Automation for Financial Services. Flexible segmentation allows sales reps to target subsets of their contacts to receive the campaign and can then monitor the open rate, click rate, and acceptance rate via dashboards. Responses to campaigns will automatically route leads back to the sales rep. Communication templates and automated tracking of responses provides the constraints needed to have compliant marketing interactions with your prospects.



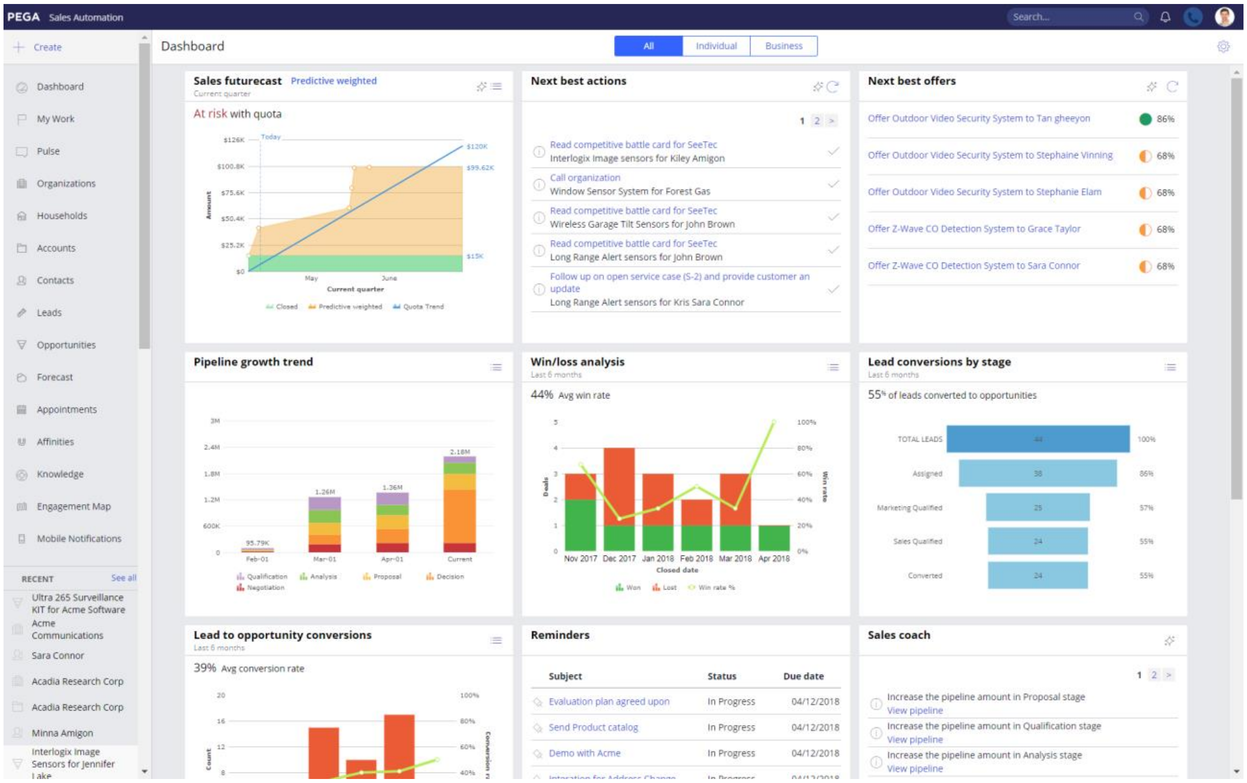
Partner agency management

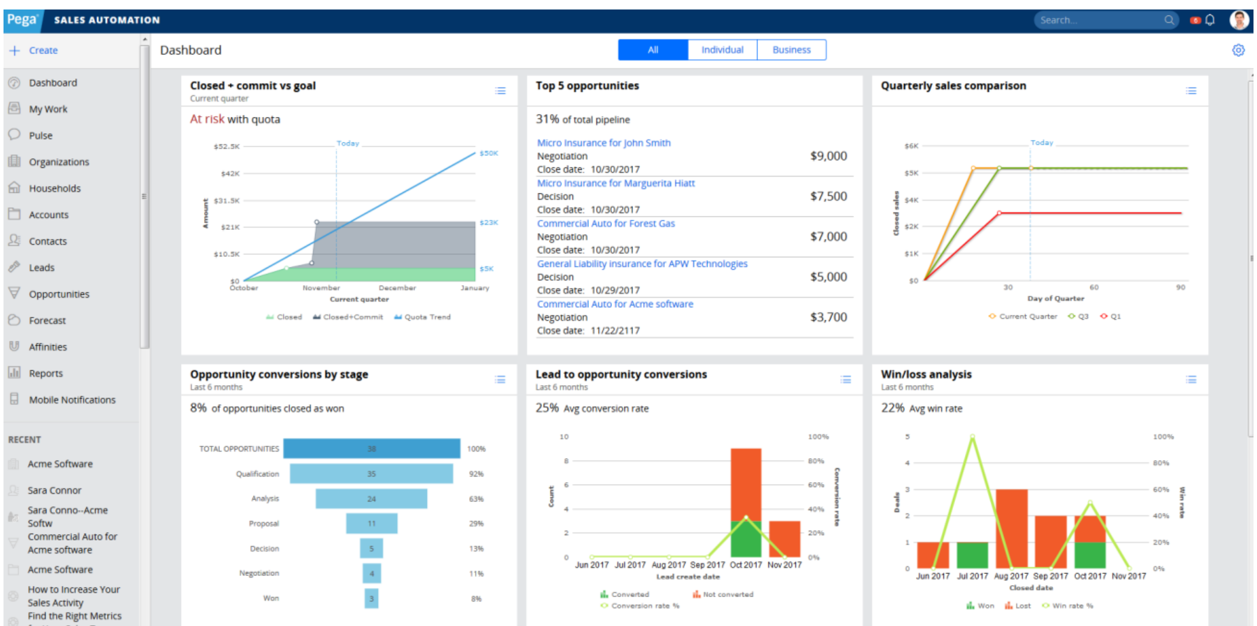
Empower your partners and agencies to leverage the benefits of Pega Sales Automation for Financial Services while gaining insight into their deals, sales activities, and forecasts from a single application instance. Model a partner organization's tiered structure and grant granular access using territory security. Global sales ops can easily set up and administer partners, as well as delegate user and territory administration to the local sales ops users at the partner organization.



Dashboards and reports

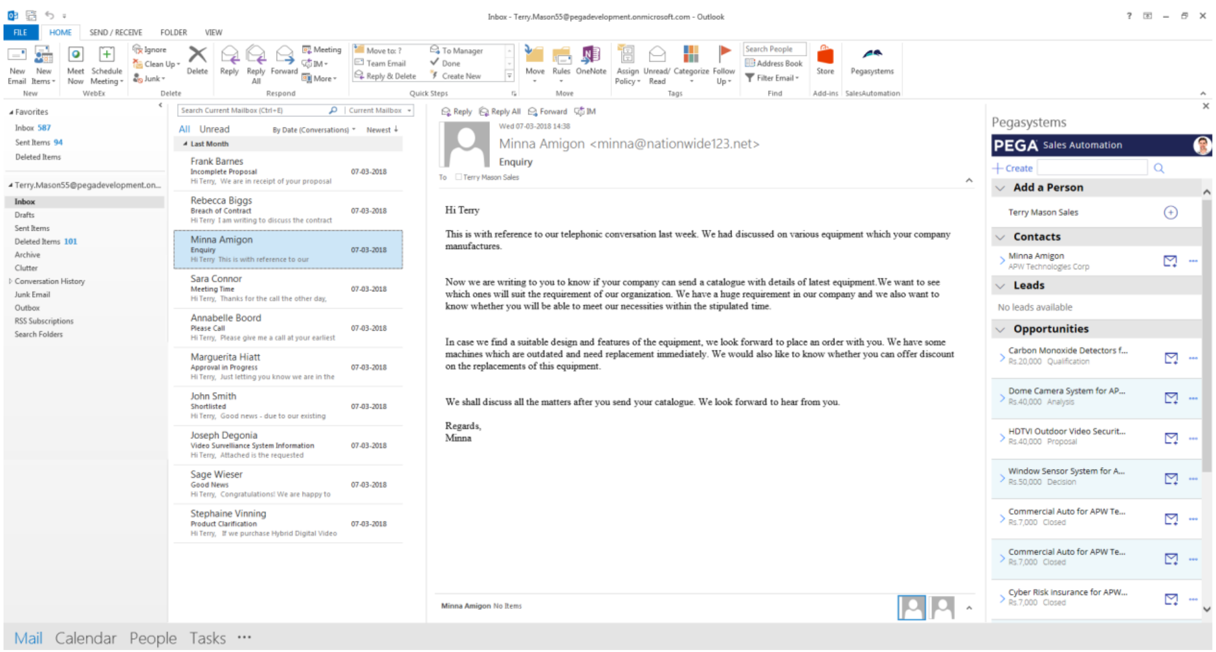
Visual, interactive dashboards enable teams to make smarter decisions from anywhere. Pega-provided widgets allow sales users to easily track next best actions, next best offers, analytics around your forecasts, lead volume, conversion rates, and any part of your pipeline that is instrumented for a real-time view of the state of your business. Teams are able to view B2C and B2B dashboard reports in one instance. Each sales person dashboard provides a personal summary while the sales manager dashboard gives a team view with the ability to analyze the details of each team member.


PEGA Sales Automation
Create
Dashboard
All
Individual
Business
Dashboard
My Work
Pulse
Organizations
Households
Accounts
Contacts
Leads
Opportunities
Forecast
Appointments
Affinities
Knowledge
Engagement Map
Mobile Notifications
RECENT
See all
Ultra 265 Surveillance KIT for Acme Software
Acme Communications
Sara Connor
Acadia Research Corp
Acadia Research Corp
Minna Amigon
Interlogix Image Sensors for Jennifer Lake
Sales futurecast
Predictive weighted
Current quarter
At risk with quota
Current quarter
Closed
Predictive weighted
Quota Trend
Next best actions
Read competitive battle card for SeeTec
Interlogix Image sensors for Kiley Amigon
Call organization
Window Sensor System for Forest Gas
Read competitive battle card for SeeTec
Wireless Garage Tilt Sensors for John Brown
Read competitive battle card for SeeTec
Long Range Alert sensors for John Brown
Follow up on open service case (S-2) and provide customer an update
Long Range Alert sensors for Kris Sara Connor
Next best offers
Offer Outdoor Video Security System to Tan gheeyon
86%
Offer Outdoor Video Security System to Stephanie Vinning
68%
Offer Outdoor Video Security System to Stephanie Elam
68%
Offer Z-Wave CO Detection System to Grace Taylor
68%
Offer Z-Wave CO Detection System to Sara Connor
68%
Pipeline growth trend
Qualification
Analysis
Proposal
Decision
Negotiation
Win/loss analysis
Last 6 months
44% Avg win rate
Closed date
Won
Lost
Win rate %
Lead conversions by stage
Last 6 months
55% of leads converted to opportunities
TOTAL LEADS
Assigned
Marketing Qualified
Sales Qualified
Converted
Lead to opportunity conversions
Last 6 months
39% Avg conversion rate
Reminders
Subject
Status
Due date
Evaluation plan agreed upon
In Progress
04/12/2018
Send Product catalog
In Progress
04/12/2018
Demo with Acme
In Progress
04/12/2018
Sales coach
Increase the pipeline amount in Proposal stage
View pipeline
Increase the pipeline amount in Qualification stage
View pipeline
Increase the pipeline amount in Analysis stage
View pipeline


Pega SALES AUTOMATION
Create
Dashboard
All
Individual
Business
Dashboard
My Work
Pulse
Organizations
Households
Accounts
Contacts
Leads
Opportunities
Forecast
Affinities
Reports
Mobile Notifications
RECENT
Acme Software
Sara Connor
Sara Conno–Acme Softw
Commercial Auto for Acme software
Acme Software
How to Increase Your Sales Activity
Find the Right Metrics for Your Sales Team
Closed + commit vs goal
Current quarter
At risk with quota
Current quarter
Closed
Closed+Commit
Quota Trend
Top 5 opportunities
31% of total pipeline
Micro Insurance for John Smith
Negotiation
Close date: 10/30/2017
$9,000
Micro Insurance for Marguerita Hiatt
Decision
Close date: 10/30/2017
$7,500
Commercial Auto for Forest Gas
Negotiation
Close date: 10/30/2017
$7,000
General Liability insurance for APW Technologies
Decision
Close date: 10/29/2017
$5,000
Commercial Auto for Acme software
Negotiation
Close date: 11/22/2117
$3,700
Quarterly sales comparison
Day of Quarter
Current Quarter
Q3
Q1
Opportunity conversions by stage
Last 6 months
8% of opportunities closed as won
TOTAL OPPORTUNITIES
Qualification
Analysis
Proposal
Decision
Negotiation
Won
Lead to opportunity conversions
Last 6 months
25% Avg conversion rate
Lead create date
Converted
Not converted
Conversion rate %
Win/loss analysis
Last 6 months
22% Avg win rate
Closed date
Won
Lost
Win rate %

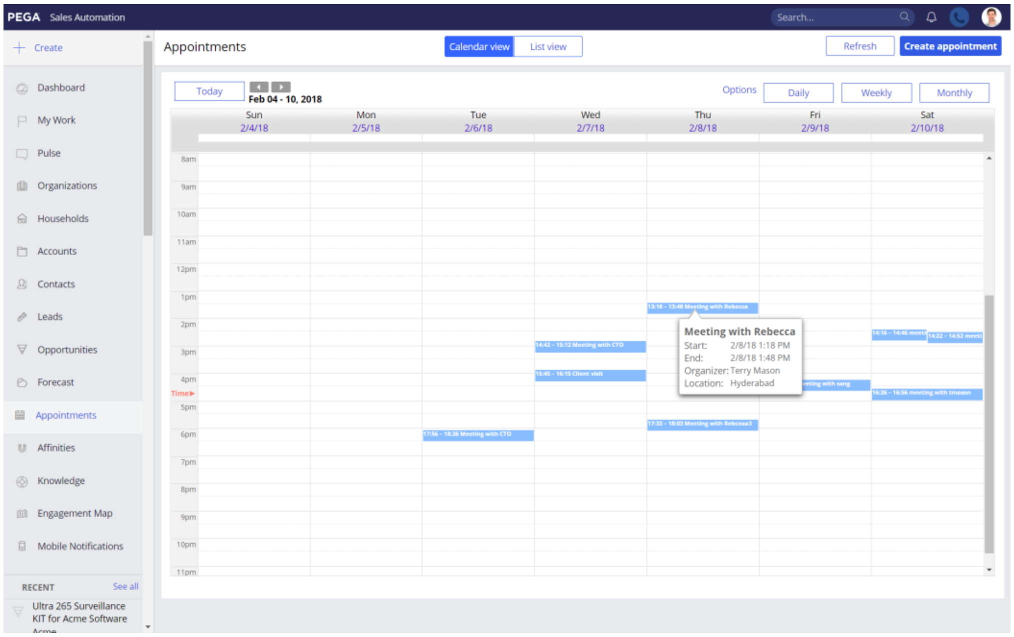
Pega for Outlook

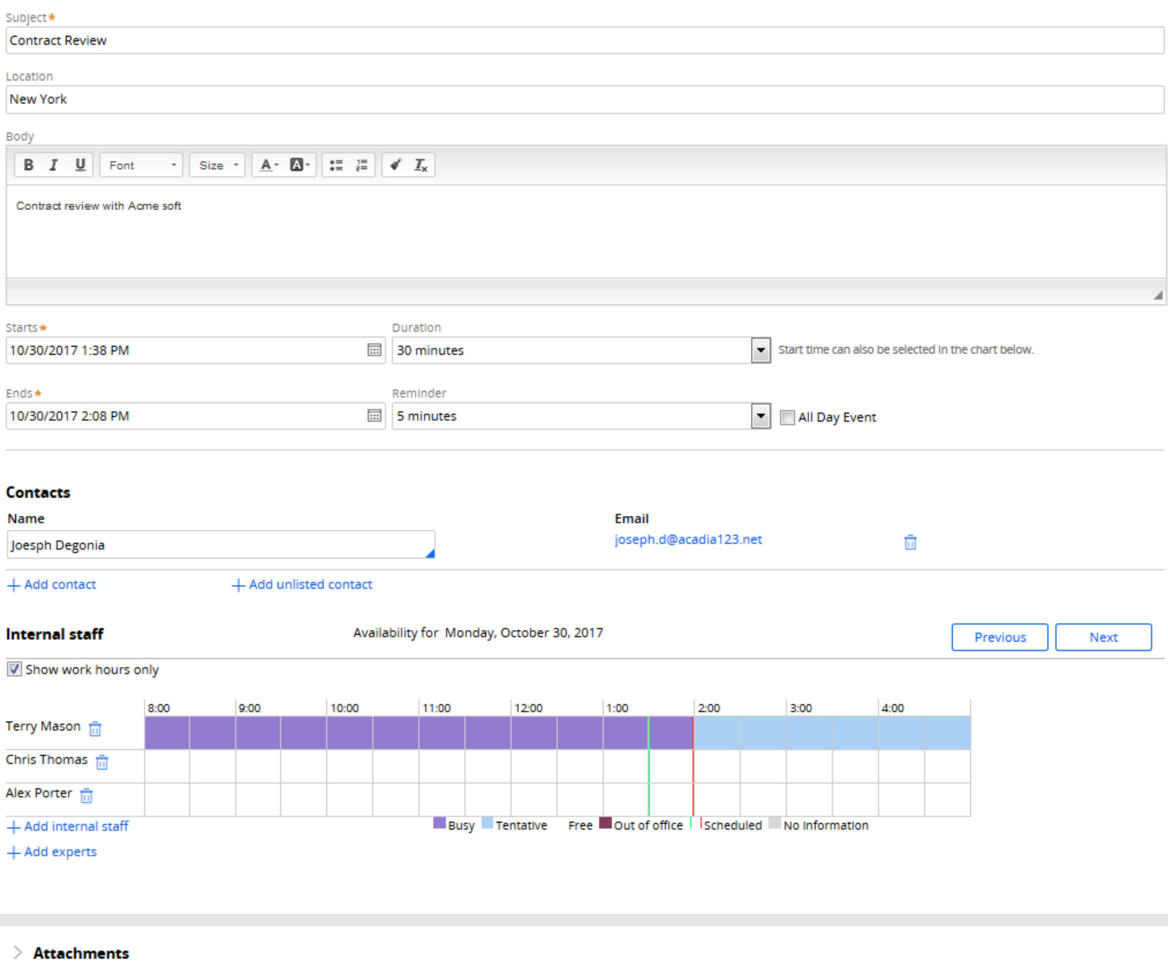
The Pega for Outlook add-in gives sales reps contextual insight into Pega Sales Automation for Financial Services right from their Outlook client. As emails and appointments are selected in Outlook, Pega for Outlook gives a complete view of the relevant leads, opportunities, contacts and accounts. Emails and appointments can be synced to Pega Sales Automation for Financial Services with a single click and the quick create function includes the ability to add contacts, leads and opportunities. Available as a client installation, or on the new Microsoft Office add-in architecture with support for Mac and mobile.



Microsoft Exchange integration

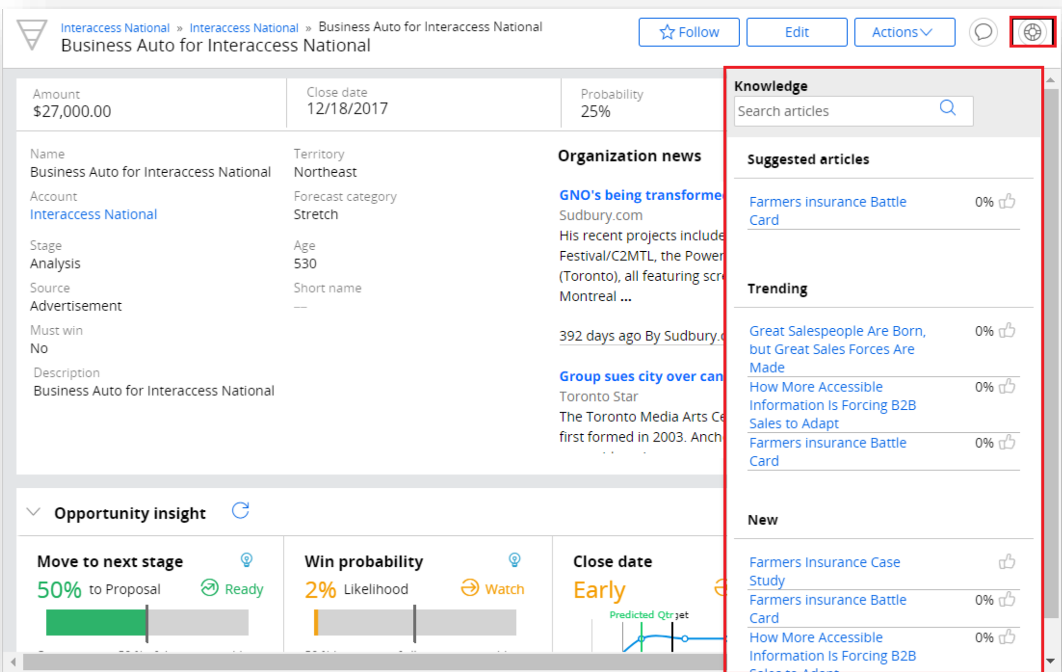
Bi-directional sync with Microsoft Exchange allows managers and reps to manage calendar appointments across sales teams, customers, prospects, and subject matter experts from directly within Pega Sales Automation for Financial Services while always staying in sync with their Microsoft Exchange calendar. For example, reps can view sales team attendee availability in real-time and sync appointments to Exchange. External system users can see free/busy time for a rep so that sales appointments may be setup.


PEGA Sales Automation
Search...
Create
Appointments
Calendar view
List view
Refresh
Create appointment
Dashboard
My Work
Pulse
Organizations
Households
Accounts
Contacts
Leads
Opportunities
Forecast
Appointments
Affinities
Knowledge
Engagement Map
Mobile Notifications
RECENT
See all
Ultra 265 Surveillance KIT for Acme Software
Today
Feb 04 - 10, 2018
Options
Daily
Weekly
Monthly
Sun 2/4/18
Mon 2/5/18
Tue 2/6/18
Wed 2/7/18
Thu 2/8/18
Fri 2/9/18
Sat 2/10/18
Meeting with Rebecca
Start: 2/8/18 1:18 PM
End: 2/8/18 1:48 PM
Organizer: Terry Mason
Location: Hyderabad


Subject
Contract Review
Location
New York
Body
Font
Size
Contract review with Acme soft
Starts
10/30/2017 1:38 PM
Duration
30 minutes
Start time can also be selected in the chart below.
Ends
10/30/2017 2:08 PM
Reminder
5 minutes
All Day Event
Contacts
Name
Joesph Degonia
Email
joseph.d@acadia123.net
Add contact
Add unlisted contact
Internal staff
Availability for Monday, October 30, 2017
Previous
Next
Show work hours only
8:00
9:00
10:00
11:00
12:00
1:00
2:00
3:00
4:00
Terry Mason
Chris Thomas
Alex Porter
Add internal staff
Add experts
Busy
Tentative
Free
Out of office
Scheduled
No information
Attachments

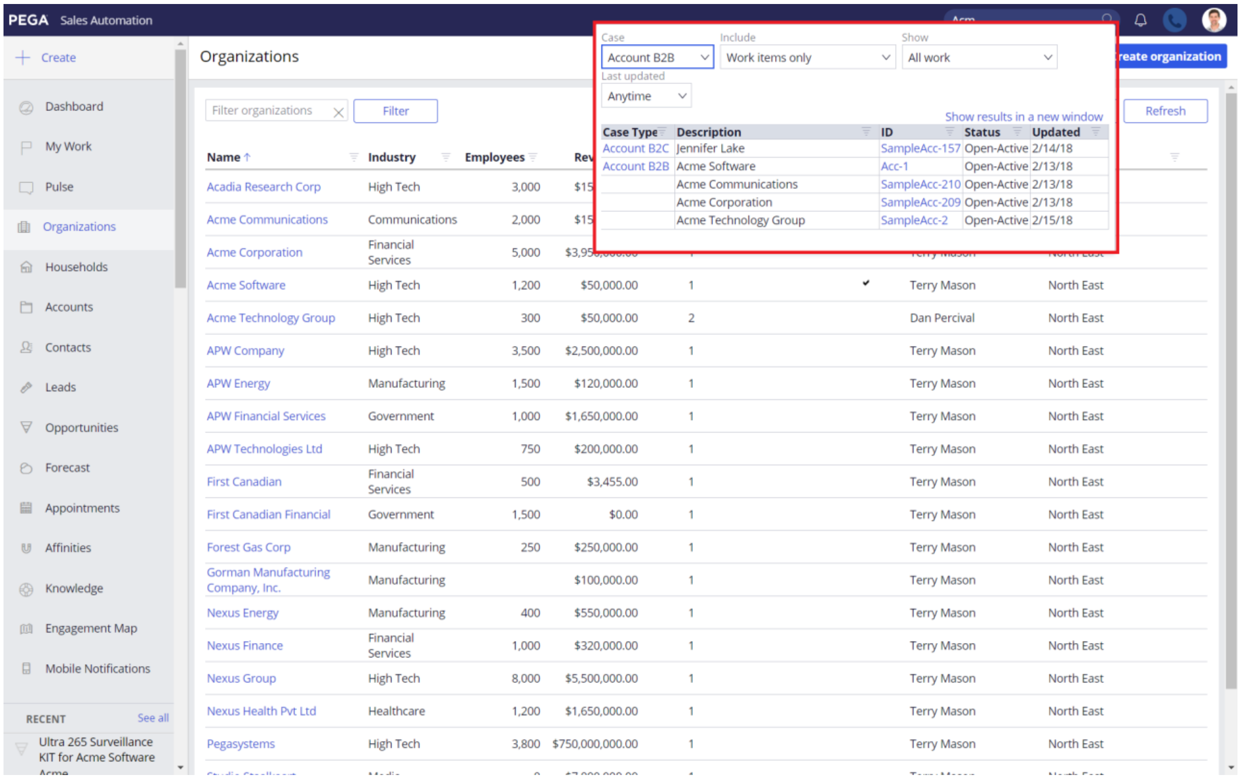
Pega Knowledge

Seamless integration with Pega Knowledge gives every sales automation user access to sales collateral and content. Users can browse and search the knowledge library, or sales ops and managers can push suggested content to reps based on the attributes of their leads and opportunities. One-click sharing makes it easy to send content to co-workers, prospects and customers.



Search

Global search performs an indexed, optimized search across all of the work objects that the logged in user can access. By combining Lucene search with territory security, the sales team can easily find the data they need from a single search dialogue on any device, displayed in order of relevancy.



B2B and B2C selling models

Whether selling to individuals through agencies and organizations as in Commercial and Small Business banking, or directly to individuals, as in Retail and Wealth Management, Pega Sales Automation for Financial Services supports your B2B and B2C selling modes in a single instance. The user interface and data model dynamically adapt based on the type of customer to whom you sell.

Social Media integration

Pega Sales Automation for Financial Services integrates with Twitter and Facebook by allowing sales reps to associate the Lead, Contact, Organization, and Account information in Sales Automation to online profiles.

Territory and security management

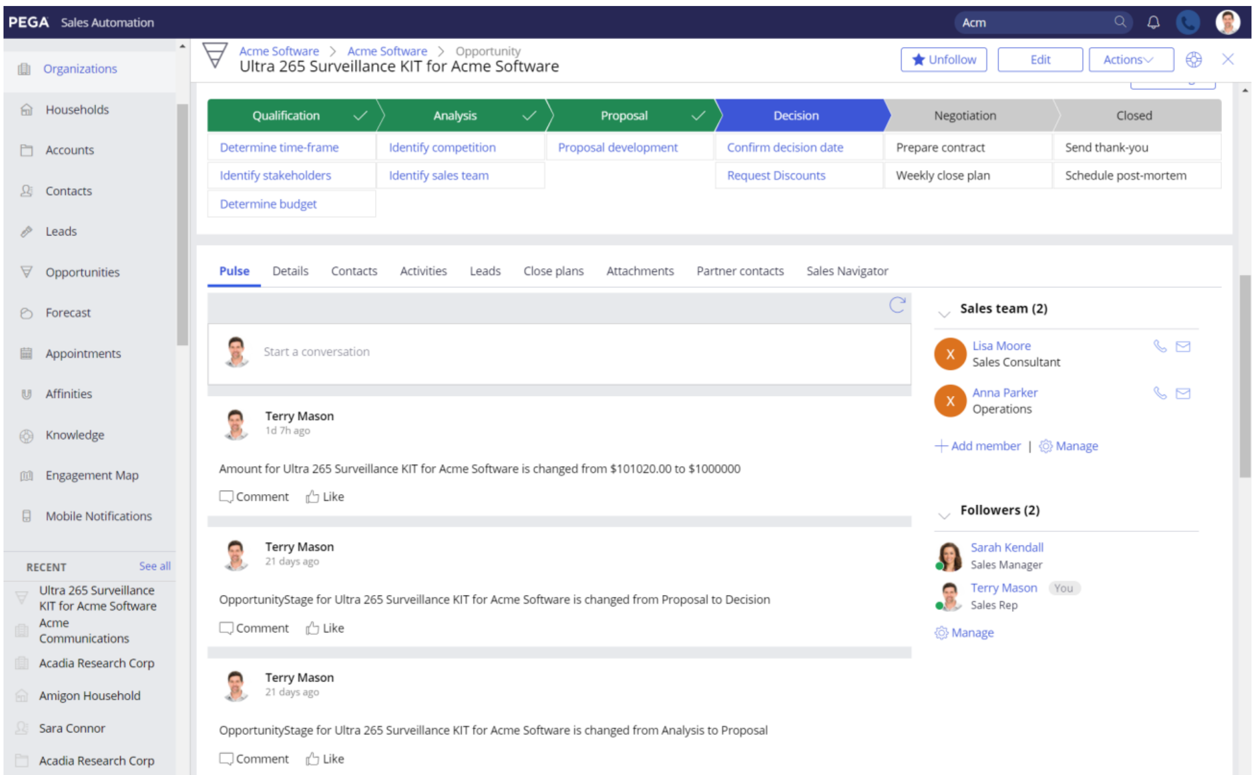
Territory and Security Management capabilities allow for granular and flexible access permissions for sales reps and managers. Using a hierarchical territory structure, Sales Ops can grant create, read, and update access based on the user, territory, and work object type.

Team selling

Team selling for accounts and opportunities allows sales reps to access work objects (i.e. leads, contacts, opportunities) that are not within their territory. Reps on a sales team have full access to the Accounts and Opportunities.

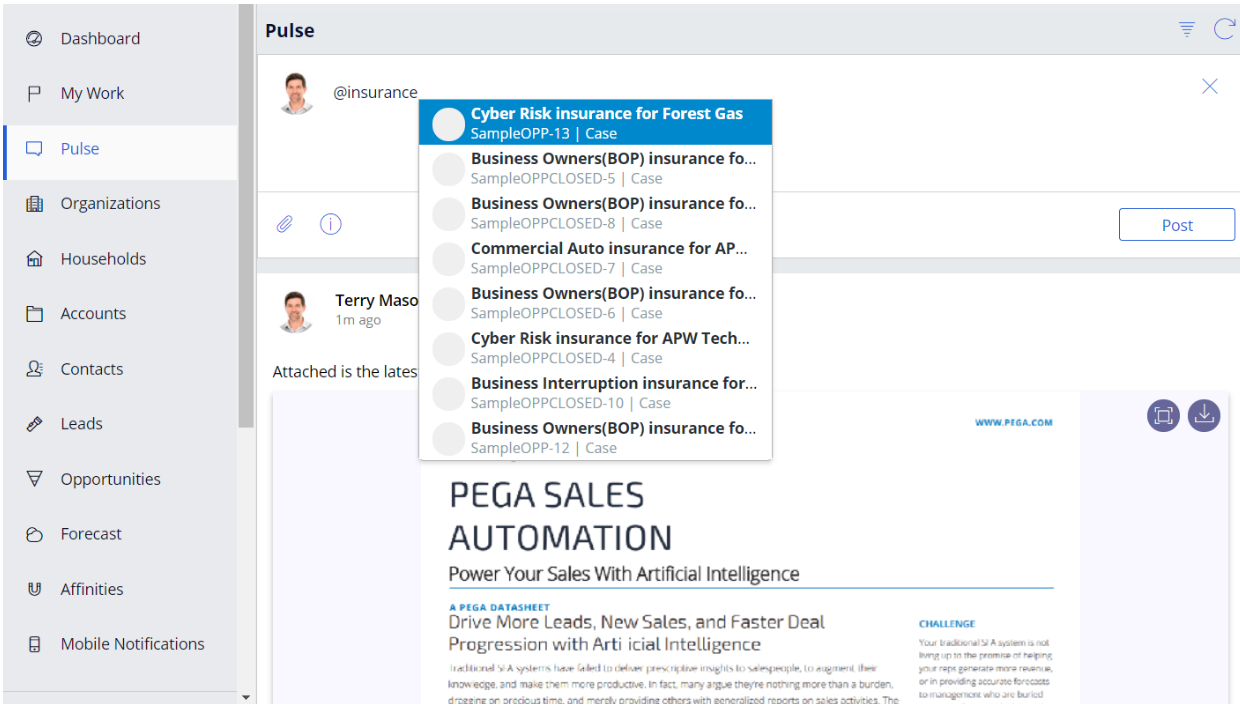
Sales collaboration with Pega Pulse

Pega Pulse in an internal social collaboration tool that allows sales reps to track important notes and posts in the context of Pega Sales Automation for Financial Services work objects. Whether sharing a file or requesting a discount, teams can collaborate and make the selling process a social experience.



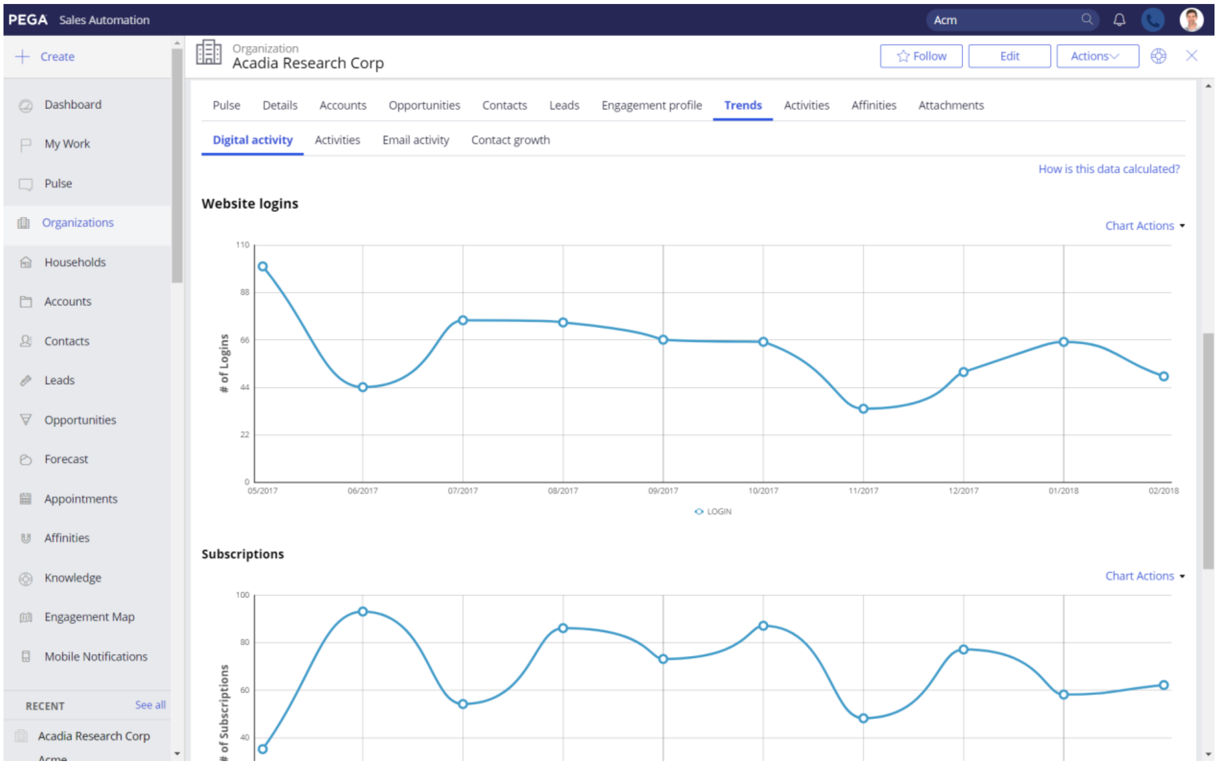
Reference objects in Pulse

Users can now reference Opportunities, Leads and Contacts in a pulse post. End-users can now also view the pulse post attachments inline. This applies to images, videos and pdf files attached to a pulse post.



Engagement trends

Graphical customer engagement trends provide visibility into customer engagement across multiple channels including Web activity, inbound and outbound email traffic, and sales activities of the rep. Data on engagement is gathered from Pega Sales Automation for Financial Services and from external databases and data warehouses.



Engagement maps

Sales Organizations typically use Sales Automation for Financial Services systems to nurture and manage the deals *in* their sales pipeline. Engagement maps help promote conversations around what is *not* in the pipeline by analyzing your product penetration levels across your territories and accounts to identify “white space.” Reps and managers can then focus their selling and marketing teams on these accounts for optimization of pipeline and share of wallet.

Engagement Map

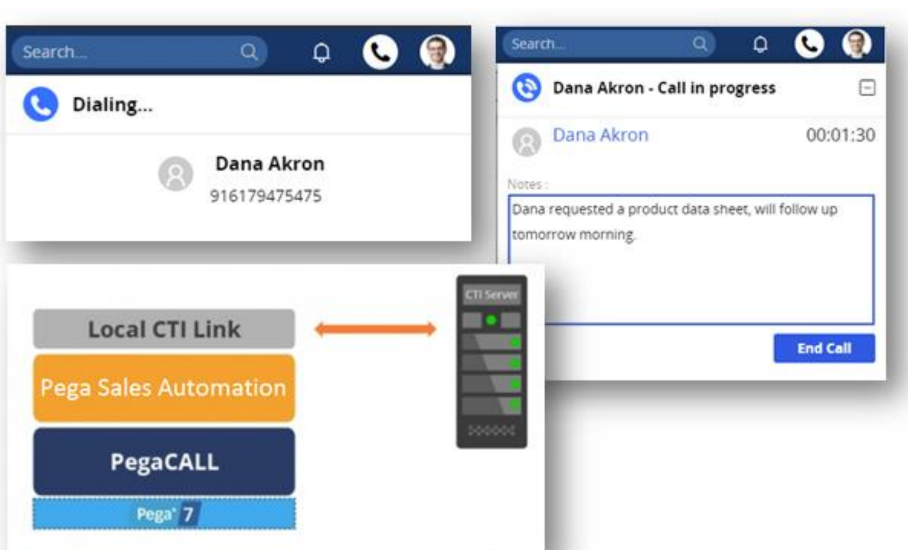
View by: Product Group
Selling mode: B2B

Filters:

Displaying 13 accounts			Wireless			Connected Safety ...		Collaboration Endp..	
Org/ Account	Territory	Account owner	Wireless LAN controllers 85%	Outdoor and Industrial access 92%	Indoor access points 83%	Access Control 36%	Video Surveillance 36%	Phones and desktop endpoints 17%	Room and Immersive systems 45%
Acadia Researc... Acadia Researc...	Northeast	Anna Lewis	ACTIVE	BLOCKED	N/A	N/A	N/A	N/A	N/A
Acadia Researc... Acadia Researc...	Northeast	Charles Perez	BLOCKED	BLOCKED	SOLD-ACTIVE	BLOCKED	—	—	—
Acme Software Acme Software	Northeast	Terry Mason	SOLD-ACTIVE	ACTIVE	—	—	—	—	ACTIVE
Adtrain Inc Adtrain Inc	Northeast	Terry Mason	SOLD	ACTIVE	ACTIVE	—	BLOCKED	ACTIVE	N/A
Advest Softwar... Advest Insuran...	Northeast	James Madison	ACTIVE	ACTIVE	BLOCKED	SOLD	N/A	—	BLOCKED
Advest Softwar... Advest Softwar...	Northeast	Alex Potter	SOLD-ACTIVE	SOLD-ACTIVE	SOLD-ACTIVE	BLOCKED	BLOCKED	—	—
Almon Brown Almon Brown	Northeast	Terry Mason	SOLD	—	—	—	—	—	—
APW Technolog.. APW Technolog..	Northeast	Terry Mason	—	ACTIVE	SOLD	—	—	—	ACTIVE
First West Insur.. First West Insur..	Northeast	Charles Perez	ACTIVE	SOLD	ACTIVE	—	—	—	—
P. Adams Reso... P. Adams Insur...	Northeast	James Madison	ACTIVE	ACTIVE	ACTIVE	N/A	BLOCKED	—	ACTIVE
P. Adams Reso... P. Adams Reso...	Northeast	Terry Mason	ACTIVE	ACTIVE	SOLD-ACTIVE	SOLD	—	BLOCKED	BLOCKED

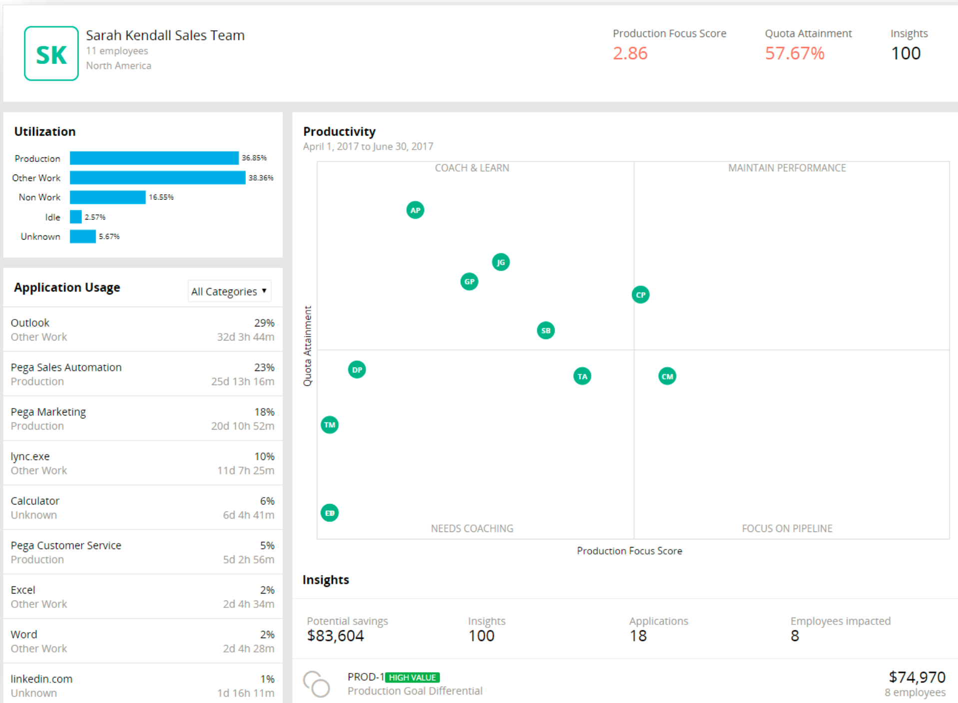
Pega Call

Integration with Pega Call make sales reps more effective with both inbound screen pops as well and outbound click-to-dial from any phone number field. An in-call modal dialogue facilitates easily logging call notes, with auto-creation of an activity when the call completes. Support for Open CTI as well as Avaya, Cisco, and Genesys CTI products.



Workforce intelligence

First in industry ability to optimize how work gets done across the enterprise by humans and robots, from a central platform. Coach sales teams based on insights captured by Workforce Intelligence and Robotics and optimize application usage across the desktop.



Lead capture forms

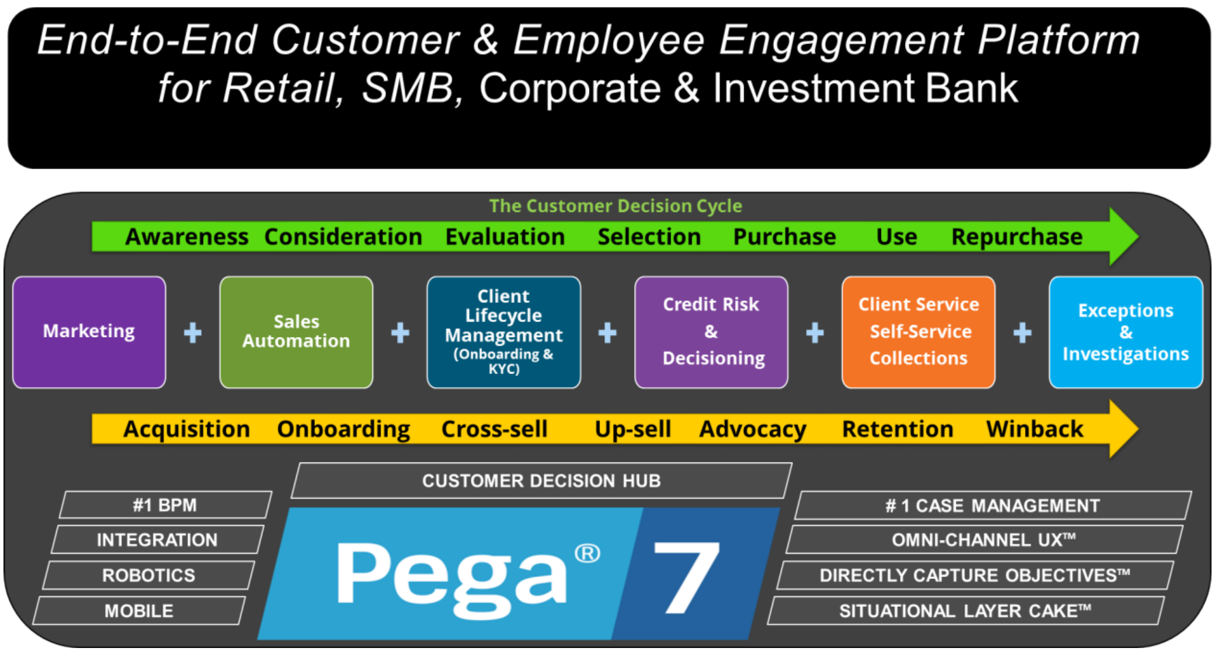
Online lead capture Web forms can be branded and embedded into any website to facilitate lead capture directly into Pega Sales Automation for Financial Services. Once submitted, the lead is immediately created in Pega Sales Automation for Financial Resources and can be routed to the appropriate sales rep using lead routing decision table and rules.

Co-Browse*

Sales Automation for Financial Services Co-Browse allows users to instantly collaborate using the web browser of customers and prospects. Easily launch a co-browse session from any contact in Pega Sales Automation for Financial Services. Sessions can be initiated by a customer with a session code, or by a sales rep via email. Modes include view only, highlight, and full keyboard control.

End-to-End Customer Relationship Management*

As part of the Pega Customer Relationship Management for Financial Services Suite, Pega Sales Automation for Financial Services can work with Pega Marketing for Financial Services and Pega Customer Service for Financial Services to support the entire customer journey. Pega can power a full transformation of the customer experience—incrementally integrating with existing assets at first, and then eventually replacing existing legacy Customer Relationship Management applications to take full advantage of the unified Pega Platform. (Pega Marketing for Financial Services and Pega Customer Service for Financial Services are licensed separately.)

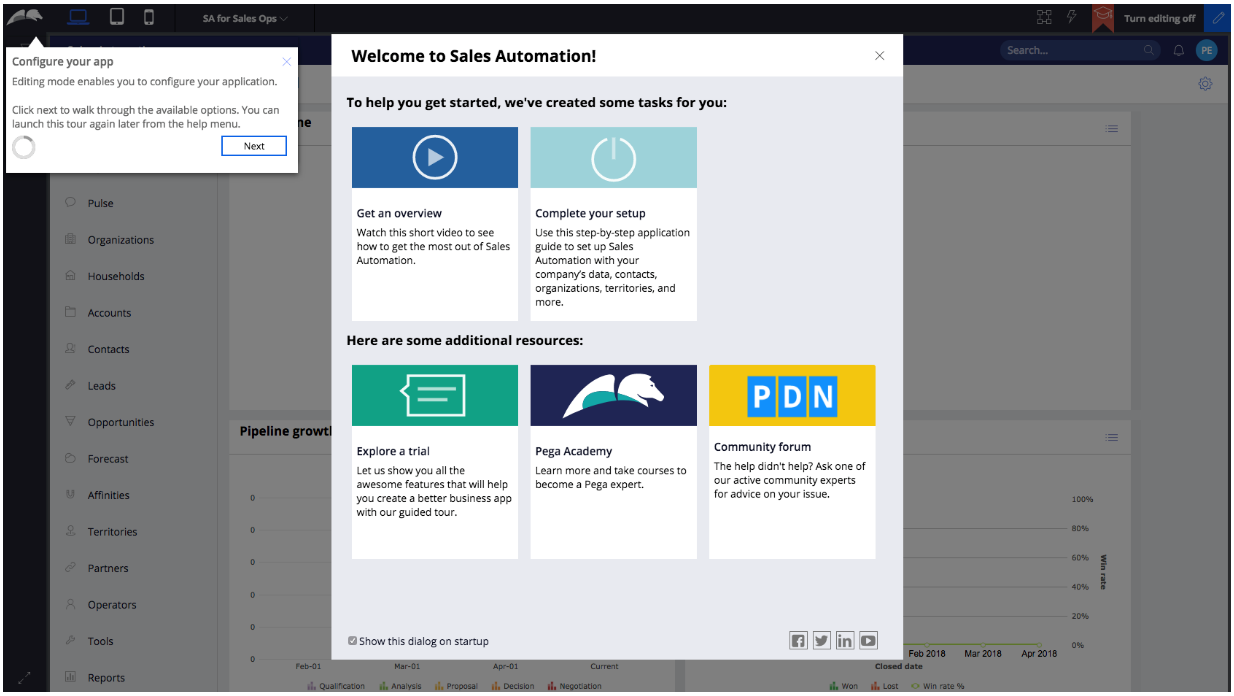


Multi-lingual support*

Language packs support localization by translating text values for buttons, prompts, labels, etc. The following language packs are available for Pega Sales Automation for Financial Resources: Italian, French, Japanese, German, and Portuguese.

30-day Express implementation

The new Application Wizard allows administrators to set up a new implementation in minutes, while new application guides provide step by step instruction for setting up features and importing data. From Pega Express, admins can easily customize their data model, configure the UI and change the sales process. Online trials allow anyone to request their own working instance of Pega Sales Automation for Financial Services with embedded tours to highlight key features.


SA for Sales Ops
Turn editing off
Search...
Configure your app
Editing mode enables you to configure your application.
Click next to walk through the available options. You can launch this tour again later from the help menu.
Next
Pulse
Organizations
Households
Accounts
Contacts
Leads
Opportunities
Forecast
Affinities
Territories
Partners
Operators
Tools
Reports
Pipeline growth
Welcome to Sales Automation!
To help you get started, we've created some tasks for you:
Get an overview
Watch this short video to see how to get the most out of Sales Automation.
Complete your setup
Use this step-by-step application guide to set up Sales Automation with your company's data, contacts, organizations, territories, and more.
Here are some additional resources:
Explore a trial
Let us show you all the awesome features that will help you create a better business app with our guided tour.
Pega Academy
Learn more and take courses to become a Pega expert.
PDN
Community forum
The help didn't help? Ask one of our active community experts for advice on your issue.
Show this dialog on startup

3 Sales Automation for Financial Services entities

Pega-provided standard Pega Sales Automation for Financial Services application entities

The following table lists the standard entities available in the Pega Sales Automation for Financial Services application.

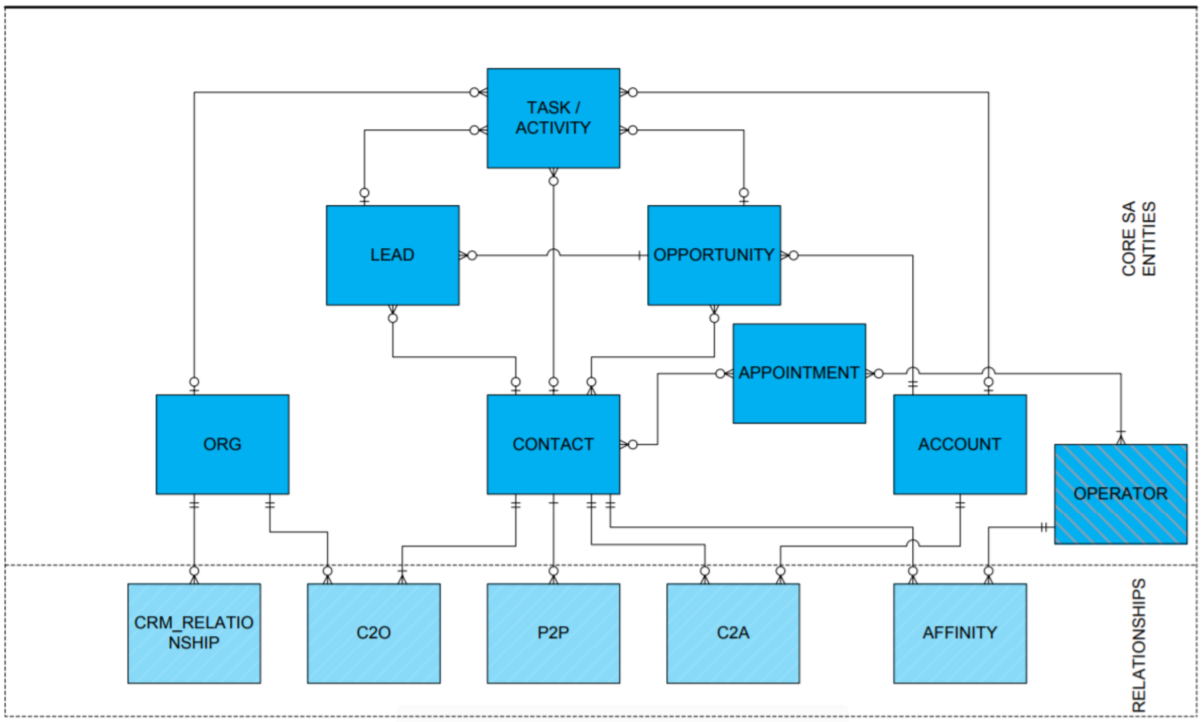
Cases	Description
Organization	An organization represents the levels of the customer business hierarchy. The organization can be a specific business, holding company, or corporation and has one or more organizations or accounts as a child entity.
Account	An account is an economic decision-making unit. It Is a logical or physical group to which a product or service is sold. This would typically be used for Commercial Banking.
Contact	A contact is a person that is a prospect or customer. For business selling, they are usually employees of the organization to whom you are selling. For Individual selling, they are the person interested in making a personal purchase.
Households	A household is a grouping of contacts with the ability to identify a contact as the head of household.
Leads	A lead is a prospect that is nurtured through a qualification process. They are usually sourced via tradeshows, Web form, or campaigns. Once qualified, they can be converted to a contact or opportunity.
Opportunities	An opportunity is a qualified deal that you track, nurture, and manage. Opportunities are the foundation of the sales pipeline, goal attainment, and forecast. Opportunity processes are provided for Retail Banking and Small Business Banking which can be extended for other market segments.
Close Plans	Weekly updates summarizing accomplishments for the current week, and plans for the coming week.
Activity	Activities capture interactions with customers, such as phone calls, meetings, and co-browse sessions.
Task	Tasks are to-dos for the sales team on which to follow up.

4 Data model

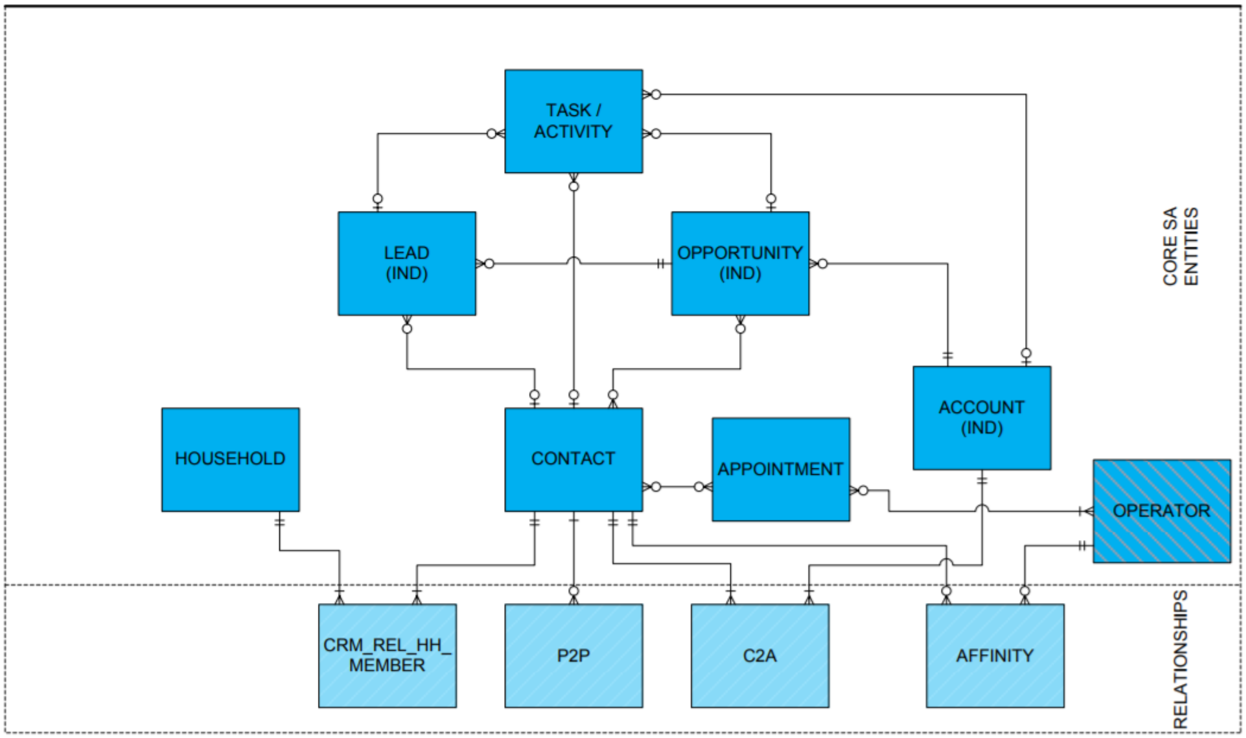
Logical Data Relationship Model

The Pega Sales Automation for Financial Services data model supports both B2B and B2C selling modes. B2B selling allows customers to model their prospects and customers as business organizations, accounts, and contacts. For B2C selling, the account/contact structure is simplified for selling directly to individuals and, optionally, to households.

Commercial and Small Business - B2B selling mode



Retail and Wealth Management - B2C selling mode



5 Roles, portals, and dashboards

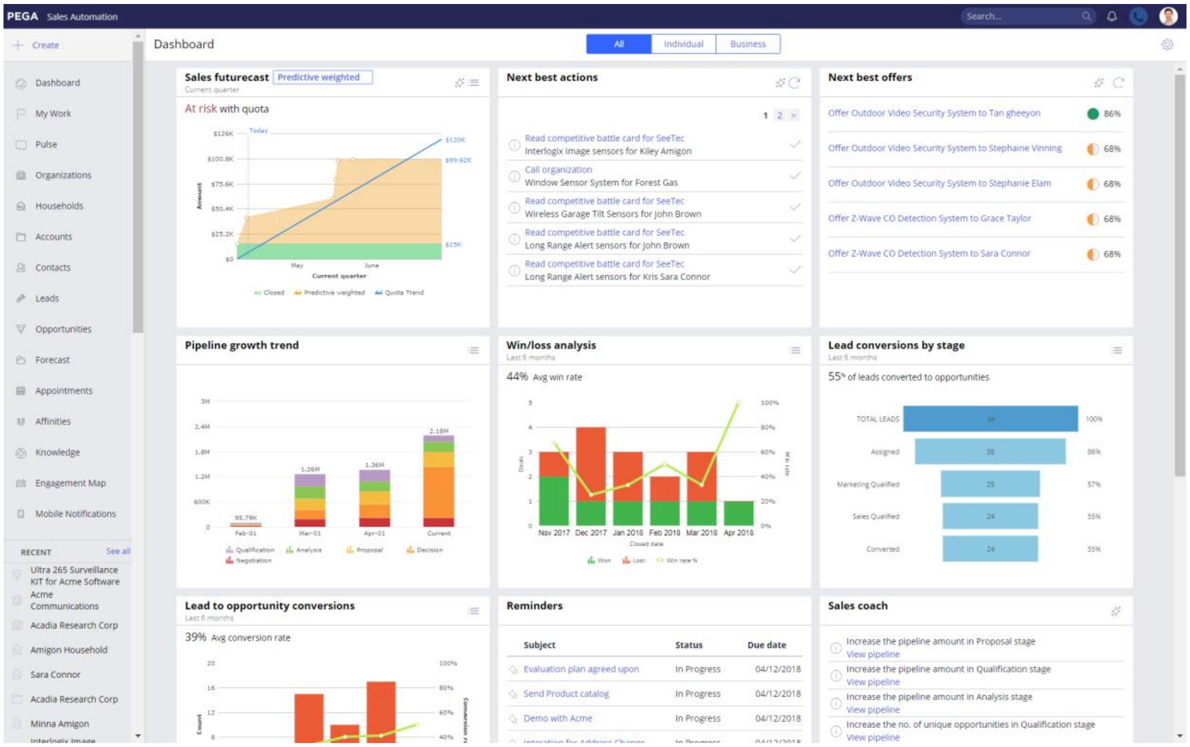
Pega Sales Automation for Financial Services roles

The following table describes each of the Pega-provided roles in the Sales Automation for Financial Services application, their default portal, and description.

Role	Description	Default portal
Sales Representative (Financial Advisor or Relationship Manager)	Sales Reps manage their Lead and Opportunity pipeline including all communications with prospects and customers.	Sales Rep Portal
Sales Manager	Sales Managers manage teams, monitoring overall performance, and collaborate with their teams.	Sales Manager Portal
Sales Operations	Sales Ops are responsible for supporting the sales team by managing Territories and Users and administering data.	Sales Ops Portal
Admin	An Administrator is responsible for managing the complete application.	Developer Portal

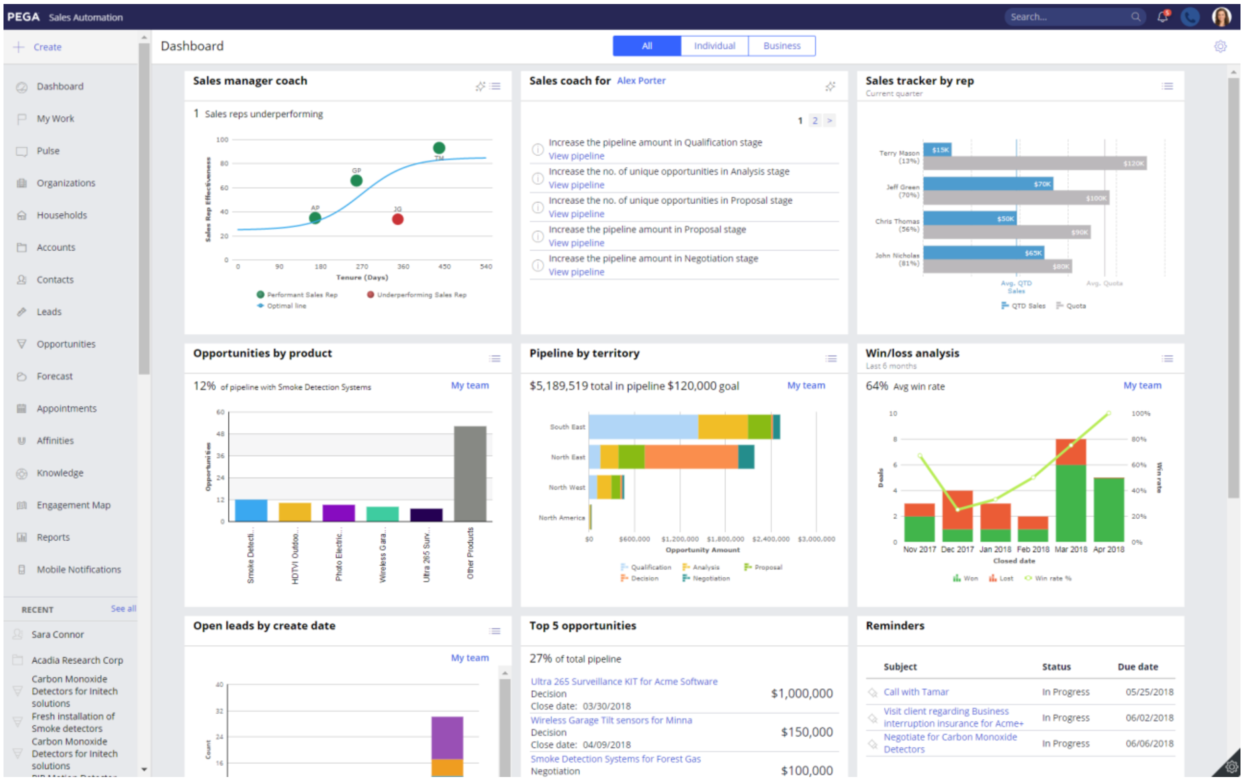
Sales Rep portal

The Sales Rep portal is where the sales team performs their day-to-day sales activities. Gauging their business using the dashboard, qualifying new leads, and being guided through the stages of an opportunity are all typical actions performed in the portal. Sales reps can also adjust the sales forecast and track all communications with prospects and customers.



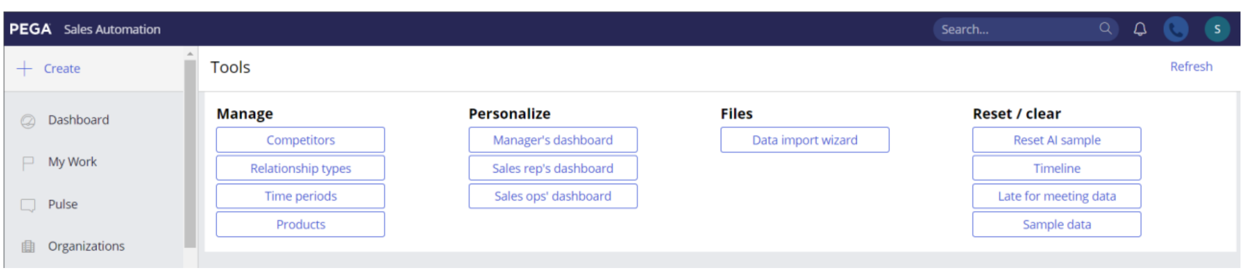
Sales Manager portal

The Sales Manager portal provides insights into the team's sales pipeline and performance while enabling cross-team collaboration. Managers can analyze their business using the sales manager dashboard, gauging key metrics across the team with the ability to drill into the details of individual sales reps.



Sales Ops portal

The Sales Ops portal provides visibility to all sales data while also enabling business users to administer sales territories, publish dashboards, grant operator permissions, and set sales goals. The bulk upload data utility allows ops users to upload data from .csv or .xml files.



Add widgets and publish dashboard