

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

Name	Industry	Employees	Revenue	Target	Customer	Owner	Territory
123 Investment Consulting	Financial Services	0	\$0.00		✓	Rodney Williamson	East Boston Branch - Small Business
ABC Company	Financial Services	0	\$0.00		✓	Remmy Smalls	Boston - Small Business
Acadia Research Corp	Financial Services	2,070	\$1,962,000.00			Remmy Smalls	Beacon Hill Branch - Small Business
ACME Drugs	Healthcare	100	\$887,000.00			Remmy Smalls	Beacon Hill Branch - Small Business
Adams P	Insurance		\$0.00			Remmy Smalls	Boston - Small Business
Adtrain Inc	Government	100	\$985,000.00			Remmy Smalls	South Boston Branch - Small Business
Alman Bioscience Inc	Healthcare	100	\$887,000.00			Remmy Smalls	Beacon Hill Branch - Small Business
Ambitron Inc	High Tech	80	\$305,000.00			Remmy Smalls	Boston - Small Business
AUS Technologies	Financial Services	0	\$0.00		✓	Ruby Gray	East Boston Branch - Small Business
Avid Optics	High Tech	10	\$912,000.00			Remmy Smalls	South Boston Branch - Small Business
Azaria Jewelers	Financial Services	0	\$0.00		✓	Ruby Gray	East Boston Branch - Small Business
Bank of New York	Financial Services	530	\$469,000.00			Remmy Smalls	Beacon Hill Branch - Small Business
Bell Corp Llc	Manufacturing	10	\$918,000.00			Remmy Smalls	South Boston Branch - Small Business
Bike Wheels LLC	Financial Services	0	\$0.00		✓	Rodney Williamson	East Boston Branch - Small Business
BizCom	Financial Services	0	\$0.00		✓	Ruby Gray	East Boston Branch - Small Business
Business convert lead	Financial Services		\$0.00			Remmy Smalls	Boston - Small Business
Business ConvertLead Org	Financial Services		\$0.00			Remmy Smalls	Boston - Small Business
California Sports, Inc.	Financial Services	0	\$0.00		✓	Rodney Williamson	East Boston Branch - Small Business

Organization detail

PEGA Sales Automation For Financial Services Sample App

Search...

Joe's Flower Shop ORG: 112 **SOLD** [Follow](#) [Edit](#) [Actions](#)

Client type: **Customer** since 1/1/2000

Sentiment (NPS): **Great**

Total assets & liabilities: **\$134,415**

Primary contact: **Joe Timble**

Industry: **Retail**

Industry Target: **Top-Target**

Employees: **0**

Organization phone #: **786-555-8177**

Website: **--**

[View additional details](#)

Owner: **Remmy Smalls**

Territory: **Boston - Small Business**

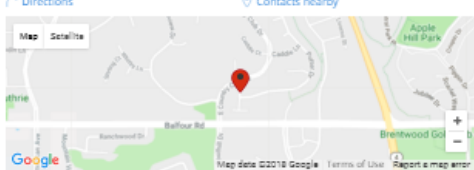
Business Type: **Small business**

Potential Value: **---**

Social channels: [Twitter](#) [Facebook](#) [LinkedIn](#)

Address (Primary Address): **45 E Liberty St, Palm Beach FL 33125, United States**

[Directions](#)



Contacts nearby

Description: Joe's Flower Shop an international company operating out of the Florida area. With revenues of \$626K and 70 employees, they are a growing player in their industry. They should have growing services needs that we can meet.

SALES NAVIGATOR Saved

Pegasystems

Computer Software

1001-5000 employees - Greater Boston Area

See all 3,934 employees on LinkedIn →

[View account](#)

Recommended Leads

Terry Mason

Sales Automation at Pegasystems

New York, New York

[Save in Sales Navigator](#)

Rupen Shah 3rd

VP, Global EV Alliances and Strate...

San Francisco Bay Area

[Save in Sales Navigator](#)

Harald Esch 3rd

Geschäftsführer und VP Sales DAC...

Munich Area, Germany

[Save in Sales Navigator](#)

Dean Webster 2nd

VP Product Operations at Pega...

Greater Boston Area

[Save in Sales Navigator](#)

Tom Bachmann 3rd

VP Digital at Pegasystems

Greater Boston Area

[Save in Sales Navigator](#)

James Alderson 2nd

Senior Manager - Solution Consult...

Charlotte, North Carolina Area

[Save in Sales Navigator](#)

Open tasks

- Review 30 day satisfaction with loan**
- Joe's Flower Shop (ORG-112)
- Overdue: 1mo ago - Remmy Smalls

- Visit client to review new rates**
- Joe's Flower Shop (ORG-112)
- Overdue: 1mo ago - Remmy Smalls

- Review overall portfolio balance**
- Joe's Flower Shop (ORG-112)
- Overdue: 18d ago - Remmy Smalls

[See all tasks](#)

Recent interactions

- Visit client to review new rates**
- Joe's Flower Shop (ORG-112)
- 2 months 13 days ago by Remmy Smalls

- Followed up with the client regarding satisfaction**
- Joe's Flower Shop (ORG-112)
- 2 months 13 days ago by Remmy Smalls

- Review overall portfolio balance**
- Joe's Flower Shop (ORG-112)
- 2 months 13 days ago by Remmy Smalls

[See all interactions](#)

Next best actions

- [In Person Visit](#)
- [Drive digital activity](#)

Top offers

- U+ Voyager** 52%
- First Mortgage** 44%

Sales details Accounts & services Activity Contacts Org's activity Documents Trends Affinities

Open opportunities

Name	Stage	Owner	Amount	Close date	Must win	Territory
Loan for Business Expansion	Closed	Remmy Smalls	\$100,000.00	07/18/18		Boston - Small Business
Loan for Joe's expansion	Proposal	Remmy Smalls	\$1,050,000.00	06/28/18		Boston - Small Business
New opportunity for Joe	Qualification	Remmy Smalls	\$5,000.00	06/24/18		Boston - Small Business
Orchids for Joe Flower	Closed	Remmy Smalls	\$50,000.00	05/31/18		Boston - Small Business
Products for Joe	Closed	Remmy Smalls	\$6,000.00	07/31/18		Boston - Small Business
Products for Joe's Flowers	Closed	Remmy Smalls	\$10,000.00	07/17/18		United States - Small Business
Products for Joe Timble	Closed	Remmy Smalls	\$50,000.00	07/31/18		Boston - Small Business

[See all opportunities](#)

Open leads Owned by me Referred by me All open

Contact home

PEGA Sales Automation For Financial Services Sample App

Contacts

Filter contact Filter Find contacts near me Export Refresh

Name	Title	Work email	Work phone	Favorability	Customer	Gender	Territory	Organization
Chris Adams		cadams@ca.com					Boston - Small Business	Adams P
Paul Adams		padams1@gmail.com	3490964099	✓			East Boston Branch - Small Business	
Robert Adams	Implem Manager	RAdams1@gmail.com	8798193345	✓		M	East Boston Branch - Small Business	
Bianca Albescu		bianca.albescu1@gmail.com		✓		F	East Boston Branch - Small Business	
Mohammed Ali	CFO	ali.mohammed.mail.07@gmail.com		✓		M	East Boston Branch - Small Business	
Billy Allen	VP Sales	BillyAllen0071@gmail.com	6172221248	✓		M	Boston - Small Business	
Valerie Allen	HVAC engineer	ValerieAllen1@army5py.com	6462155329	✓		F	East Boston Branch - Small Business	
Juanita Alvarez		JuanAlvarez1@gmail.com		✓		F	East Boston Branch - Small Business	
Arthur Andersson	CFO	arthur1@gmail.com		✓		M	East Boston Branch - Small Business	
Dina Andropov		DinaA1@gmail.com		✓		F	East Boston Branch - Small Business	
Jason Anne		biggs21@hotmail.com		✓		F	East Boston Branch - Small Business	

Contact detail

PEGA Sales Automation

Acme Software > Acme Software > Contact

Sara Connor ★ Unfollow Edit Actions

Mobile phone 1 617 947 5475	Work phone 1 617 555 3212	Work email sconnor150@acmesoft123.net	Client type Customer
First name Sara	Last name Connor	Salutation Ms.	Territory North East
Organization Acme Software	Account Acme Software	Primary individual account Sara Connor	Title Senior Director
Management Level 0	Department 6	Reports to Kris Marrier	Favorability rating 1-Promoter
Influence rating 1-High	Gender Female	Marital status Single	Birth date 5/4/1980
Personal phone 1 617 555 9011	Personal email sconnor150@gmail.com		

Responsibility

Pulse **Details** Relationships Opportunities Leads Timeline Engagement profile Households Activities Attachments

Addresses

Business Address (Primary)
120 Broadway
Cambridge MA 02142
United States

Primary address map

Get directions Contacts in vicinity

Social

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.

The screenshot displays the PEGA Sales Automation For Financial Services interface. The main content area shows the profile for 'Sullivan Household' (HH-12). The profile includes fields for Name, Active member count (6), and Phone number. Below this is a description and an address section with a map of the location in Boston. The 'Members' tab is active, showing a table of household members.

First name	Last name	Role	Start date	End date
Kathleen	Sullivan	Family Spouse	05/03/2018	
Cindy	Sullivan	Family Member - Daughter in Law	05/03/2018	
Daniel	Sullivan	Family Child	05/03/2018	
David	Sullivan	Family Member - Grand Child	05/03/2018	
Jennifer	Sullivan	Family Child	05/03/2018	
Julia	Sullivan	Family Child	05/03/2018	

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.

PEGA Sales Automation

Acme Software > Acme Software > Contact

Sara Connor

Unfollow Edit Actions

Mobile phone 1 617 947 5475	Work phone 1 617 555 3212	Work email sconnor150@acmesoft123.net	Client type Customer
First name Sara	Last name Connor	Salutation Ms.	Territory North East
Organization Acme Software	Account Acme Software	Primary individual account Sara Connor	Title Senior Director
Management Level 0	Department 6	Reports to Kris Marrier	Favorability rating 1-Promoter
Influence rating 1-High	Gender Female	Marital status Single	Birth date 5/4/1980
Personal phone 1 617 555 9011	Personal email sconnor150@gmail.com		

Responsibility

Pulse Details Relationships Opportunities Leads Timeline Engagement profile Households **Activities** Attachments

Activities

Subject	Communication type	Date	Completed by
Interaction for Contact Sara Connor	Phone	6/10/2018	Terry Mason
Prepare contract for Acme	Phone	6/10/2018	Terry Mason
Interaction for Contact Sara Connor	Phone	6/2/2018	Terry Mason
Setup on site meeting	Phone	6/2/2018	Terry Mason
Offer "Photo Electric Smoke Detectors" Accepted	Phone	5/28/2018	Terry Mason
Interaction for Contact Sara Connor	Phone	2/2/2018	Terry Mason
Meet in person for a demo	In Person	5/11/2018	Terry Mason
Send proposal documents	Phone	5/6/2018	Terry Mason

Details Relationships Opportunities Leads **Timeline** Engagement profile Households Activities Affinities Attachments Followers

Marketing Sales Service

Range

24HR 1W 1M 3M 6M 1Y

October 2017

Task
Follow up

Type Client Visit
Status In Progress
Priority 1-High
Owner Terry Mason
[More details](#)

Lead management

Pega Sales Automation for Financial Services enables organizations to manage leads from initial capture and routing, through the qualification process, and ultimately through 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

Top 3 predictors affecting lead score

Predictor	Value
Rating	⊖
Contact Age	⊖ NA
Website Visit Count	⊖ 0

Lead ranking AI model

Top 8 predictors

Score: 91%

Source

Bin	Predictor value	Propensity
1	Global Programs	2%
2	Field Marketing	27%
3	BGR Marketing	68%
4	Residual: Analyst Referral, Tradeshow, Outbound, Partner Referral, Email, Inbound, Direct Mail, Customer Radiation, Partner Marketing, Contact Us, Employee Referral, Sales Consulting, Customer Referral, Remaining symbols	64%

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

The screenshot displays the Pega Opportunity home page dashboard. At the top, there are tabs for 'Stage view' and 'List view', and a 'Create opportunity' button. The main content area shows a summary of 8 opportunities with a total amount of \$45,500.00. Below this, there is a filter bar with a search box, a 'Filter' button, and a 'Sort by' dropdown set to 'Name'. There are also buttons for 'Individual', 'Business', and 'Refresh'. The main area is divided into five columns representing the sales stages: Qualification (2), Analysis (3), Proposal (1), Decision (1), and Negotiation (1). Each column contains a list of opportunities with their respective amounts and dates.

Qualification	Analysis	Proposal	Decision	Negotiation
\$14,800.00 eShield Term Insurance for Kiley Amigon \$6,800.00 Oct 30, 2017	\$7,000.00 eShield Term Insurance for Ian Thomas \$3,000.00 May 27, 2017	\$7,200.00 Life stage protection for Laurel Reitter \$7,200.00 Oct 29, 2017	\$7,500.00 Micro Insurance for Marguerita Hiatt \$7,500.00 Oct 30, 2017	\$9,000.00 Micro Insurance for John Smith \$9,000.00 Oct 30, 2017
\$8,000.00 Life stage protection for Marguerita Hiatt Nov 30, 2017	\$2,000.00 Group protection for Laurel Reitter Jan 25, 2017			
	\$2,000.00 Life Super term plan for John Smith Oct 28, 2017			

Opportunity detail

The screenshot displays the Pega Sales Automation For Financial Services interface. The main content area shows the details for an opportunity named 'Products for Deposits' (OPP-10020) under the 'Joe's Flower Shop' organization. The opportunity is currently in the 'Analysis' stage of a five-stage process: Qualification, Analysis, Proposal, Decision, and Closed. A table lists the qualification steps: 'Gather credit info' (Completed), 'Compliance checklist' (Completed), 'Needs and Offers' (In Progress), and 'Capture additional Information' (Not Started). Below this, a metadata table provides details such as Amount (\$10,000.00), Close date (06/08/2018), Probability (25%), Owner (Remy Smalls), Primary contact (Joe Timble), Territory (Boston - Small Business), Opportunity must-win (No), Organization (Joe's Flower Shop), Source (Website), and Age (26). The 'Opportunity insights' section features three charts: 'Move to next stage' showing a 99% likelihood (4% deviation), 'Win probability' showing a 95% likelihood (Ready), and 'Close date' showing a 'Delayed' status (Q2).

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

The screenshot shows the PEGA Sales Automation Forecast gadget. The main view is a table of forecast categories for North East territory in FY 2018. A tooltip is visible over the '4Q Subtotals' row, showing a breakdown of Unweighted, Predictive, and Weighted values, with a 323% variance.

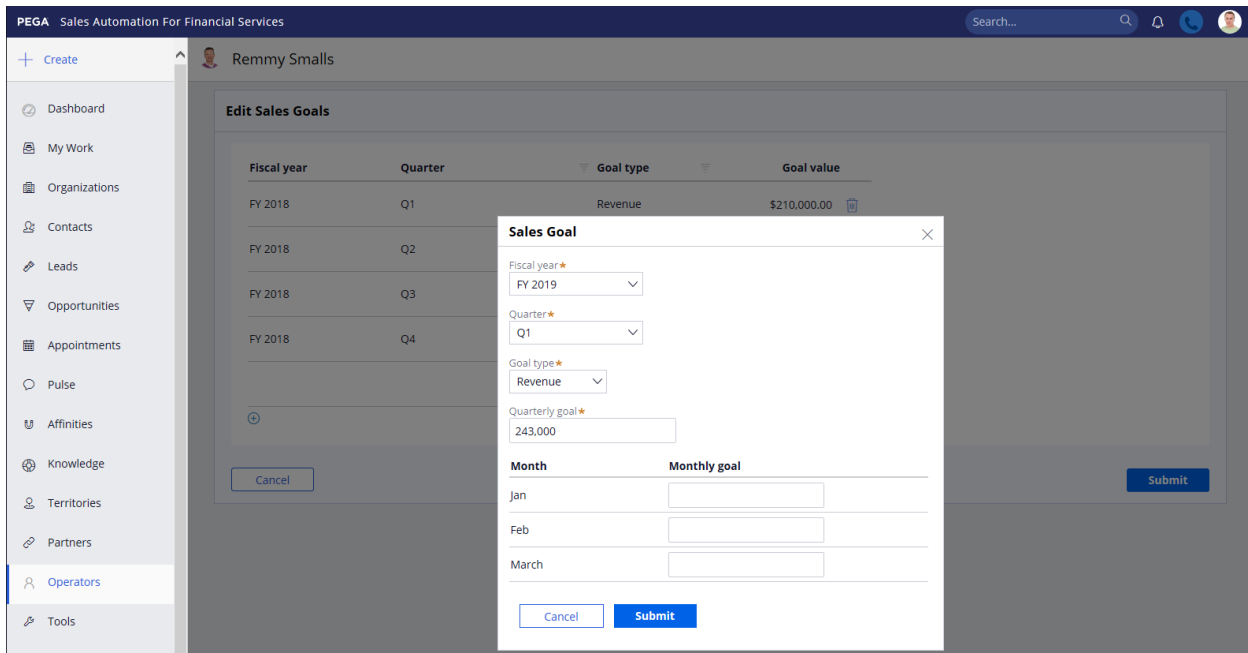
Forecast category	2018 Q1	2018 Q2	2018 Q3	2018 Q4	Total
Closed + Commit	2,131,070	32,075	100,000	-40,000	2,303,145
Goal	120,000	120,000	120,000	120,000	480,000
Closed	21,070	22,075	-	-	43,145
Commit	2,110,000	10,000	100,000	-40,000	2,260,000
Upside	217,000	150,000	-	-	367,000
Stretch	70,000	128,000	-	-	298,000
4Q Subtotals	2,418,070	310,075	150,000	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

2018 Q1 Opportunities by Stretch Category: \$70,000

Name	Amount	Account	Category	Level	Owner
Wireless Garage Tilt S...	\$25,000	Sara Connor	Stretch	North East	Terry Mason
Carbon Monoxide Detect...	\$20,000	APW Technologies	Stretch	North East	Terry Mason
Window Sensor System f...	\$25,000	Forest Gas Corp	Stretch	North East	Terry Mason

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.



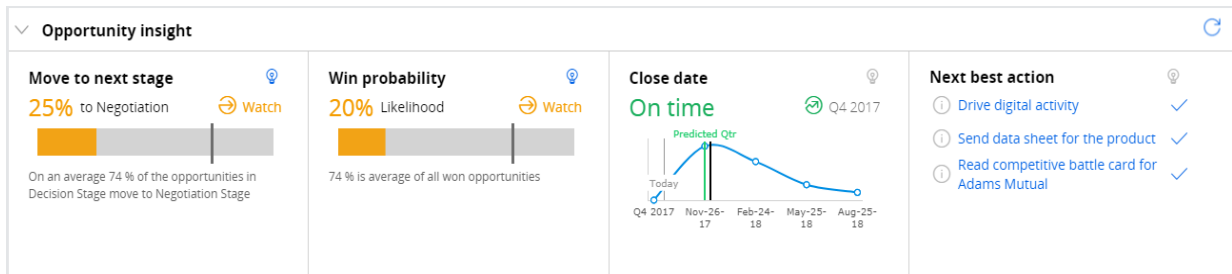
Pega Sales Automation for Financial Services mobile

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.

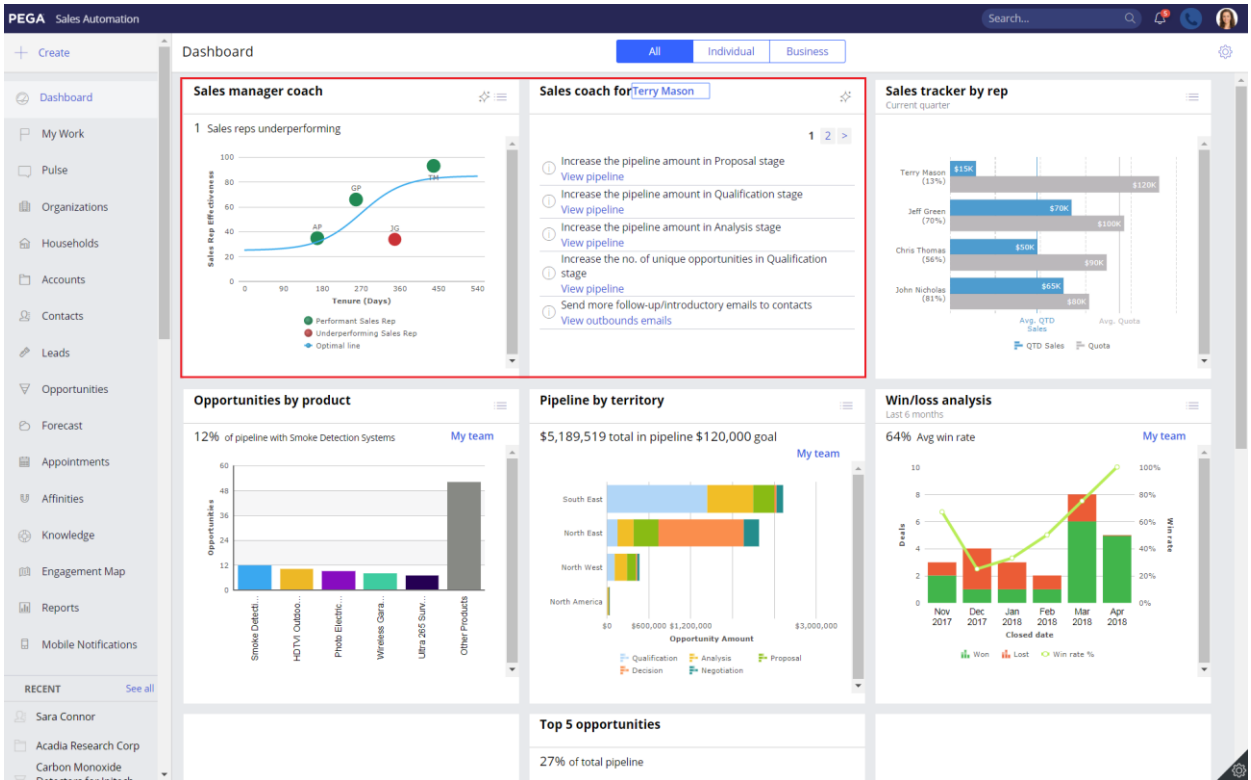


Artificial Intelligence-based insights

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.

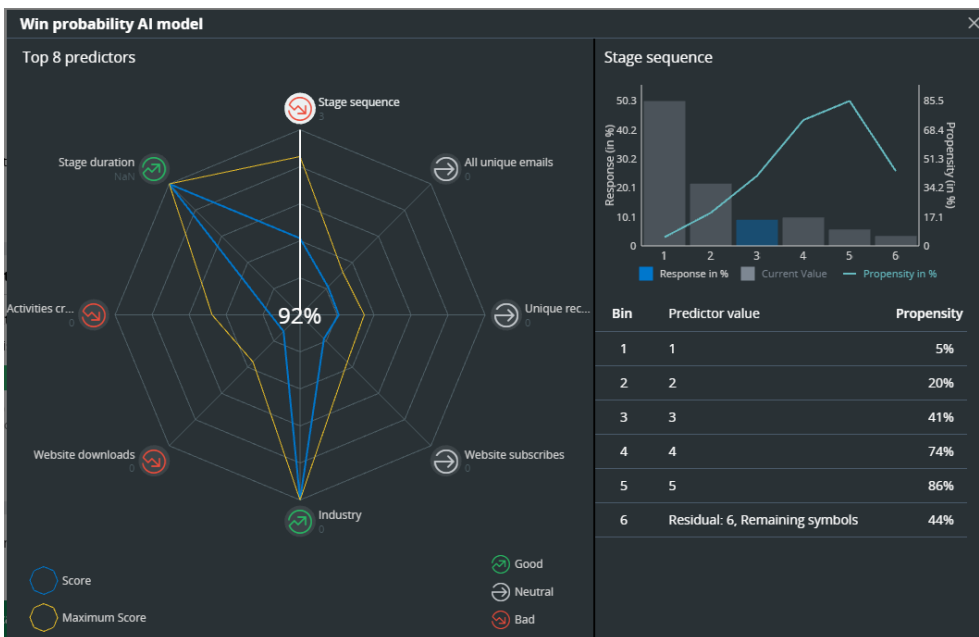


Sales manager coach widgets use AI to monitor sales team performance and provide coaching advice for the sales manager to get their teams back on track.



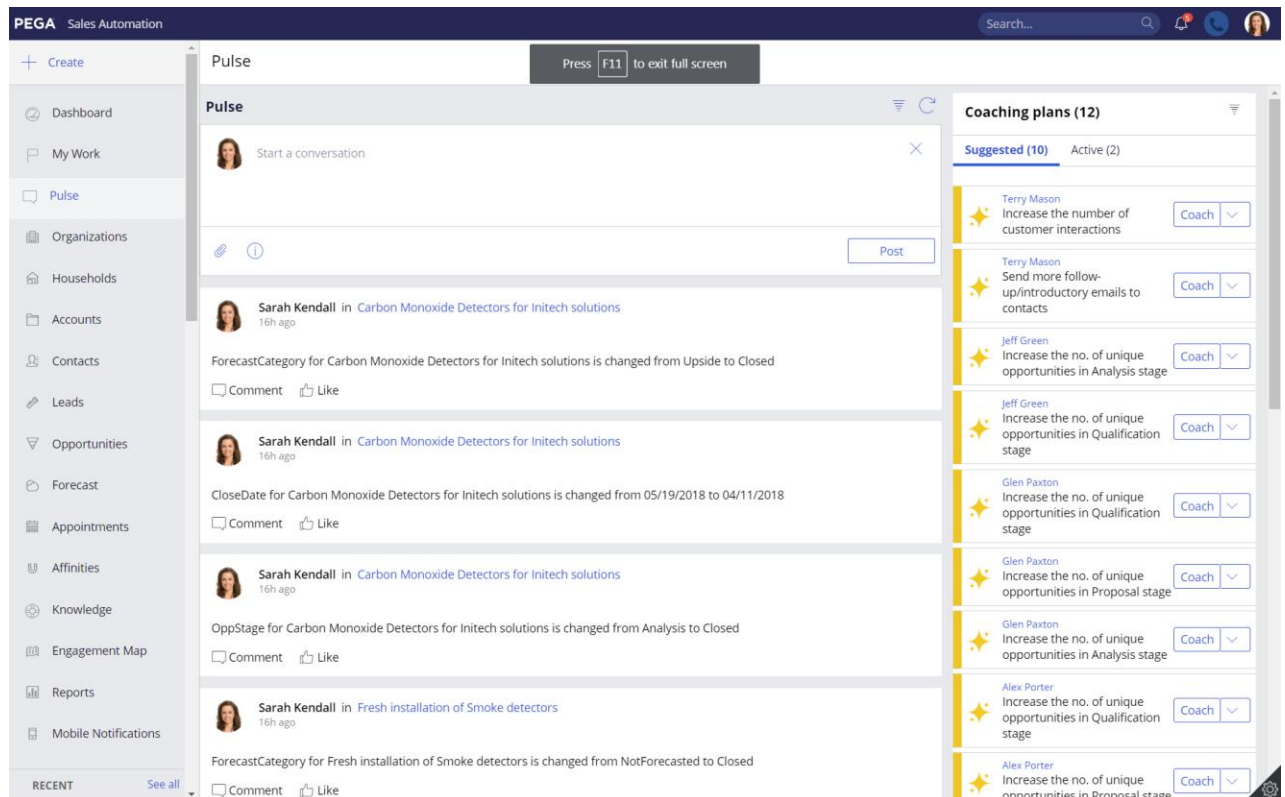
Adaptive model-based lead scoring that helps sales reps prioritize lead follow up

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



Sales coaching via Pulse

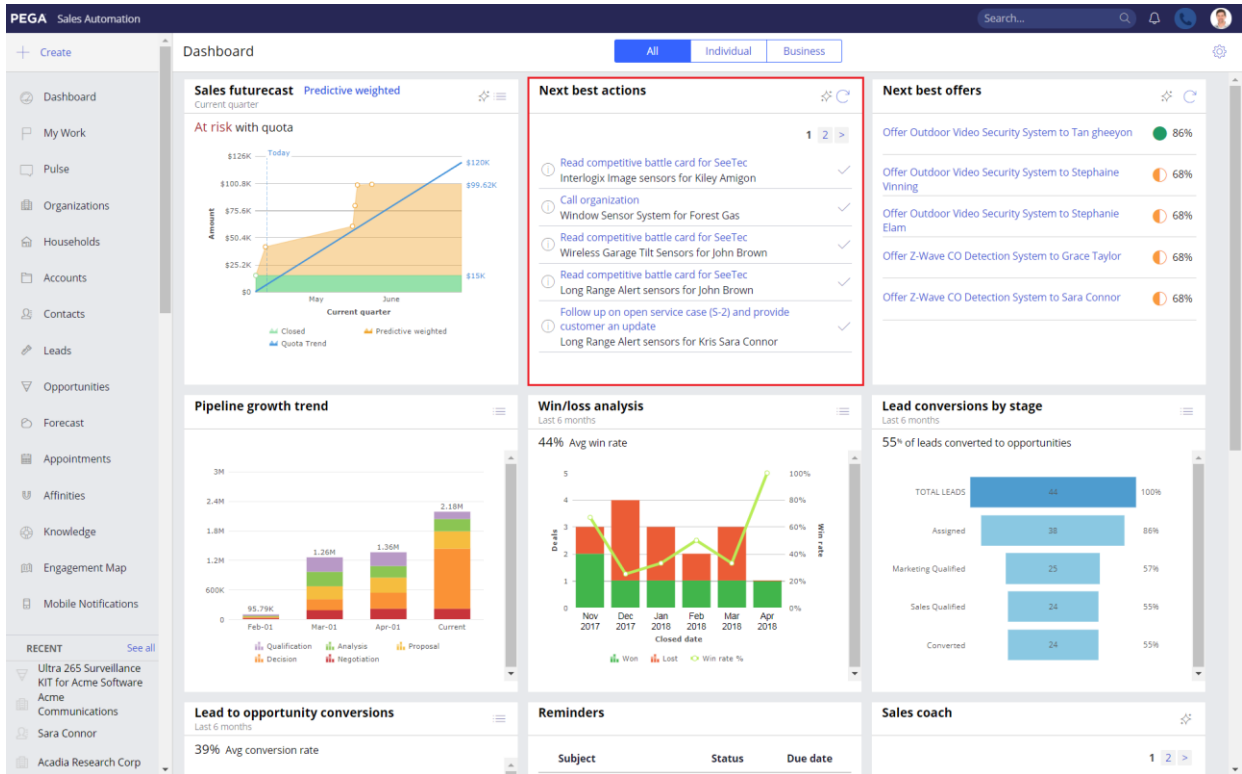
Sales Coach in Pulse is designed to enable Sales Managers to seamlessly deliver efficient coaching. The widget will display coaching recommendations for all the Sales Reps reporting to a Manager if different areas. Managers can then devise personalized 'Coaching Plans' for each of these coaching recommendations. 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.



The screenshot displays the PEGA Sales Automation interface. On the left is a navigation sidebar with options like Dashboard, My Work, Pulse, Organizations, Households, Accounts, Contacts, Leads, Opportunities, Forecast, Appointments, Affinities, Knowledge, Engagement Map, Reports, and Mobile Notifications. The main area is titled 'Pulse' and contains a 'Start a conversation' button and a 'Post' button. Below this are several posts from Sarah Kendall, each detailing a change in a sales opportunity's forecast category or stage, such as 'Carbon Monoxide Detectors for Initech solutions' and 'Fresh installation of Smoke detectors'. On the right side, there is a 'Coaching plans (12)' widget, which is divided into 'Suggested (10)' and 'Active (2)' sections. The 'Suggested' section lists ten coaching recommendations, each with a star icon, a name, a description, and a 'Coach' button with a dropdown arrow. The recommendations include actions like 'Increase the number of customer interactions', 'Send more follow-up/introductory emails to contacts', and 'Increase the no. of unique opportunities in various stages'.

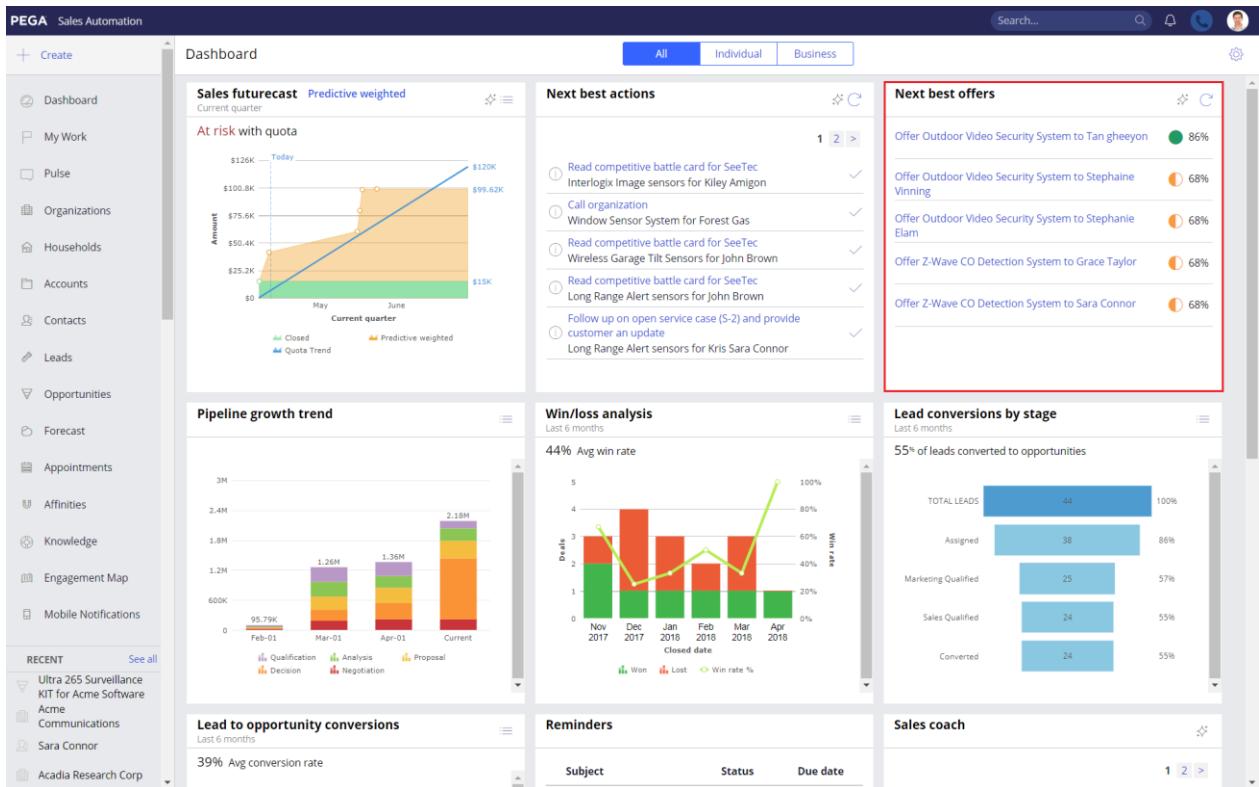
Next Best Action for opportunities

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	Fulfillment 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.

The screenshot displays the PEGA Sales Automation For Financial Services interface. The top navigation bar includes the PEGA logo, the text 'Sales Automation For Financial Services', a search bar, and user profile icons. Below this, the breadcrumb trail shows 'Joe's Flower Shop » Expansion for Joe's shop' and 'Expansion for Joe's shop OPP-10039'. The main workflow is shown as a sequence of steps: Qualification (checked), Analysis (active), Proposal, Decision, and Closed. The 'Needs And Offers' section is open, showing 'Credit product 1'. Under 'Needs criteria', the Purpose is 'Expansion/renovation', Amount needed is '\$25,000', Funds disbursement is 'All at once', and Secured capital is 'Equipment'. The '2 Credit top offer(s)' section lists two offers: 'MasterCard World' (TOP OFFER) with details 'Earn unlimited miles on every purchase ! Current APR: 15.24%, \$95 annual fee' and 'First Mortgage' (TOP OFFER) with details 'Buy your first home ! Current APR 5.4%'. Both offers have a 'Select' button. At the bottom of the form, there are 'Clear', 'Apply', 'Cancel', 'Save & close', and 'Submit' buttons.







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.

Products & services

[Top offers](#) [Lending](#) [Deposits](#) [Cards](#) [Services](#) [Others](#)

16 matching products

	First mortgage 15 year ⓘ Financing with a fixed-rate ! Current APR: 2.5%	Select
	Adjustable rate mortgage ⓘ Take advantage of lower interest rates. Current APR 3.7% , Annual fee USD 995	Select
	New Auto Loan ⓘ Auto loan for your new vehicle offering great rates, convenience and flexibility. Current APR: 2.29%	Select
	First Mortgage ⓘ Buy your first home ! Current APR 5.4%	Select
	Personal loan ⓘ Personal loans with competitive fixed rates and term up to 60 months to help consolidate debt and reduce monthly payments. Current APR: 12.55%, \$35 monthly fees	Select
	New boat loan ⓘ From the boat purchase to boat storage, a Uplus boat loan can cover all your boating expenses. Current APR: 3.79%	Select

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.

The screenshot displays the PEGA Sales Automation Campaign Dashboard. The interface includes a sidebar with navigation options like Dashboard, My Work, Pulse, Organizations, Accounts, Contacts, Leads, Opportunities, Forecast, Campaigns, Appointments, Affinities, Knowledge, Engagement Map, Reports, and Mobile Notifications. The main content area is titled 'Campaign Dashboard' and features a 'My Campaigns' table, a 'LATEST CAMPAIGN' section, and an 'ENGAGEMENT FOR LAST 5 CAMPAIGNS' section.

NAME	STATUS	START DATE	OBJECTIVES
Upsell Offer	Resolved-Completed	3/7/2018 4:07 PM	asdf
Cross Sell Offer	Resolved-Completed	2/16/2018 7:48 AM	Cross Sell thermostats offer to High CLV customers
New contacts offers	Resolved-Completed	2/14/2018 11:44 AM	New nest rebates for new contacts
High value customer offer	Resolved-Completed	2/14/2018 11:36 AM	High value customer offer
Fresh stock discount offers	Resolved-Completed	2/14/2018 9:07 AM	fresh stock discounts
Berlin Int. film festival offer	Resolved-Completed	2/14/2018 8:57 AM	grab the discount offers before it's too late.
Oktobberfest discount offers	Resolved-Completed	2/14/2018 8:13 AM	get the discount offers.
Mid season offers	Resolved-Completed	2/14/2018 5:10 AM	Get the offers you wished for.
New year discount offers	Resolved-Completed	2/14/2018 5:02 AM	grab the latest offers.
Christmas offers	Resolved-Completed	2/14/2018 4:13 AM	Grab the latest discount offers. Happy Christmas.

LATEST CAMPAIGN
Upsell Offer

RESULTS
Delivered: 13

Metric	Value	Rate
Opened	0	0.00%
Clicked	0	0.00%

ENGAGEMENT FOR LAST 5 CAMPAIGNS
Below are the engagement results for your last 5 campaigns, which include:
Upsell Offer | test | Cross Sell Offer | New contacts offers | High value customer offer

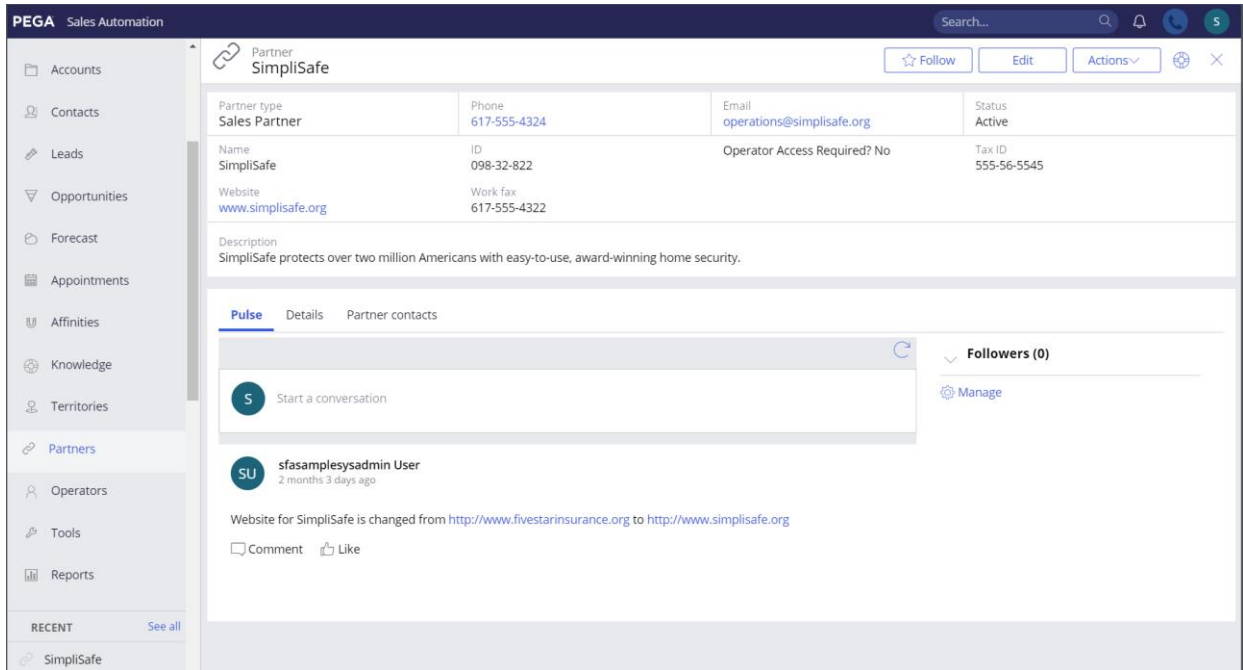
RESULTS
Total Delivered: 39

Metric	Value	Rate
Total Opened	4	10.26%
Total Clicked	3	7.69%

last updated 4/11/18 3:52 PM

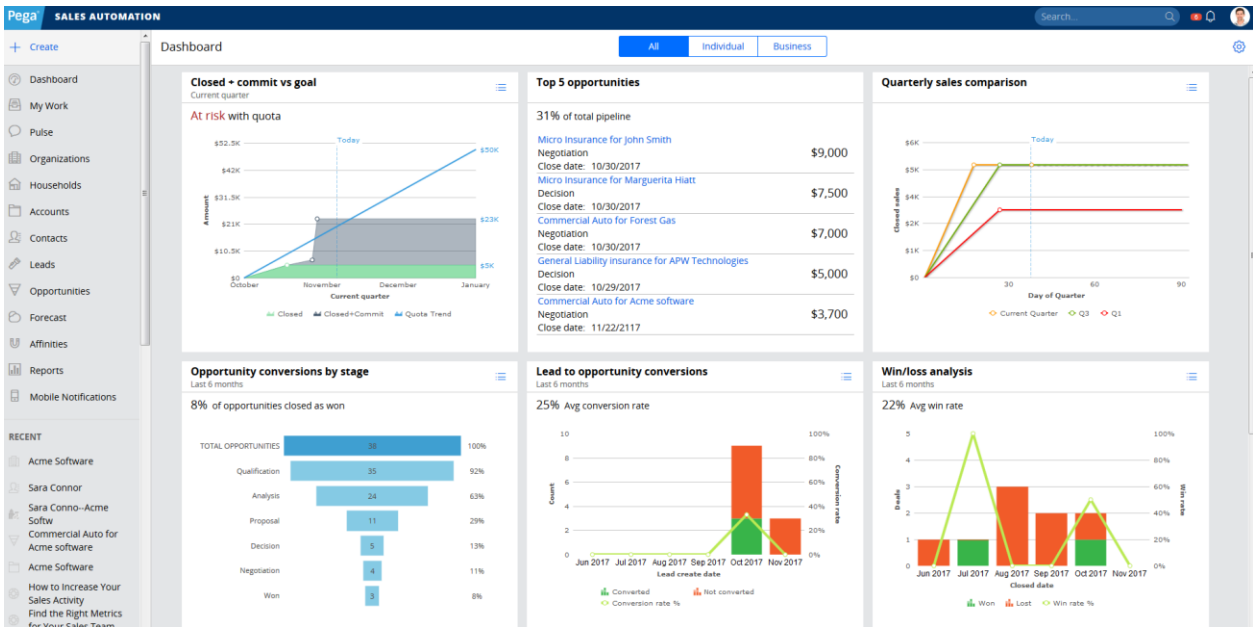
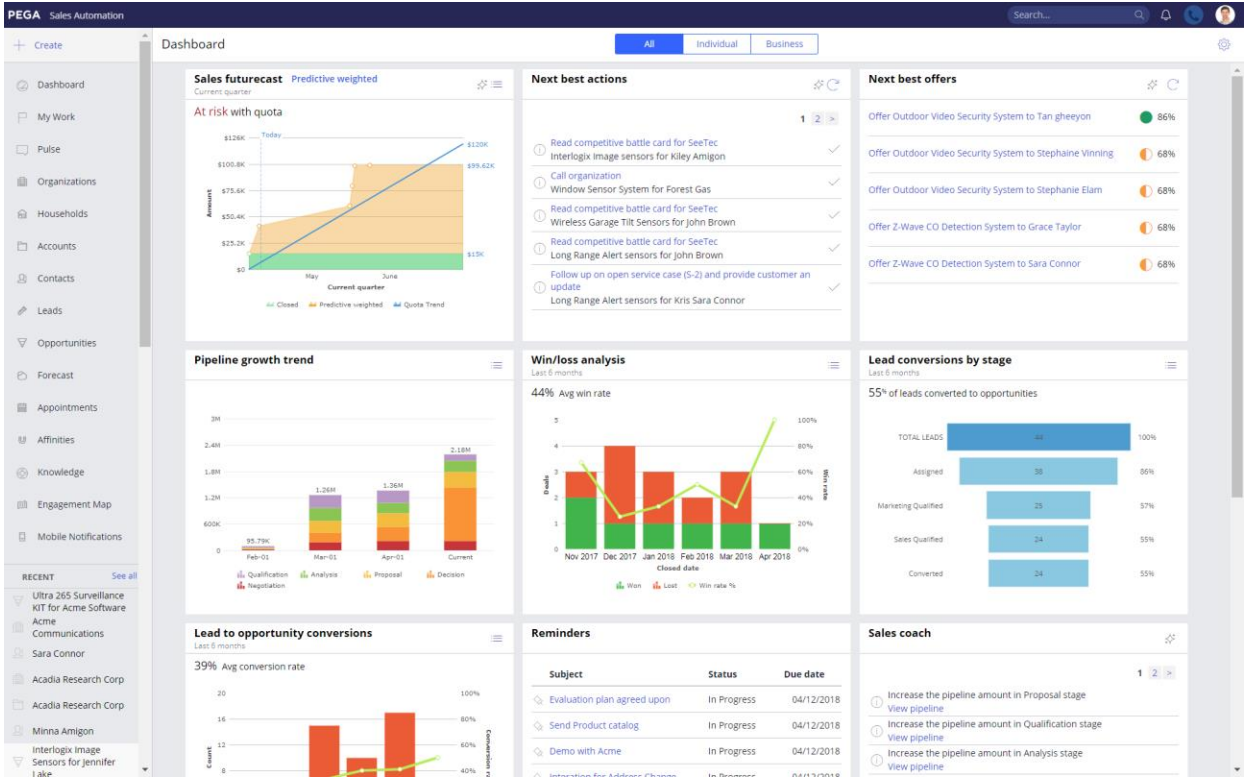
Partner agency management

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.



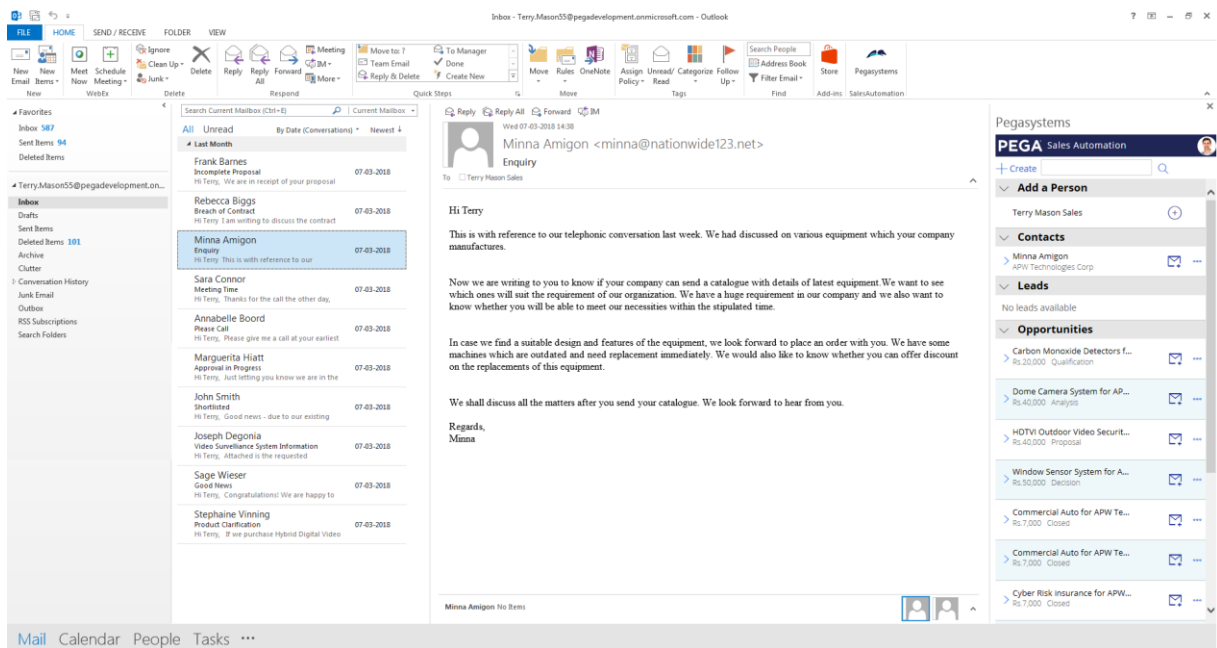
Dashboards and reports

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 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.

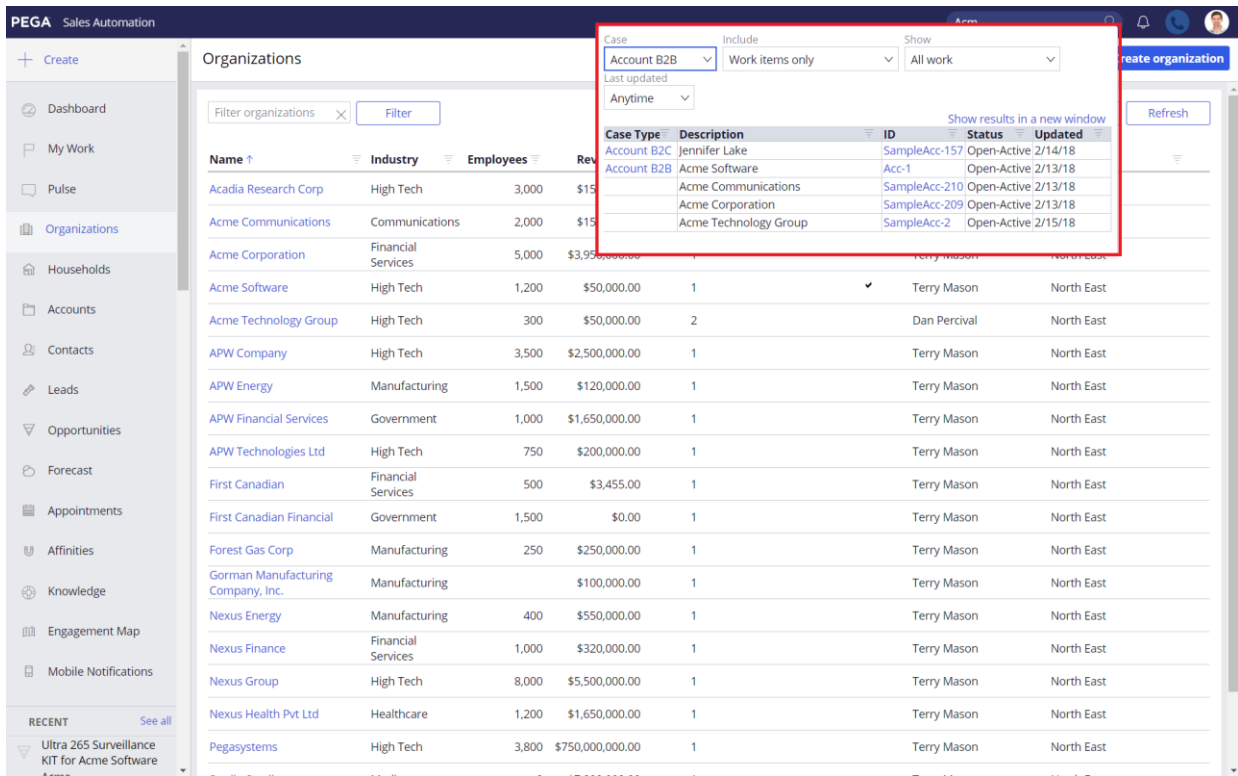
Pega Knowledge

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.

The screenshot displays a Pega CRM interface for an opportunity record. The main view shows details for 'Business Auto for Interaccess National', including amount (\$27,000.00), close date (12/18/2017), and probability (25%). A sidebar on the right, titled 'Knowledge', is highlighted with a red box and contains a search bar, 'Suggested articles' (e.g., 'Farmers insurance Battle Card'), 'Trending' (e.g., 'Great Salespeople Are Born, but Great Sales Forces Are Made'), and 'New' (e.g., 'Farmers Insurance Case Study') sections. Below the main view, an 'Opportunity insight' section shows progress bars for 'Move to next stage' (50% to Proposal, Ready), 'Win probability' (2% Likelihood, Watch), and 'Close date' (Early).

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 is 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.

The screenshot displays the Pega Pulse interface for a sales opportunity. At the top, the breadcrumb navigation shows 'Acme Software > Acme Software > Opportunity' for 'Ultra 265 Surveillance KIT for Acme Software'. A progress bar indicates the current stage is 'Decision', with previous stages 'Qualification', 'Analysis', and 'Proposal' completed. Below the progress bar, a table lists tasks for each stage:

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

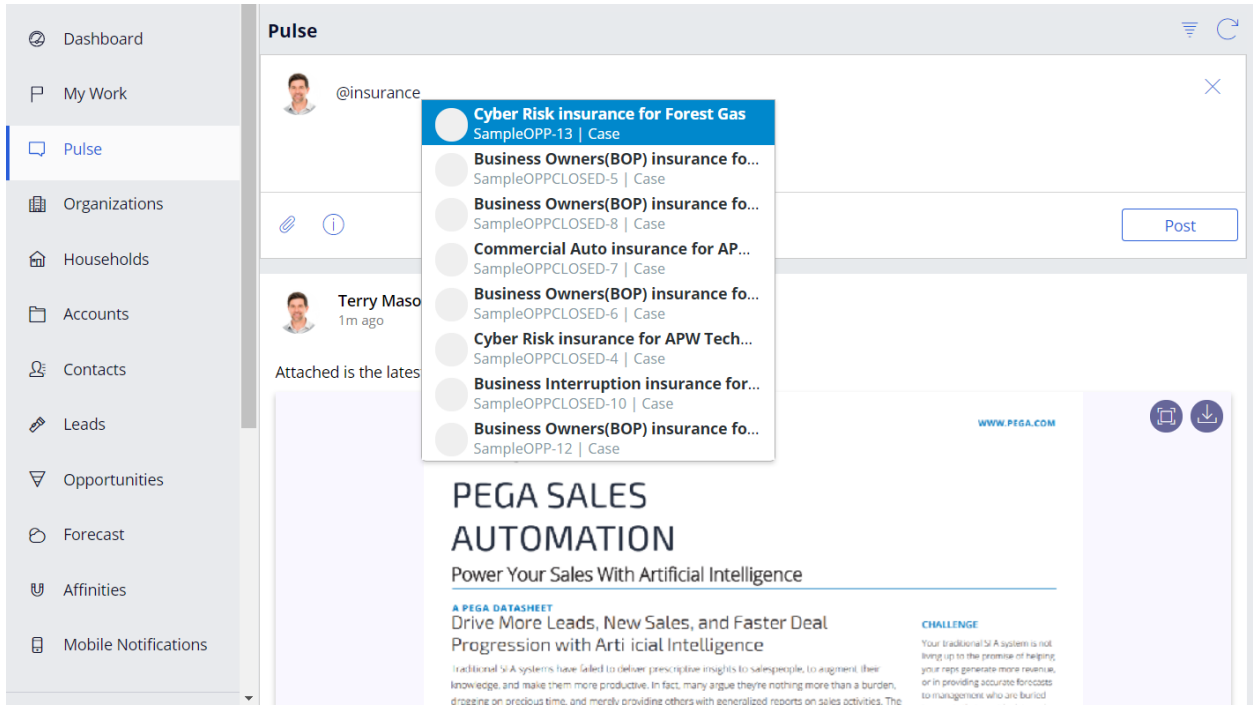
Below the table, the 'Pulse' feed is visible, showing a conversation starting with 'Start a conversation' and three posts by Terry Mason:

- Amount for Ultra 265 Surveillance KIT for Acme Software is changed from \$101020.00 to \$1000000
- OpportunityStage for Ultra 265 Surveillance KIT for Acme Software is changed from Proposal to Decision
- OpportunityStage for Ultra 265 Surveillance KIT for Acme Software is changed from Analysis to Proposal

On the right side, there are sections for 'Sales team (2)' and 'Followers (2)'. The sales team includes Lisa Moore (Sales Consultant) and Anna Parker (Operations). The followers include Sarah Kendall (Sales Manager) and Terry Mason (Sales Rep).

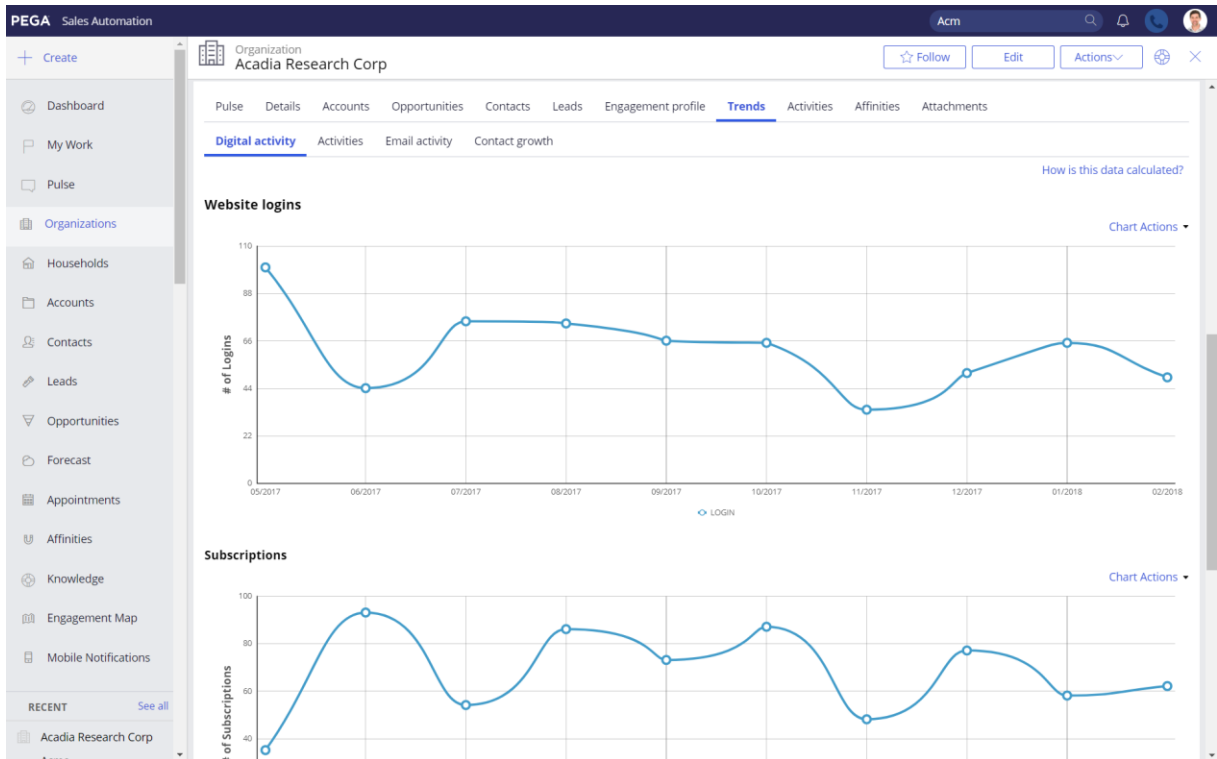
Reference objects in Pulse

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

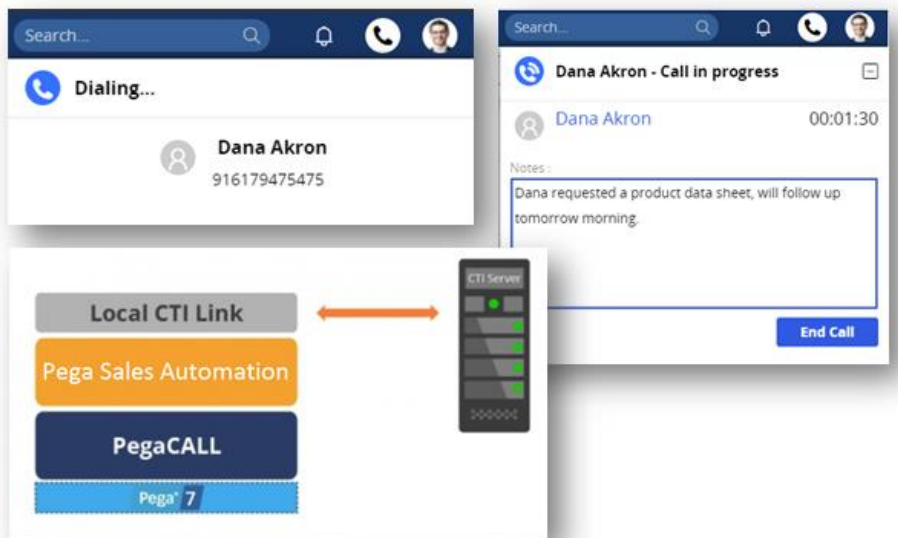
View by: Product Group | Selling mode: B2B

> 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

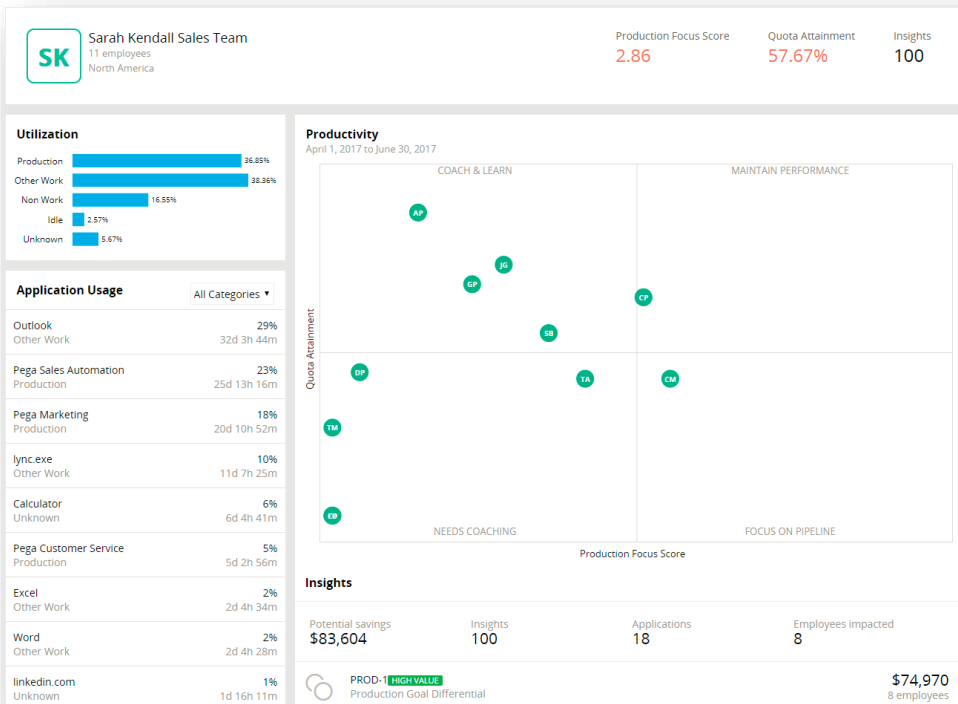
Pega Call

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.

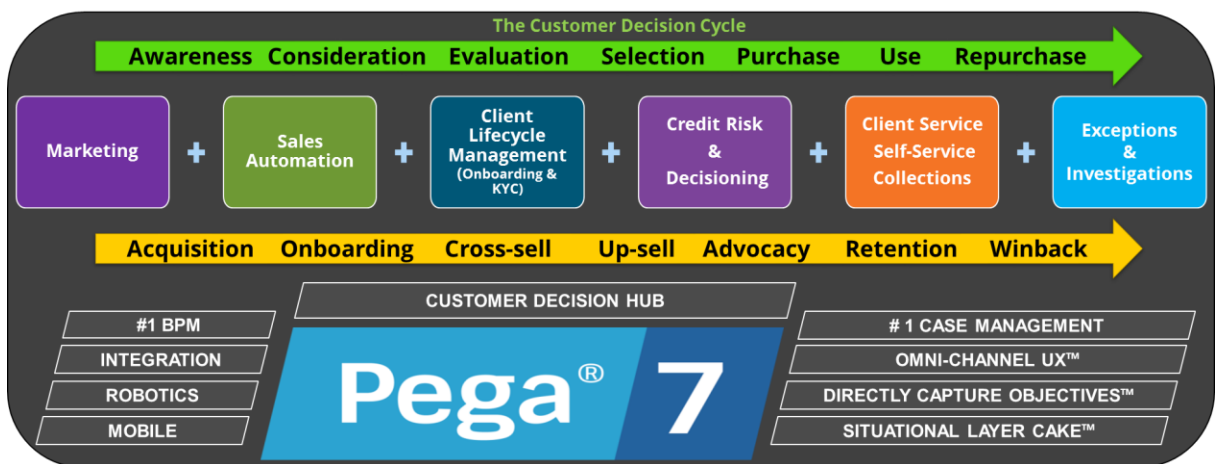
Co-Browse*

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.)

End-to-End Customer & Employee Engagement Platform for Retail, SMB, Corporate & Investment Bank

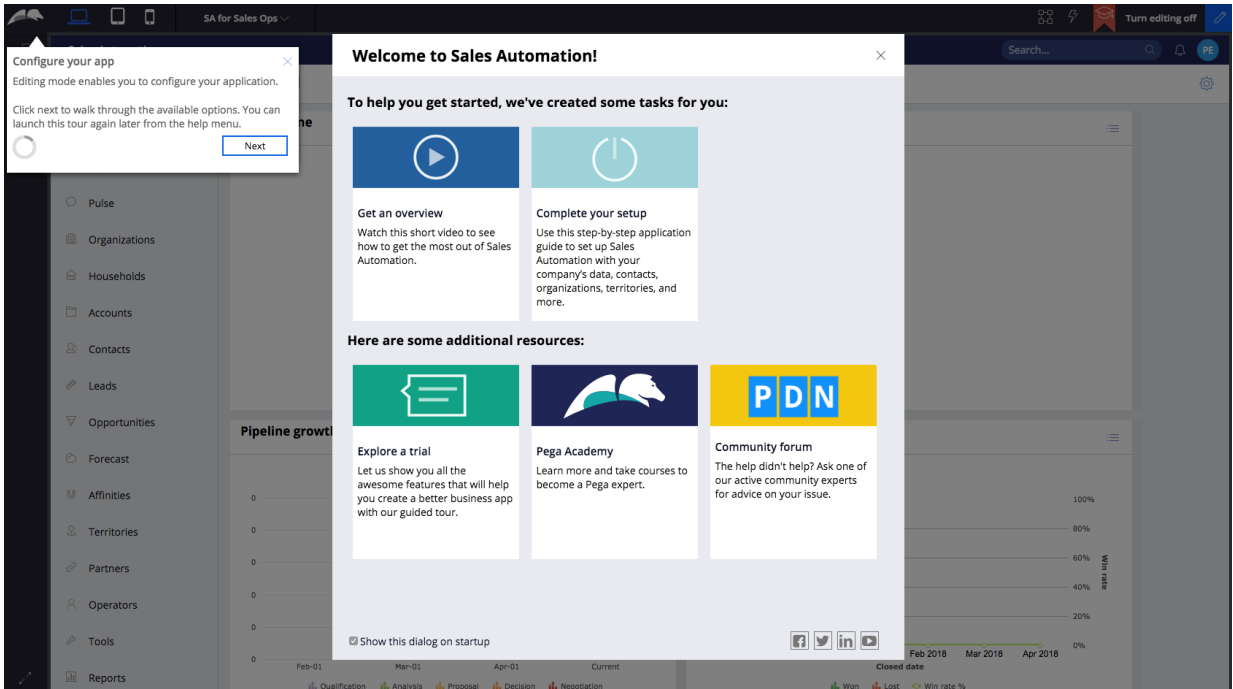


Multi-lingual support*

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.



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.

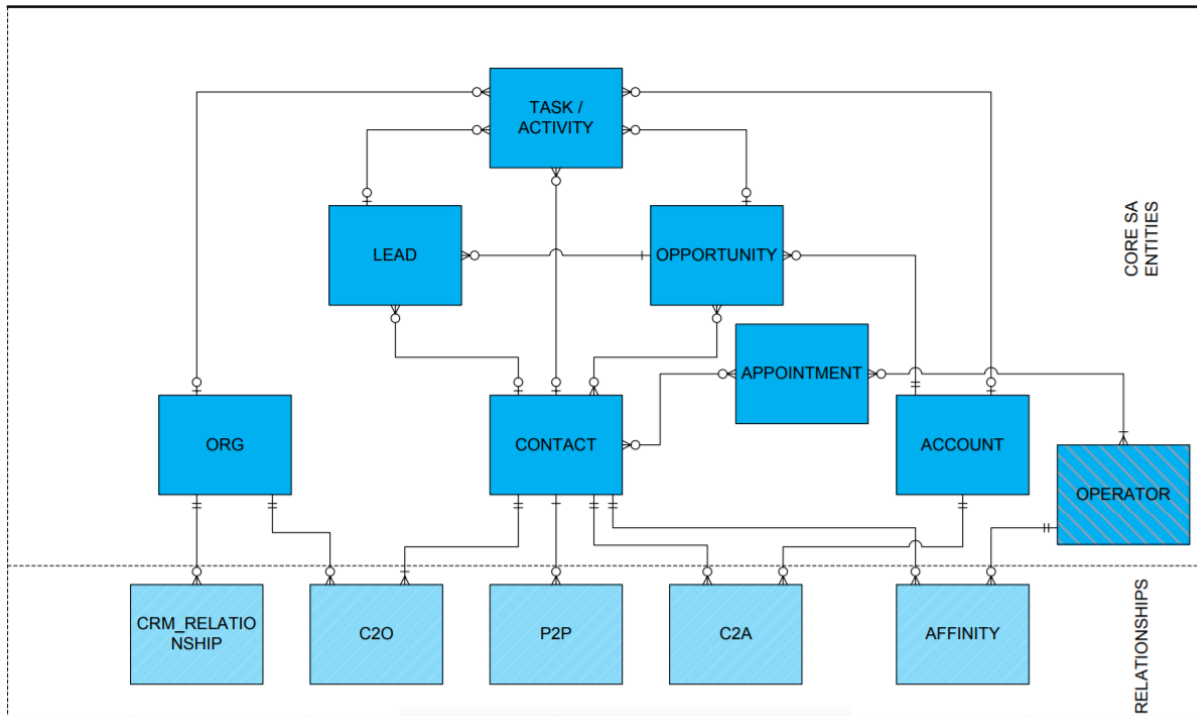
Cases	Description
Organization	An organization represents the levels of the customer business hierarchy. The organization can be a specific business, holding company, or corporation and has one or more organizations or accounts as a child entity.
Account	An account is an economic decision-making unit. 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



5 Roles, portals, and dashboards

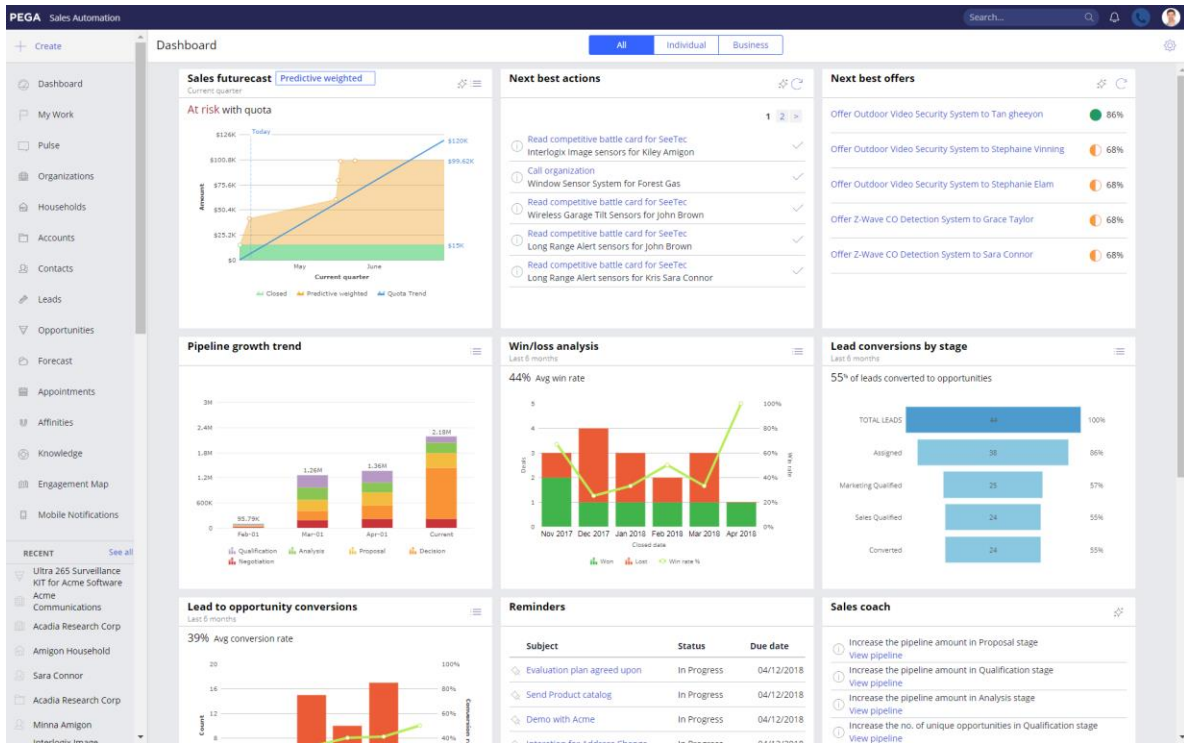
Pega Sales Automation for Financial Services roles

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

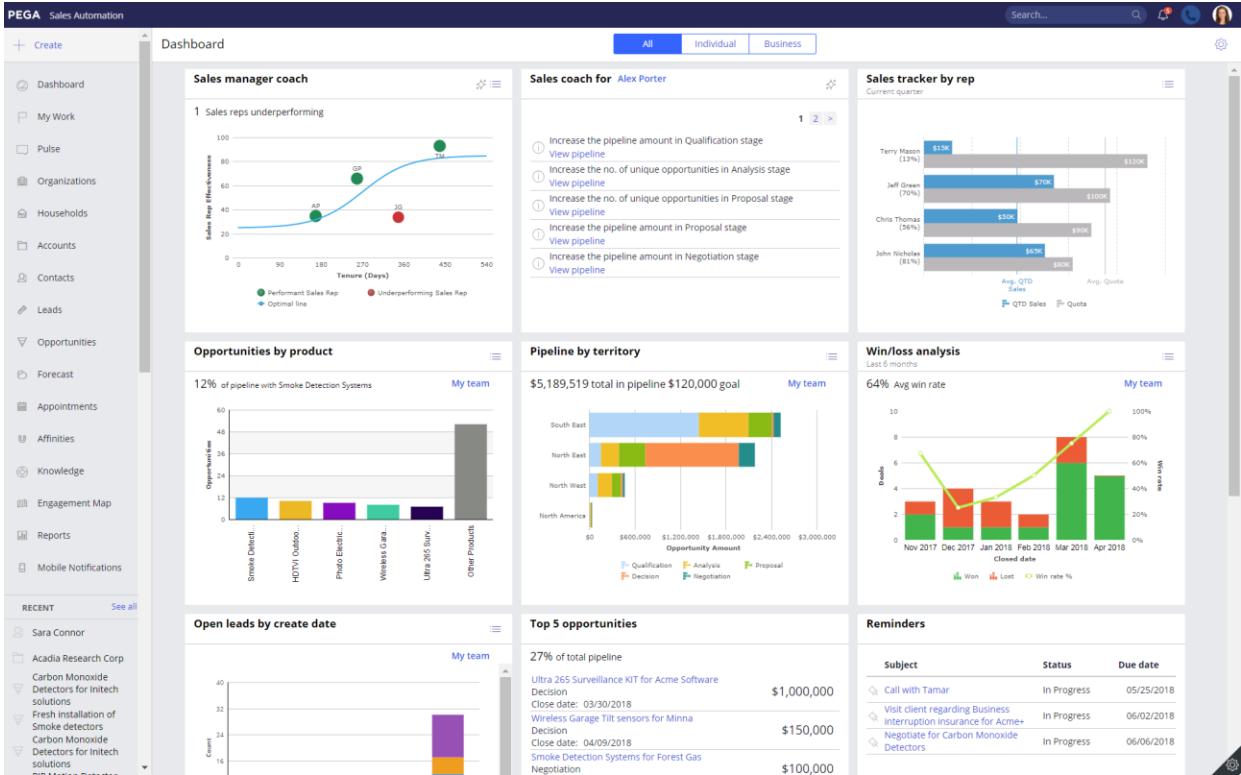
Sales Rep portal

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.



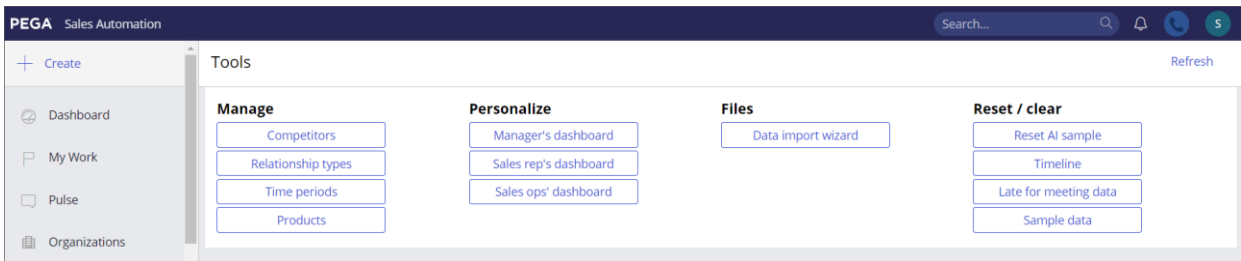
Sales Manager portal

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

The screenshot shows the PEGA Sales Automation dashboard editor. On the left is a navigation menu with options like Dashboard, My Work, Pulse, Organizations, Households, Accounts, Contacts, Leads, Opportunities, Forecast, Appointments, and Affinities. The main area is titled 'Dashboard' and contains three widget slots:

- Slot 1: Lead to opportunity conversion** (Last 6 months). Shows a 28% Avg conversion rate for 'My team'. A combined bar and line chart displays 'Count' (left axis, 0-30) and 'Conversion rate %' (right axis, 0-100%) from Nov-2017 to Apr-2018. Legend: Converted (green bar), Not converted (red bar), Conversion rate % (yellow line).
- Slot 2: Top 5 opportunities**. Shows 27% of total pipeline. Lists:
 - Ultra 265 Surveillance KIT for Acme Software: Decision, Close date: 03/31/2018, \$1,000,000
 - Wireless Garage Tilt sensors for Minna: Decision, Close date: 04/10/2018, \$150,000
 - Smoke Detection Systems for Forest Gas Negotiation: Decision, Close date: 08/13/2018, \$100,000
 - Long Range Alert sensors for John Smith: Negotiation, Close date: 02/17/2018, \$90,000
 - Long Range Alert sensors for Marguerita Hiatt: Decision, Close date: 08/14/2018, \$75,000
- Slot 3: Win/loss analysis** (Last 6 months). Shows a 64% Avg win rate for 'My team'. A combined bar and line chart displays 'Deals' (left axis, 0-10) and 'Win rate %' (right axis, 0-100%) from Nov-2017 to Apr-2018. Legend: Won (green bar), Lost (red bar), Win rate % (yellow line).

At the bottom right, a 'Publish' menu is open, showing options: 'Publish to access group' and 'Publish to default'. The 'Publish' button is highlighted in blue.