

# Pega Customer Service Foundation

## Course Description:

The Pega Customer Service Foundation course provides an in-depth understanding of Pega's capabilities for optimizing customer service interactions. Participants will explore key features such as self-service interactions, AI-driven automation, insights for monitoring customer interactions, and knowledge management. The course covers hands-on exercises for conducting interactions, leveraging Pega GenAI Blueprint, and managing knowledge articles to enhance customer experience.

## Audience Profile:

This course is designed for customer service representatives, business analysts, system architects, and anyone involved in customer service operations using Pega. It is ideal for professionals looking to improve efficiency and enhance customer experiences through Pega's intelligent automation and AI-driven capabilities.

## Prerequisite:

Basic understanding of customer service operations and familiarity with CRM platforms is recommended but not required.

## Course Objectives:

By the end of this course, participants will be able to:

- Describe typical customer service and self-service interactions in Pega.
- Conduct customer interactions efficiently using Pega tools.
- Utilize Pega GenAI Blueprint to streamline application development.
- Create and manage insights for better contact center monitoring.
- Leverage Pega Knowledge to support customer service operations.

## Table of Contents (TOC):

### Module 1 - Pega Customer Service Overview

1. Describe a typical customer service interaction
2. Describe a typical self-service interaction
3. Conduct an interaction

### Module 2 - Conducting an Interaction

1. Start a phone interaction
2. Complete the address change service case
3. Record the customer inquiry

### **Module 3 - Accelerating Application Building with Pega GenAI Blueprint**

1. Use Blueprint to incorporate best practices and Pega expertise
2. Generate and modify created Blueprints
3. Import a Blueprint into Pega Platform to build an application

### **Module 4 - Using Pega GenAI Blueprint to Create a Customer Service Application**

1. Scenario
2. Challenge Walkthrough
3. Detailed Tasks:
  - Create a Blueprint
  - Create a new application

### **Module 5 - Pega Voice AI Introduction**

1. Script adherence reminders and visualization for HIPAA and fiduciary compliance
2. Hands-free form autofill using entities detected from the voice stream
3. Case suggestions for resolving customer requests
4. Knowledge suggestions for quick access to relevant content

### **Module 6 - Monitoring Your Contact Center with Insights**

1. Create an Insight
2. Add an Insight to the manager dashboard

### **Module 7 - Leveraging Insights**

1. Scenario
2. Challenge Walkthrough
3. Detailed Tasks:
  - Create a new Insight
  - Add an Insight to your dashboard

### **Module 8 - Pega Knowledge Overview**

1. Identify the benefits of Pega Knowledge and help content
2. Navigate the Pega Knowledge Portal
3. Identify the three stages of the content management lifecycle

### **Module 9 - Linking Knowledge Articles to Service Cases**

1. Create a content draft
2. Approve the draft
3. Publish the approved content
4. Configure the suggested knowledge article