



# Where Salesforce falls short


5 ways to turn your top Salesforce challenges into wins



A PEGA  
EBOOK

Build  
for  
Change®



An overhead view of a business meeting around a long white conference table. Ten people are seated around the table, engaged in discussion. The table is cluttered with papers, laptops, and tablets. The floor is made of large, light-colored stone tiles. The background is a solid teal color.

# Bridging the gap between Dream(force) and reality

If you're wanting more from your Salesforce purchase, you're not alone. An independent research firm uncovered that 1 in 4 Salesforce clients cited frustration in missing what they viewed as "core capabilities." And to make matters worse, more than half said they were suffering from Salesforce's high cost of ownership over time.

At Pega, we know the challenges you can face when you try to scale Salesforce to the demands of your business – because we've helped countless clients overcome them. We get work done, automating processes from end-to-end. We empower your business to make real-time decisions, powered by *real AI* that works consistently across all channels. We let clients control the power of the cloud, while running in an architecture that works for them, not just their vendor.

**Here are the top five ways that Salesforce can fall short – and five ways you can improve your Salesforce environment with the power of Pega.**



# 1 The case management chasm

## Solution

Step up to Pega's best-in-class case management.

Salesforce users quickly find that they run out of runway when attempting to use the application's native facilities for case management. Automating complex processes? A challenge. Connecting across legacy environments? Pretty tough. Scaling across a multi-line, multi-region enterprise? Practically impossible. Not being able to automate and streamline the complexity in your business is costing you customers – and money.

That's because Salesforce isn't a real case management platform. Or a real BPM platform. Or a real robotic automation platform. Only Pega delivers all three.

We've made it easier than ever to embed the industry's leading case management and automation platform into your current Salesforce environment with the Pega® Extender for Salesforce.com.



### Start now:

You can put the power of industry-leading automation to work for your business in less time than you think. Salesforce users can be up and running with Pega's best-of-breed case management capabilities in less than 90 days.

Ask about Pega's Customer Service Case Management Quick Win Package.

## 2 AI dreams that don't come true

### Solution

Infuse AI-powered real-time insights into agent-assisted interactions.

Your agents and sellers need more than data at their fingertips – they need real-time insight. Salesforce has built market hype around its AI, Einstein, but evidence of any real live deployment, much less at scale, remains to be seen. Your business can't wait years until Einstein is really ready to get going with AI.

You need results today.

Only Pega delivers proven AI. Pega's AI has already touched hundreds of millions of customers – and delivered real impact. But don't take our word for it. Check out our scores of case studies of clients who have used our real AI to generate hundreds of millions of dollars in revenue, all while making their customers happier.

Pega's proven AI capabilities can sense your customers' intent and sentiment – and guide every agent with the next best action to take, in the very moment of the interaction. Our software learns automatically over time, and self-calibrates for any given situation.

This isn't a cartoon. It's real AI proven at scale at leading global brands. And you can leverage the Pega® Customer Decision Hub to inject real intelligence into your Salesforce systems – today.

**Start now:**

With Pega, your agents, sellers, and marketers can be delivering real-time cross-sell and retention strategies – powered by real AI – in less than 90 days.

Ask about Pega's Real-time Retention and Real-time Revenue Quick Win Packages.





# 3 The Lightning-lag

## Solution

Streamline your agent and user experiences without expensive coding.

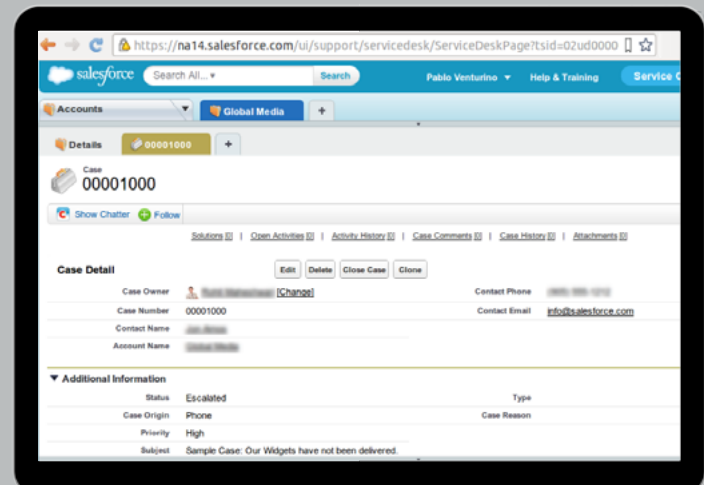
Enterprises can't take any product "off the shelf." As a result, Salesforce users start down the daunting road of heavy customization via Salesforce Lightning, only to find many of their core capabilities are *not yet available* in the Lightning environment. The only option is APEX – which leaves change slow, cumbersome, and buried in code. This "Lightning-lag" leaves businesses at a standstill, with few options now or in the future.

There is a new approach. You can provide all of your agents with our next-generation Pega® Customer Service - Enterprise Desktop package, all while using your existing Salesforce "plumbing" under the hood. You can quickly connect Pega to your databases and existing systems, while giving your tired and inflexible desktop a much-needed facelift. Agents immediately benefit from Pega's streamlined user experience, reducing training costs and accelerating average handle time.

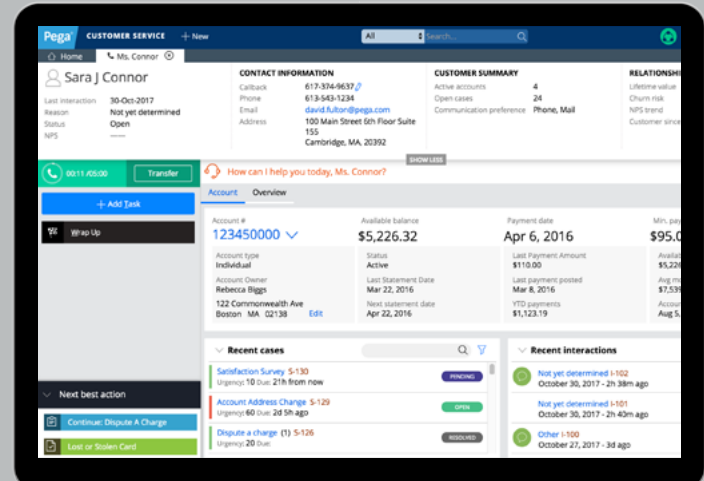
A Forrester Research study found that companies who moved to Pega's next generation customer service environment reported substantial benefits, including:

- 15% improvement in conversion rate
- 11% improvement in average order value
- 24% reduction in customer churn rate
- 10-day reduction in training time

Before:



After:



Start now:

These gains are fast. With Pega, you can get up and running with your new customer service desktop in as little as 90 days.

Ask about the Customer Service Desktop Mashup Quick Win Package.



## 4 The custom app-pocolypse

### Solution

Consolidate your custom applications with Pega Express.

You're not a small business, or a Silicon Valley start-up. Your business has complex needs. You require the ability to innovate. You want to quickly create custom applications that precisely fit the needs of your growing enterprise. If you're like most large enterprises stuck with Salesforce, this is where the honeymoon ends.

As a result, many Salesforce implementations end up surrounded by workarounds – custom apps that fill gaps in Salesforce but create silos in themselves. Use the right tool for the job. The Pega® Platform puts industry-leading intelligence and automation in a code-free environment. Business can build the apps they need. IT can ensure governance and connectivity to core systems. Everyone wins.



### Start now:

Sign up for your [Pega Express free trial](#) today to see how easy it is to build your own custom applications – in just minutes.

Salesforce accounts can quickly retire the custom applications that are holding your business back. With Pega, you can build applications faster, and ensure they can scale to the needs of your business.



## 5 Those pricy occasional users

### Solution

Get cost-effective access to your Salesforce data with Pega's more intuitive user interface.

Another place Salesforce accounts commonly feel pain: In their wallets. Businesses are commonly forced to acquire a full user license for every user – even if they are only using the application occasionally for simple data lookup. And at renewal time, that price keeps going up. Why are you still overpaying for a full user seat?

There's another option. These occasional users just need access to the information that is in Salesforce, not the full environment. By integrating at the data layer, Pega's clean, intuitive user interface can empower these occasional users to access, and enter, the data that they need – with a better experience, at a fraction of the cost.



### Start now:

Stop overpaying for light and occasional data access. Pega can provide you an easier to use, more cost effective option to provide access to your customer data.

Contact a Pega representative today to learn more about this important cost-saving option.



# Stop dreaming. Start doing.

Don't subject your enterprise to the limitations of software designed for small businesses. Your road to greater revenue, retention, productivity and profitability starts now.

**Get real automation. Get real AI. Get real results.  
Discover Pega, the real CRM alternative.**





## ABOUT PEGASYSTEMS

We are Pegasystems, the leader in software for customer engagement and operational excellence. Our adaptive, cloud-architected software – built on the unified Pega® Platform – empowers people to rapidly deploy, and easily extend and change applications to meet strategic business needs. Over our 30-year history, we’ve delivered award-winning capabilities in CRM and BPM, powered by advanced artificial intelligence and robotic automation, to help the world’s leading brands achieve breakthrough results.

For more information, please visit us at [WWW.PEGA.COM](http://WWW.PEGA.COM)