Pega GenAl *** Blueprint**™

APPLICATION OVERVIEW DOCUMENT

Managing the sales process using Pega GenAl Blueprints

Congratulations on completing your application definition! This document presents a summary overview of your application as defined in the Pega platform. It encapsulates the key elements of your application's design, highlighting its core functionalities and overall structure.

Please note that this is a high-level view and does not include granular details like data models or sample data. It's an ideal resource for a quick reference, facilitating discussions among team members and stakeholders, and for guiding strategic decisions in your application development process.

Blueprint ID: BP-498120

Application Context

Organization name Location Industry Language
Pegasystems United States Other English

Application purpose

Managing the sales process using Pega GenAl Blueprints

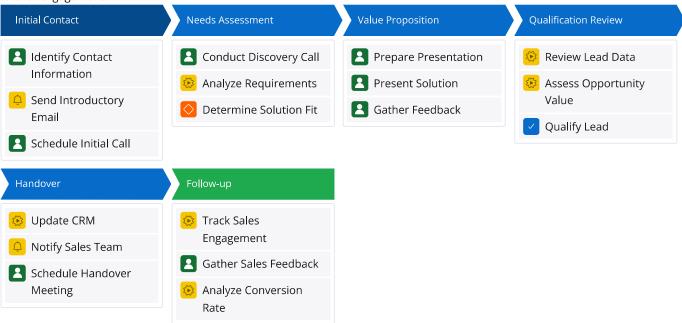
Functional description

This application helps account managers and business development experts engage with clients to envision a solution using Pega GenAl Blueprints. The goal is to manage the entire sales process using MEDDPICC methodology to ensure client needs are met and the deal closes in the the most optimal timeframe. The process includes soliciting feedback from clients on their solution needs, gathering supporting documentation, and then putting that information into Pega GenAl blueprints to create a workflow that can be suitable for their needs. From there, the application will provide suggestions for follow up meetings and activities such as iterating on the Blueprints to better meet the client requirements, training for clients on how to use Pega GenAl Blueprints, and the opportunity to run a pilot using Pega Testdrive. Once complete, the application should guide the client on the process to procure the solution.

Workflows (Case Types)

Lead Qualification

This case type manages the process of qualifying potential sales leads. It includes gathering initial information, assessing the lead's fit with the company's offerings, and determining the potential value of the opportunity. The outcome is a qualified lead ready for further engagement.

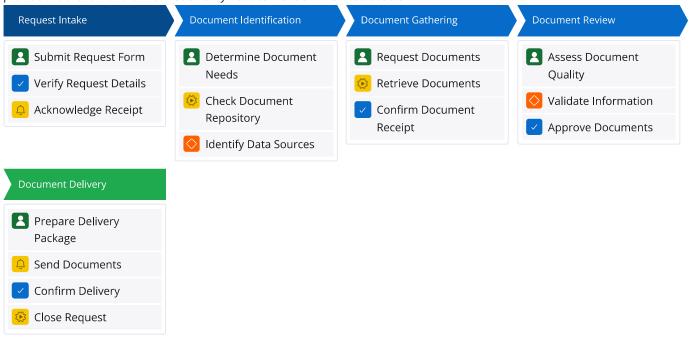


Field Name	Description	Туре	Primar
Company Name	The name of the company the lead represents.	Text	~
Lead Qualification	A score indicating the lead's potential based on predefined criteria.	Int	✓
Lead Source	The origin of the lead, such as website, referral, or advertisement.	Text	~
Budget	The estimated budget the lead has allocated for the solution.	Cu	
Client	Reference to the client associated with the lead.	Da	
Contact Email	The email address of the primary contact.	Em	
Contact Name	The full name of the primary contact at the lead's company.	Text	
Contact Phone	The phone number of the primary contact.	Ph	
Job Title	The job title of the primary contact.	Text	
Sales Opportunity	Reference to the sales opportunity associated with the lead.	Da	
Case ID	Unique identifier for this individual case instance	Text	~
Case Label	Label for this individual case instance	Text	~
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	✓
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	

Field Name	Description	Туре	Primary
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Documentation Request

This case type manages requests for supporting documentation related to the proposed solution. It includes identifying the required documents, gathering the documents from various sources, and delivering the documents to the client. The goal is to provide the client with the information they need to make an informed decision.

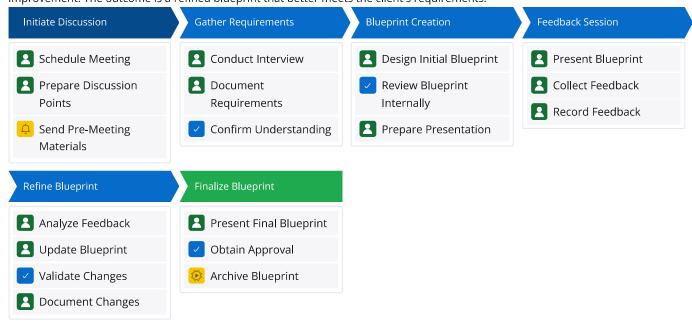


Field Name	Description	Туре	Primary
Client	Reference to the client requesting the documentation.	Da	✓
Completion Date	The date when the documentation request was fulfilled and delivered to the client.	Date	~
Document Type	The type of document being requested (e.g., specification, user manual, etc.).	Text	✓
Request Date	The date when the documentation request was submitted.	Date	~
Sales Opportunity	Reference to the sales opportunity related to the documentation request.	Da	~
Client Urgency	The level of urgency the client has for receiving the requested documentation.	Text	
Document Title	The title or name of the document being requested.	Text	
Internal Notes	Any internal notes or comments regarding the documentation request.	Text	
Requested By	The name of the person or department requesting the documentation.	Text	
Supporting Docum	Reference to the supporting document object.	Da	
Case ID	Unique identifier for this individual case instance	Text	~
Case Label	Label for this individual case instance	Text	✓
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	✓
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	

Field Name	Description	Туре	Primary
Work Status	Work status of the case	Text	✓

Customer Requirements/Vision Discussion

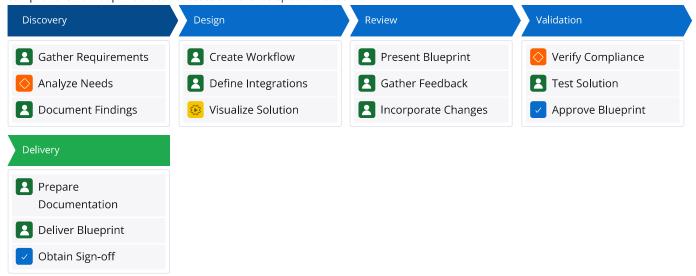
This case type focuses on gathering feedback from clients on their solution needs and the effectiveness of the proposed blueprint. It includes soliciting feedback through surveys, interviews, or focus groups, and analyzing the feedback to identify areas for improvement. The outcome is a refined blueprint that better meets the client's requirements.



Field Name	Description	Туре	Primary
Blueprint ID	Unique identifier for the Pega GenAl Blueprint being discussed.	Text	~
Feedback Source	The method used to gather feedback from the client (e.g., survey, interview, focus group).	Text	✓
Areas for Improve	Specific areas identified for improvement in the blueprint based on client feedback.	Text	
Blueprint	Reference to the Pega GenAl Blueprint being reviewed.	Da	
Blueprint Alignment	How well the blueprint aligns with the client's stated requirements.	Int	
Client	Reference to the client providing the feedback.	Da	
Client Understandi	Assessment of the client's understanding of the proposed solution.	Int	
Feedback Date	The date the feedback was collected from the client.	Date	
Overall Satisfaction	A rating of the client's overall satisfaction with the proposed blueprint.	Int	
Supporting Docum	List of documents provided by the client to support their requirements.	Da	
Case ID	Unique identifier for this individual case instance	Text	✓
Case Label	Label for this individual case instance	Text	✓
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	✓
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	✓

Solution Blueprint

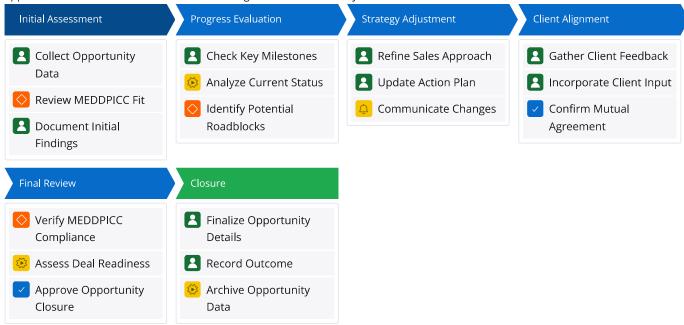
This case type focuses on creating a tailored solution blueprint for the client using Pega GenAl Blueprints. It involves gathering detailed client requirements, designing a workflow, and generating a visual representation of the proposed solution. The result is a comprehensive blueprint that addresses the client's specific needs.



Field Name	Description	Туре	Primary
Blueprint ID	Unique identifier for the solution blueprint.	Text	✓
Client	Reference to the client associated with this solution blueprint.	Da	✓
Client Requirements	Detailed description of the client's needs and expectations for the solution.	Text	✓
Blueprint	Reference to the Pega GenAl Blueprint created for the client.	Da	
MEDDPICC Analysis	Reference to the MEDDPICC criteria for this sales opportunity.	Da	
Pilot Completion D	The date when the pilot using Pega Testdrive was completed.	Date	
Procurement Status	The current status of the procurement process for the solution.	Text	
Proposed Solution	A visual representation of the proposed solution workflow using Pega GenAl Blueprints.	URL	
Sales Opportunity	Reference to the sales opportunity associated with this blueprint.	Da	
Supporting Docum	List of documents provided by the client or created internally.	Da	
Case ID	Unique identifier for this individual case instance	Text	✓
Case Label	Label for this individual case instance	Text	✓
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Opportunity Review

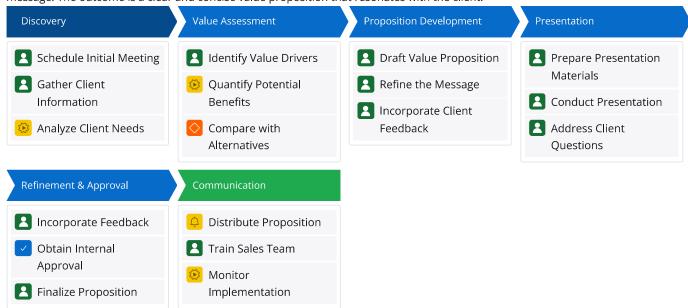
This case type manages the periodic review of sales opportunities to ensure alignment with client needs and MEDDPICC criteria. It includes assessing progress, identifying potential roadblocks, and adjusting the sales strategy as needed. The outcome is a refined approach that maximizes the chances of closing the deal successfully.



Field Name	Description	Туре	Primary
MEDDPICC Assess	Overall assessment of the opportunity based on MEDDPICC criteria.	Text	~
MEDDPICC Refere	Reference to the MEDDPICC data object.	Da	~
Potential Roadbloc	Identified potential roadblocks or challenges for the opportunity.	Text	~
Review Date	The date on which the opportunity review is conducted.	Date	~
Sales Opportunity	Reference to the Sales Opportunity data object.	Da	~
Sales Stage	Current stage of the sales opportunity in the sales pipeline.	Text	~
Client Feedback	Feedback received from the client during the review process.	Text	
Key Strengths	Identified strengths of the opportunity based on the review.	Text	
Next Review Date	The date scheduled for the next opportunity review.	Date	
Recommended Act	Recommended actions to address the identified roadblocks and improve the opportunity.	Text	
Case ID	Unique identifier for this individual case instance	Text	~
Case Label	Label for this individual case instance	Text	~
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Value Proposition

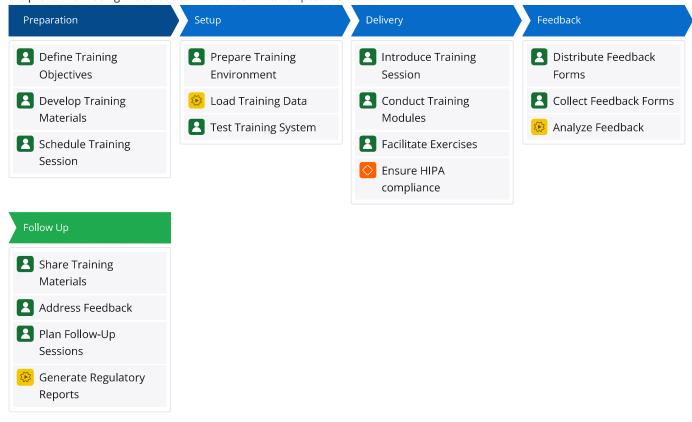
This case type focuses on developing a compelling value proposition for the client, highlighting the benefits of the proposed solution. It includes identifying the client's key pain points, quantifying the potential value of the solution, and crafting a persuasive message. The outcome is a clear and concise value proposition that resonates with the client.



Field Name	Description	Туре	Primary
Client Pain Points	Detailed description of the client's key challenges and areas of dissatisfaction that the proposed sol	Text	~
Quantified Value	Measurable benefits of the proposed solution, including cost savings, revenue increases, and efficie	Cu	~
Value Proposition	A concise and persuasive statement summarizing the value of the proposed solution for the client.	Text	~
Blueprint	Reference to the Pega GenAl Blueprint associated with the value proposition.	Da	
Champion	The individual within the client organization who is a strong advocate for the proposed solution.	Text	
Client	Reference to the client for whom the value proposition is being developed.	Da	
Economic Buyer	The individual within the client organization who has the authority to approve the investment in the	Text	
Metrics	Key performance indicators (KPIs) that will be used to measure the success of the proposed solution.	Text	
Solution Benefits	Comprehensive list of the advantages and positive outcomes that the client will experience by adop	Text	
Supporting Docum	List of documents provided by the client or created internally to support the value proposition.	Da	
Case ID	Unique identifier for this individual case instance	Text	✓
Case Label	Label for this individual case instance	Text	✓
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Training Session

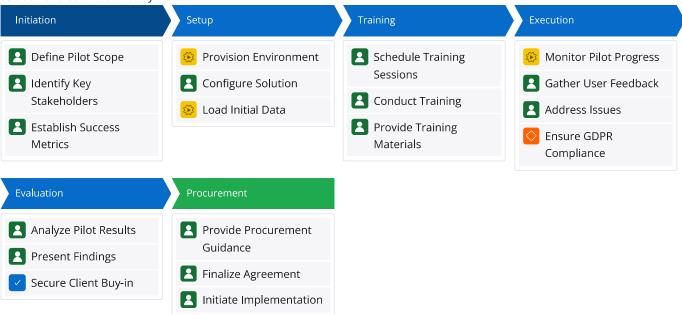
This case type manages the scheduling and delivery of training sessions for clients on how to use Pega GenAl Blueprints. It includes preparing training materials, conducting the training session, and gathering feedback from participants. The goal is to ensure clients are proficient in using the solution and can realize its full potential.



Field Name	Description	Туре	Primary
Case ID	Unique identifier for this individual case instance	Text	✓
Case Label	Label for this individual case instance	Text	✓
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Pilot Program

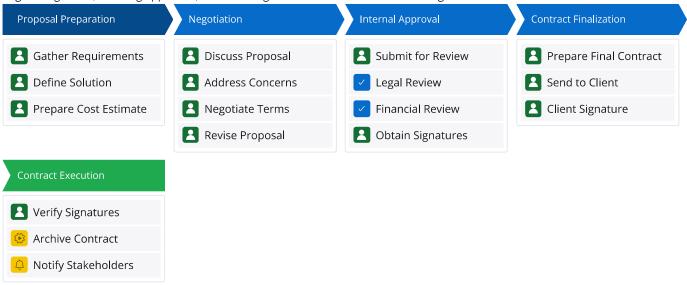
This case type manages the execution of a pilot program using Pega Testdrive. It includes setting up the pilot environment, providing training to the client, monitoring the pilot's progress, and gathering feedback. The goal is to demonstrate the value of the solution and secure client buy-in.



Field Name	Description	Туре	Primary
Blueprint	The Pega GenAl Blueprint used for the pilot program.	Da	~
Client	The client organization participating in the pilot program.	Da	~
Client Contact	The primary contact person at the client organization for the pilot program.	Text	~
Pilot End Date	The date on which the pilot program is scheduled to conclude.	Date	~
Pilot Start Date	The date on which the pilot program is scheduled to begin.	Date	~
Pilot Status	The current status of the pilot program (e.g., Planning, In Progress, Completed, Cancelled).	Text	~
Feedback Summary	A summary of the feedback received from the client during and after the pilot program.	Text	
Pilot Objectives	A clear and measurable list of objectives for the pilot program.	Text	
Pilot Program Bud	The allocated budget for the pilot program.	Cu	
Success Criteria	The specific criteria that will be used to determine the success of the pilot program.	Text	
Case ID	Unique identifier for this individual case instance	Text	~
Case Label	Label for this individual case instance	Text	~
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	✓
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Procurement Process

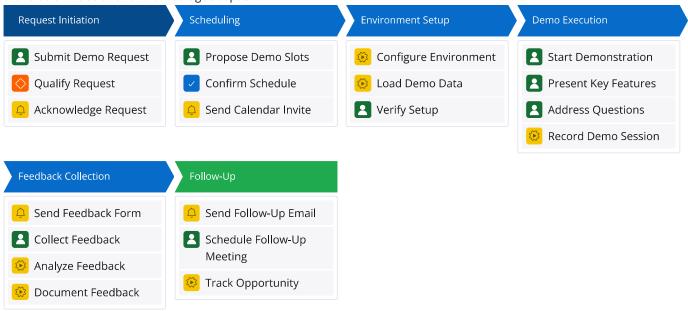
This case type guides the client through the procurement process for the proposed solution. It includes preparing a proposal, negotiating terms, securing approvals, and finalizing the contract. The outcome is a signed contract and a committed client.



Field Name	Description	Туре	Primary
Approval Status	The current status of internal approvals required for the procurement process.	Text	✓
Client Contact	Reference to the primary client contact involved in the procurement process.	Da	✓
Contract Value	The total monetary value of the contract.	Cu	✓
Proposal Document	The finalized proposal document submitted to the client for review and approval.	URL	✓
Sales Opportunity	Reference to the sales opportunity associated with this procurement process.	Da	✓
Blueprint	Reference to the Pega GenAl Blueprint used in the proposed solution.	Da	
Contract End Date	The date on which the contract with the client officially ends.	Date	
Contract Start Date	The date on which the contract with the client officially begins.	Date	
Legal Review Status	The status of the legal review for the contract.	Text	
Negotiation Terms	Summary of key terms negotiated with the client, including pricing, payment schedule, and service I	Text	
Case ID	Unique identifier for this individual case instance	Text	~
Case Label	Label for this individual case instance	Text	~
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	✓

Demo Request

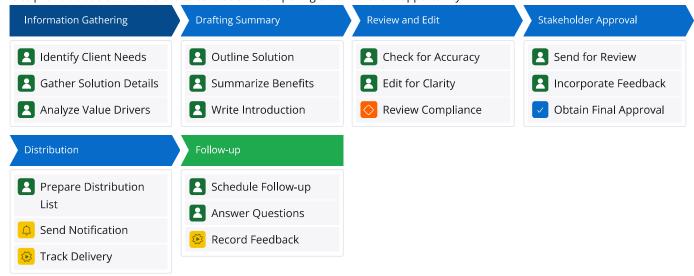
This case type manages requests for product demonstrations, allowing potential clients to experience the solution firsthand. It includes scheduling the demo, preparing the environment, conducting the demo, and gathering feedback. The goal is to showcase the value of the solution and encourage adoption.



Field Name	Description	Туре	Primary
Client Contact	The primary contact person at the client's organization who will be attending the demo.	Text	~
Demo Date	The date and time the product demonstration is scheduled to occur.	Da	~
Blueprint	Represents a Pega GenAl Blueprint created for a client. It includes details such as the blueprint ID, d	Da	
Client	Represents a prospective or current client. It stores details such as client name, industry, contact in	Da	
Demo Objectives	A list of objectives that the demonstration aims to achieve.	Text	
Environment Details	Details about the environment required for the demonstration, such as software versions and confi	Text	
Feedback Notes	Notes and feedback gathered from the client during and after the demonstration.	Text	
Follow-Up Actions	A list of actions to be taken following the demonstration, such as sending additional information or	Text	
Sales Opportunity	Represents a potential sales deal. It includes details such as the opportunity name, client, estimate	Da	
Solution Focus	The specific product or solution that will be the focus of the demonstration.	Text	
Case ID	Unique identifier for this individual case instance	Text	~
Case Label	Label for this individual case instance	Text	~
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	✓
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Executive Summary

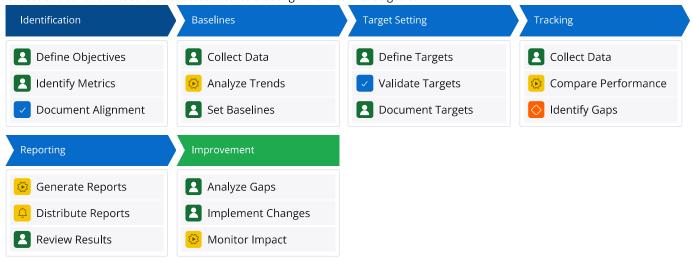
This case type manages the creation of an executive summary that provides a high-level overview of the proposed solution and its benefits. It includes summarizing the client's needs, outlining the proposed solution, and highlighting the key value drivers. The goal is to provide decision-makers with a concise and compelling overview of the opportunity.



Field Name	Description	Туре	Primary
Client Needs Sum	A concise summary of the client's key needs and pain points, as identified during the discovery pha	Text	~
Key Value Drivers	A summary of the key value drivers for the proposed solution, including quantifiable benefits and st		✓
Proposed Solution	A high-level outline of the proposed solution, including the key components and how they address t	Text	✓
Blueprint	Reference to the Pega GenAl Blueprint used in the proposed solution.	Da	
Client	Reference to the client for whom the solution is being proposed.	Da	
Document List	List of supporting documents attached to the executive summary.	Da	
Executive Summar	Additional notes or comments related to the executive summary.	Text	
Executive Summar	Summar The current status of the executive summary (e.g., Draft, Review, Approved).		
Sales Opportunity	y Reference to the related sales opportunity.		
Target Audience	The intended audience for the executive summary (e.g., C-level executives, board members).		
Case ID	Unique identifier for this individual case instance	Text	✓
Case Label	Label for this individual case instance	Text	~
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Success Metrics

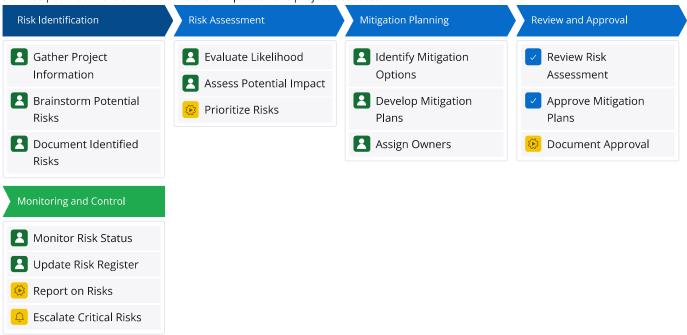
This case type focuses on defining the key success metrics for the proposed solution, ensuring that its impact can be measured and tracked. It includes identifying the relevant metrics, establishing baseline values, and setting targets for improvement. The outcome is a set of clear and measurable success metrics that align with the client's goals.



Field Name	Description	Туре	Primary
Baseline Metric Val	The current value of the success metric before the solution is implemented.	De	~
Client	Reference to the client for whom the success metrics are being defined.	Da	~
Target Metric Value	The desired value for the success metric that the solution aims to achieve.	De	✓
Data Source	The system or source from which the success metric data will be obtained.	Text	
Measurement Freq	How often the success metric will be measured and tracked (e.g., weekly, monthly, quarterly).	Text	
Metric Category	The category or type of success metric (e.g., financial, operational, customer satisfaction).	Text	
Metric Definition	A detailed explanation of what the success metric measures and how it is calculated.	Text	
Metric Owner	The individual or team responsible for monitoring and reporting on the success metric.	Text	
Reporting Require	Specific requirements for how the success metric data should be reported and visualized.	Text	
Sales Opportunity	Reference to the sales opportunity associated with the success metrics.	Da	
Case ID	Unique identifier for this individual case instance	Text	✓
Case Label	Label for this individual case instance	Text	✓
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	
Work Status	Work status of the case	Text	~

Risk Assessment

This case type manages the identification and assessment of potential risks associated with the proposed solution. It includes identifying potential risks, assessing their likelihood and impact, and developing mitigation strategies. The goal is to proactively address potential risks and minimize their impact on the project's success.



Field Name	Description	Туре	Primary
Impact	The potential consequences or effects of the risk if it occurs, measured in terms of financial loss, sc	Cu	~
Risk Name	A concise name or title for the identified risk.	Text	~
Risk Owner	The individual or team responsible for monitoring and managing the risk.	Text	~
Sales Opportunity	Reference to the sales opportunity associated with this risk assessment.	Da	~
Contingency Plan	Alternative actions to take if the mitigation strategy fails or is not fully effective.	Text	
Likelihood	The probability or chance of the risk occurring, expressed as a percentage or qualitative scale (e.g., l	Per	
Mitigation Strategy	The planned actions or measures to reduce the likelihood or impact of the risk.	Text	
Risk Category	The category or type of risk, such as technical, financial, operational, or strategic.	Text	
Risk Description	A detailed explanation of the nature of the risk, including its potential causes and consequences.	Text	
Target Resolution	The date by which the mitigation strategy or contingency plan should be implemented.	Date	
Case ID	Unique identifier for this individual case instance	Text	~
Case Label	Label for this individual case instance	Text	~
Created by	User that created the case	Text	
Created date/time	Date/time case was created	Da	
Description	Description for this individual case instance	Text	~
Resolved by	User that resolved the case	Text	
Resolved date/time	Date/time case was resolved	Da	
Urgency	Priority/urgency of the case	De	

Field Name	Description	Туре	Primary
Work Status	Work status of the case	Text	✓

☼ Data Objects & Integrations

Client

Represents a prospective or current client. It stores details such as client name, industry, contact information, and key stakeholders. This data object is crucial for managing client relationships and tracking interactions throughout the sales process, and it should be synchronized with a CRM system.

Field Name	Description	Туре	Primary
Client ID	Unique identifier for the client within the system.	Text	
Client Name	The official name of the client organization.	Text	
Client Status	The current status of the client (e.g., Active, Inactive, Prospect).	Text	
Contact Information	Details for contacting the client, including phone number and email.	Text	
Key Stakeholders	List of key individuals within the client organization who are involved in the decision-making process.	Text	
Sales Stage	The current stage of the sales process for this client (e.g., Prospecting, Qualification, Proposal).	Text	
Account Manager	The name of the account manager responsible for the client.	Text	
Client Since	The date when the client relationship began.	Date	
Industry	The primary industry in which the client operates.	Text	
MEDDPICC	Reference to the MEDDPICC data related to the client.	Text	

Blueprint

Represents a Pega GenAl Blueprint created for a client. It includes details such as the blueprint ID, description, creation date, and associated client. This data object is essential for tracking the evolution of the proposed solution and its alignment with client requirements, and it should be integrated with the Pega GenAl Blueprint repository.

Field Name	Description	Туре	Primary
Blueprint ID	Unique identifier for the Blueprint.	Text	
Blueprint Name	Name of the Blueprint.	Text	
Client	Client associated with the Blueprint.	Text	
Associated Documents	Links to supporting documents related to the Blueprint.	URL	
Created By	User who created the Blueprint.	Text	
Creation Date	Date when the Blueprint was created.	Date	
Description	Detailed explanation of the Blueprint's purpose and functionality.	Text	
Last Modified Date	Date when the Blueprint was last modified.	DateTime	
Status	Current status of the Blueprint (e.g., Draft, Approved, In Development).	Text	
Version	Version number of the Blueprint.	Text	

MEDDPICC

Represents the MEDDPICC criteria for a sales opportunity. It includes fields for Metrics, Economic Buyer, Decision Criteria, Decision Process, Paper Process, Implication of Pain, Champion, and Competition. This data object is used to assess the viability and progress of a sales deal, and it should be linked to the Opportunity data object.

Field Name	Description	Туре	Primary
Champion	The individual within the client organization who supports the proposed solution and advocates for it.	Text	
Decision Criteria	The specific factors the client uses to evaluate competing solutions.	Text	
Economic Buyer	The individual who has the authority to approve the budget and sign off on the purchase.	Text	
Implication Of P	The negative consequences the client experiences if they do not address their business needs.	Text	
Metrics	Quantifiable measurements of the client's business goals and how the proposed solution will impact t	Text	
Opportunity ID	Unique identifier for the sales opportunity associated with the MEDDPICC data.	Text	
Assessment Date	Date when the MEDDPICC assessment was last updated.	Date	
Competition	The alternative solutions the client is considering, including other vendors and internal options.	Text	
Decision Process	The steps the client follows to make a purchase decision, including approvals and timelines.	Text	
Paper Process	The client's internal procurement and legal review processes.	Text	

Sales Opportunity

Represents a potential sales deal. It includes details such as the opportunity name, client, estimated value, close date, and stage. This data object is central to tracking the progress of a deal through the sales pipeline, and it should be integrated with a CRM system.

Field Name	Description	Туре	Primary
Client	The client or company associated with the sales opportunity.	Text	
Close Date	The estimated date when the sales opportunity is expected to close.	Date	
Estimated Value	The estimated monetary value of the sales opportunity.	Currency	
Opportunity Name	The name or title of the sales opportunity.	Text	
Stage	The current stage of the sales opportunity in the sales pipeline.	Text	
MEDDPICC	The MEDDPICC criteria for a sales opportunity.	Text	
Next Step	The next step to be taken in the sales process.	Text	
Probability	The probability of closing the sales opportunity.	Percentage	
Sales Rep	The sales representative responsible for the sales opportunity.	Text	
Solution	The proposed solution for the client.	Text	

Competitor

Represents a competitor in a sales opportunity. It includes details such as the competitor's name, strengths, weaknesses, and strategies. This data object is used to analyze the competitive landscape and develop effective counter-strategies, and it should be linked to the Sales Opportunity data object.

Field Name	Description	Туре	Primary
Competitive Advantage	Unique factors that differentiate the competitor from others.	Text	
Competitor Name	The official name of the competitor.	Text	
Customer Base	The types and sizes of customers the competitor typically serves.	Text	
Market Share	The percentage of the market controlled by the competitor.	Percentage	
Pricing Model	The competitor's pricing strategy for similar products or services.	Text	
Sales Tactics	Common sales techniques and approaches used by the competitor.	Text	
Strategies	The competitor's approaches to winning deals and gaining market share.	Text	
Strengths	Key advantages and capabilities of the competitor.	Text	
Technology Stack	The technologies and platforms used by the competitor.	Text	
Weaknesses	Areas where the competitor is vulnerable or underperforming.	Text	

Supporting Document

Represents a document provided by the client or created internally to support the sales process. It includes details such as the document name, type, upload date, and associated client. This data object is used to manage and track all relevant documentation, and it should be integrated with a document management system.

Field Name	Description	Туре	Primary
Associated Client	The client associated with the document.	Text	
Document ID	Unique identifier for the document.	Text	
Document Name	The name of the supporting document.	Text	
Document Type	The type of document (e.g., PDF, Word, Spreadsheet).	Text	
Upload Date	The date when the document was uploaded.	Date	
Author	The author of the document.	Text	
Document Status	The status of the document (e.g., Draft, Approved, Rejected).	Text	
File Size	The size of the document file.	Decimal	
Keywords	Keywords associated with the document for search purposes.	Text	
Version Number	The version number of the document.	Integer	

➢ Personas

Account Manager

Responsible for managing client relationships and guiding them through the sales process. They use the application to engage with clients, understand their needs, and present Pega GenAl Blueprints as solutions. They also track client interactions and manage the sales pipeline.

Business Development Expert

Focuses on identifying and developing new business opportunities. They leverage the application to engage potential clients, showcase the value of Pega GenAl Blueprints, and manage the initial stages of the sales process. They also gather client feedback and requirements.

Client Solution Architect

Collaborates with clients to design and implement solutions using Pega GenAl Blueprints. They use the application to create workflows tailored to client needs, iterate on designs based on feedback, and ensure the solution aligns with client requirements. They also provide training and support to clients.

Client Stakeholder

Represents the client's interests and provides feedback on the proposed solutions. They use the application to review Pega GenAl Blueprints, provide input on design iterations, and ensure the solution meets their organization's needs. They also participate in pilot programs and procurement processes.

Sales Operations Manager

Oversees the sales process and ensures it aligns with MEDDPICC methodology. They use the application to track deal progress, monitor client engagement, and identify areas for improvement in the sales process. They also generate reports and analyze sales data.

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