

**Step-by-Step Guide to Building a GenAI Coach Widget in Older Pega and Integrating with a Corporate LLM**

Building a GenAI Coach-like widget in an older version of Pega and embedding it with your company's proprietary LLM involves several key steps. While recent Pega versions (e.g., Pega Infinity, Constellation UI) offer native GenAI Coach components and simple web embeds, older versions require more manual integration. Below is a detailed, step-by-step process:

**1. Define Your Use Case and Requirements**

* Identify the specific business process or workflow where the GenAI Coach will be embedded (e.g., opportunity management, customer service).
* List the types of questions or tasks the Coach should handle.
* Document the data sources and Pega case types the Coach needs to access.

**2. Design the GenAI Coach Widget**

* Decide if the widget will be a floating chat-style assistant, a sidebar, or an embedded panel.
* Design the UI/UX using Pega’s section rules or harnesses, ensuring it can display conversational content and accept user queries.

**3. Build the Widget in Pega**

* In Dev Studio, create a new section or harness to serve as the container for your GenAI Coach widget.
* Add UI elements (text area for questions, display area for responses, buttons for quick actions).
* If your Pega version supports it, use the “Web Embed” channel to generate embeddable code for use outside Pega[[1]](#fn1)[[2]](#fn2). For older versions, you may need to use a Pega Mashup (iframe-based) or custom HTML/JS integration.

**4. Integrate with Your Corporate LLM**

* **Create a Connector:** In Pega, set up a REST connector to communicate with your company’s LLM/model endpoint.
  + Define the request and response structure.
  + Secure the integration with authentication as required by your corporate LLM.
* **Data Flow:** When a user submits a query in the widget, trigger a data transform or activity to:
  + Gather context (user info, relevant case data).
  + Format and send the request to the LLM via the connector.
  + Receive and parse the LLM’s response.
  + Display the response in the widget.

**5. Configure Context and Prompt Engineering**

* Instruct the LLM with system prompts that define the GenAI Coach’s role and expected tone (e.g., “You are a helpful assistant for sales managers”)[[3]](#fn3)[[4]](#fn4).
* Optionally, pre-configure starter questions and quick-select options for common queries[[3]](#fn3)[[4]](#fn4).
* Pass relevant business context (e.g., opportunity details, user role) with each query to improve answer relevance[[4]](#fn4).

**6. Add Data Sources for Contextual Answers**

* Use Pega data pages to fetch real-time data needed by the LLM (e.g., case details, customer info)[[3]](#fn3)[[4]](#fn4).
* Map and transform this data into a format consumable by your LLM, possibly as part of the prompt.

**7. Embed the Widget in Pega or External Sites**

* **Inside Pega:** Add the widget section/harness to relevant portals or landing pages (e.g., Opportunities, Customer Service).
* **External Sites:** If you need to embed the widget outside Pega:
  + Use the Web Embed channel if available[[1]](#fn1).
  + For older versions, embed via Pega Mashup (iframe) or expose the widget as a web component and insert it into your site[[2]](#fn2)[[1]](#fn1).

**8. Test and Iterate**

* Test the end-to-end flow: user query → LLM request → response display.
* Validate with real users and iterate on prompt design, UI, and data integration for best results.

**9. Secure and Monitor**

* Ensure all data exchanges with the LLM are secure and compliant with your company’s policies.
* Monitor usage, performance, and feedback to continuously improve the GenAI Coach.

**Summary Table: Key Steps**

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| --- | --- | --- |
| Step | Pega Task/Feature | LLM Integration Task |
| Define requirements | Document case types, UI needs | Identify LLM endpoint, prompt needs |
| Design widget | Section/Harness, UI rules | - |
| Build widget | Section, Mashup, or Web Embed | - |
| Integrate LLM | REST Connector, Data Transforms | Expose API, secure access |
| Configure prompts/context | System instructions, data pages | Prompt engineering, context injection |
| Add data sources | Data pages, transforms | Map data to prompt |
| Embed widget | Add to portal/page, Mashup | - |
| Test and iterate | User testing, feedback | Refine prompts, handle edge cases |
| Secure and monitor | Access control, logging | API monitoring, compliance |

**References and Further Reading**

* [Pega Academy: Creating Pega GenAI Opportunity Landing Page Coach][[3]](#fn3)
* [Pega Academy: Creating a new Pega GenAI Opportunity Case Coach][[4]](#fn4)
* [Pega Academy: Constellation Web Embed][[1]](#fn1)
* [Pega Support Center: Configuration of Web Embed][[2]](#fn2)

By following these steps, you can build a GenAI Coach-style widget in an older Pega version and connect it to your corporate LLM, enabling advanced generative AI assistance within your business workflows[[3]](#fn3)[[4]](#fn4)[[1]](#fn1)[[2]](#fn2)[[5]](#fn5).

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1. <https://academy.pega.com/topic/constellation-web-embed/v1>

1. <https://support.pega.com/discussion/configuration-web-embed>

1. <https://academy.pega.com/challenge/creating-pega-genai-opportunity-landing-page-coach/v1>

1. <https://academy.pega.com/topic/creating-new-pega-genai-opportunity-case-coach/v1>

1. <https://www.cxtoday.com/crm/pegasystems-steps-closer-to-its-autonomous-enterprise-vision-with-new-genai-solutions/>