Lucky Shobhnani

Pega Certified Lead System Architect

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Professional Summary	

- Pega Certified Lead System Architect (**CLSA**) with 8+ years of progressive experience in architecting, designing, and implementing end-to-end enterprise-grade solutions on the Pega platform across diverse domains including Banking, Finance, Securities, and Healthcare.
- Specialized in **Pega Customer Service** with proven expertise in implementing Digital Messaging (WhatsApp, Facebook Messenger, Web Chat), AI-powered service automation, and constellation-based responsive UIs for high-volume customer service operations.
- Deep experience in designing Interaction Lifecycle, contextual knowledge surfaces, and omnichannel customer engagement flows using Pega Knowledge Management, Pega Insights, and Customer Decision Hub (CDH).
- Successfully demonstrated innovation through delivery of Knowledge Buddy POC at PegaWorld 2024, showcasing dynamic checklist generation using AI vector indexing and prompt engineering.
- Skilled in modern UI development using **Constellation** and Theme Cosmos, delivering pixel-perfect, accessible, and scalable interfaces.
- Strong command over integration patterns, including Connect REST, Connect SOAP, Connect SQL, and legacy-to-modern migrations (Java → Pega).
- Experience in performance optimization, async processing, and resolving memory bottlenecks through design and thread-level analysis.
- Adept at leading teams of developers and SSAs, driving design reviews, guardrail compliance, code quality audits, and end-to-end delivery ownership.
- Worked closely with product owners, architects, and stakeholders, actively participating in agile ceremonies and roadmap planning.
- Hands-on experience in Pega upgrades, deployment pipelines, and configuration best practices across development and production environments.

- Around 8 years of experience in solution design, estimation, and development in various versions of the Pega platform.
- Domain experience includes Banking, Finance, Securities, and Healthcare.
- Extensive experience in Pega Customer Service, Chat integration, Pega Knowledge and Management Pega Decisioning (CDH).
- Developed and demonstrated a Proof of Concept (POC) for Knowledge Buddy, showcasing its capabilities at PegaWorld.
- Strong knowledge in various PRPC components like Activities, Data Transforms, Decision rules, Declarative Rules, Case Management etc.
- Experience in integration using Pega Connectors, i.e., Connect-REST, , Connect Soap and Connect SQL.

- Good at high level understanding of applications, class structure and data model.
- Having knowledge at Email Listeners and Email Accounts.
- Exposure to Pega Constellation and Theme Cosmos, utilizing modern UI frameworks to deliver an enhanced user experience with a focus on responsive and intuitive interfaces..
- Extensive Knowledge in Upgrading the Applications to Latest PRPC Version.
- Team Player, Result Oriented, Fast Learner, well Adapted to challenging Environments, Strong Work Ethics and Commitment to work, willed well served to achieve client Objectives
- **Worked thoroughly on Pega Insights** to design, configure, and optimize reports and dashboards that deliver actionable metrics across customer service operations.
- Worked on Agentic AI capabilities for Pega Customer Service implementation
- Having good experience in code deployment to higher environments
- Strong problem solving and technical skills combined

Work Experience

Organization	Designation	Period
Aaseya IT Services Pvt Ltd.	Principal Consultant consultant	Feb 2021 - till date
PegaSystems	Solutions Engineer	Oct 2019 - Feb 2021
Capgemini	Senior Analyst	Aug 2017 - Oct 2019

Certifications

- Pega Certified Lead System Architect
- Pega Certified Data Scientist
- Pega Certified Senior System Architect
- Pega Certified System Architect

Project Experience

Project Name	Financial client Customer Service Chat Implementation
Client	MCM
Role	Pega Developer
Version	Pega Infinity 24.2
Duration	September 2024- Present

Project Description:

Client is a global specialty finance company that provides debt recovery solutions and purchases non-performing loans from major banks and financial institutions. The company operates across the U.S., Europe, and other international markets through its subsidiaries.

As part of their digital transformation journey, this project aimed to implement **Pega Customer Service** to streamline customer support operations. The engagement focused on deploying the **entire customer service lifecycle**, starting with **chat-based interactions** using digital messaging channels.

.**Responsibilities and Contribution:**

- **Implemented Pega Messaging** across digital messaging channels (WhatsApp, Facebook Messenger, etc.) **single-handedly**, including configuration, integration, and end-to-end testing.
- Took a deep dive into the **Pega Customer Service system architecture**, exploring and understanding platform behavior to deliver a stable and scalable solution.
- Successfully **implemented Interaction Lifecycle** as per the business lead's design, ensuring consistent context management and seamless customer experience across interactions.
- **Led a team of Senior System Architects (SSAs)** to deliver customer-specific requirements, following best practices and adhering to Pega guardrails.
- **Extensively worked on Pega Constellation**, delivering responsive and modern UI components as part of the latest architecture stack.
- Integrated **Pega Knowledge Management** into the chat experience, enabling contextual knowledge articles during customer service interactions.
- **Worked thoroughly on Pega Insights** to design, configure, and optimize reports and dashboards that deliver actionable metrics across customer service operations.
- Played a key role in discussions with stakeholders and product owners to define and refine requirements, while ensuring timely and quality delivery.

Project Name	Knowledge Buddy POC
Client	CMC
Role	Pega Developer
Version	Pega Infinity 23
Duration	March 2024- June 2024

Project Description:

Developed and demonstrated a Proof of Concept (POC) for Knowledge Buddy, showcasing its capabilities at PegaWorld 2024.

By leveraging Pega Knowledge Buddy, the system dynamically generates inspection checklists, ensuring compliance and efficiency. The co-pilot feature further enhances the inspection process by providing real-time guidance and insights.

.**Responsibilities and Contribution:**

- Understood Structure and working of knowledge buddy.
- Led a team of five members in designing and implementing the Knowledge Buddy POC.
- Implemented Knowledge buddy as copilot.
- Analyzed and fine-tuned vector-based document processing, understanding how similarity scores and AI-driven recommendations influence checklist generation.
- Directly extracted checklist and other required information from document and shared it with inspector on fly.
- Optimized Pega Knowledge Buddy's prompt processing and vector indexing, ensuring high-accuracy recommendations tailored to each inspection scenario.

Project Name	StepChange PAP Redesign
Client	CMC
Role	Pega Developer
Version	Pega8.6/Pega 8.8
Duration	September 2022- August 2024

Project Description:

Personal action plan – PAP is generated as part of debt advice case. The current process is synchronous i.e. the PAP is generated on Web nodes. During the earlier performance reviews, it was established that the PAP generation is a memory intensive process and tends to shoot up the CPU utilization of web node JVMs. s to free up the web nodes to avoid JVM memory issues.

.**Responsibilities and Contribution:**

- Helped in Implementing End to End journey Debt Advice case.
- Worked on stabilizing environments.
- Working on implementing Digital messaging channels in place of existing legacy chat channel.
- Understood working of pd4ml and created workarounds for bugs in java script that surpasses limitation by PD4ml and gives better results.
- Converted the current Design code to Async approach using round robin fashion for selecting node type.
- Created custom HTML , CSS code to meet complex requirements for PDF generation UI page.
- Designed new Styles for PAP engine .
- Coordinated Individually from off shore, involved in gathering requirement from client resources and delivering them.
- Fixed the performance issues.
- Validation, defect fixing, and unit testing

Project Experience

Project Name	CMC Upgrade to 8.6

Client	CMC
Role	Pega Developer
Version	Pega 8.6

Project Description:

Pega CRM application for CMC markets focus on managing end user's profile. As part of our contract with CMC, we have helped them enhance some of their existing implementation along with developing some new functionality related to Financial Crime, Bank Details, Manage Sales Trader, Restricted List etc. We were also involved in migrating some of their legacy Java functions to Pega which will eventually help them by reducing the dependency on other teams and legacy can be gradually phased out.

Responsibilities and Contribution:

- Helped in Implementing End to End journey For Pega call and configured CTI channel for avaya.
- Worked on stabilizing environments.
- Coordinated Individually from offshore, involved in gathering requirement from client resources and delivering them.
- Fixed the performance issues.
- Attending Status calls every week for updating onsite counterpart and about the status of developing and unit testing.
- Modified old UI and logics to support OOTBs rules.
- Created Custom UI controls as per clients requirement
- Worked on User Interfaces like Harness, Section and Declarative Rules
- Modified UIs to support templatized based UI
- Configured Email Listeners to Handle Inbound emails
- Performed configuration reviews to ensure a guardrail score of over 90%.
- Got appreciation from customer to achieve the goal on time.
- Validation, defect fixing, and unit testing

Project Name	CMC REST Implemententation
Client	CMC
Role	Pega Developer
Version	Pega 7.4

Project Description:

Pega CRM application for CMC markets focus on managing end user's profile.CMC were using legacy java code and RMI to complete processes that made system very slow and wee causing many issues so REST was introduced to improve system's performance.

Responsibilities and Contribution:

- Converted Legacy Java RMI to Connect - REST
- Daily status calls with client & weekly demonstration of the application with Business users.
- Worked on requirement specifications closely with the business.
- Reviewing PRPC logs and alert logs to identify the exceptions that hamper the system and apply the fix to those exceptions or handle those exceptions.

- Created custom log appender and handled multiple custom requirements

- Testing and debugging using tracer, clipboard, rule inspector and log files.

Project Name	Pega Customer Service
Client	Pegasystems
Role	Senior System Architect
Version	Pega 8.4,8.5

Project Description:

Pega Customer Service is the premier customer service application that predicts and manages today's customer journey on a global scale. Part of Pega's CRM Suite, Pega Customer Service can helps in Anticipating what's right for customers, Connect customers to the right people and systems.

Responsibilities and Contribution:

- Helped in creating new Architecture of Integration Flow as part of 8.6 Upgrades.
- Helped in creation of templatized sections to support New UI
- Configuration review and documentation, validation, defect fixing, and unit testing
- Implemented Change Requests (CR) on updated business requirements
- Worked on Creation of flows, sections, data transforms, flow actions, Activities, Decision rules
- Unit Test Case preparation and Unit Testing
- Participate in Daily scrum calls, iteration, and sprint planning meetings. Requirement Analysis and Design Approaches
- Coordinating with BA for Estimating the user story delivery points Involve in deployment of each sprint

Project Name	Pega Knowledge Management
Client	Pegasystems
Role	Senior System Architect
Version	Pega 7.4, Pega 8.3, 8.4, 8.5

Project Description:

Pega Knowledge is an enterprise knowledge management application that is pre-integrated with Pega Customer Service. The application supports the creation and management of multi-media content that can be suggested to CSRs in the context of the service cases that they are working on. CSRs can also view toprated articles, maintain a list of favorite articles, and search through articles.

Responsibilities and Contribution:

- Carried Out Creation of Articles Via Service REST.
- Added Functionalities to receive files via REST using Multi Part.
- Created Customized Portal which can be configured by end user at run time
- Handled validation, defect fixing, and unit testing.
- Worked on Performance issues.

- Implemented Change Requests (CR) as per product owner requests.

Project Name	Hartmann PEGA implementation
Client	Credit Suisse
Role	Pega Developer
Environment	Pega 7.3

Project Description:

Hartmann as a medicine and medical equipment company produces numbers of materials. So, for keeping the track of the materials, every material have a material number which are present in an external system. Now, Pega helps Hartmann to track the data of the Production plant and Sales Organization of the material and link the information to the external Source.

Responsibilities and Contribution:

- Worked on requirement specifications closely with the business
- Gathered the requirement from the client and updated the business specification document for many of the CoWo's (Collaborative working)
- Understood the architecture of Service Case and implemented several Connectors.
- Worked on following Pega Functionalities:
  - Integration connectors:Connect-REST,Case Management
  - Configuration, reviewing, and documentation
  - Validation, defect fixing, and unit testing

Project Name	Rosch amalia
Client	Rosch(animal sera management)
Role	Pega Developer
Version	Pega 7.3

Project Description:

For various pharmaceutical research, Roche analyses the antibody generation and its behavior to specific antigens in animals. For this process, Roche procures animals from breeders, which are then transferred to external suppliers. The external suppliers then prepare these animals for experimentation. Once the animals are ready, Roche orders antigen injection and blood sample collection as per pre-set schedules. The collected sera samples are then shipped by the external suppliers to the Roche laboratories for analysis.

Responsibilities and Contribution:

- Carried out impact assessment based on available wireframes and design
- Designed the fulfillment flow on the new BPMS [Pega] platform as per the use cases supported by the business

- Worked on the following Pega functionalities: UI, Decisions and declaratives, Flows, activities, SLAs, Agents, Debug
- Technically led configuration, unit testing and defect fixing