



Business Agility in 1:1 Customer Engagement

STUDENT GUIDE

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Agility in a customer engagement project

What is agility?

Agility means that your organization is able to react quickly to changes in the marketplace, an important capability in marketing. In the digital age, things change constantly, and taking weeks or even months to translate a good idea into an actionable plan is bad for business.

Pega 1:1 Operations Manager increases your agility in the digital channels, giving business users everything they need to quickly transition to new content or messaging as needs change or trends emerge.

Business value of agility

Generally, changes in an enterprise application require IT involvement and a full IT development cycle. But business users often want to change things like the description of a product, or its expiration date, or make slight amendments to the risk score computation. In most enterprise applications, even these kinds of changes can be costly.

Pega 1:1 Operations Manager empowers business users to make these sorts of 'business-as-usual' changes themselves. This not only preserves resources, it enables business teams to be more responsive to changing business needs and trends in the marketplace.

Business changes versus enterprise-level changes

Business-as-usual changes are small, day-to-day updates that result from normal business operations in digital touchpoints. It typically falls to the business operations team to satisfy ad-hoc requests from business teams to make these types of incremental changes to optimize existing artifacts. These are usually smaller pieces of work that need fast turnaround, such as:

- Adding a new Action (such as offer or message) with treatments to production
- Removing or disabling an Action in production
- Modifying a group-level Engagement Policy
- Enabling an integrated channel
- Fixing a typo in a call center message provided by Pega Customer Decision Hub™

Enterprise changes tend to require larger pieces of strategic development work and usually disrupt normal operations. These tasks may introduce something new or implement a change in the way something existing is presented or works.

- Adding new data attributes to the customer profile
- Integrating a new channel
- Implementing an approval flow for change requests

Pega 1:1 Operations Manager delivers business agility

Pega 1:1 Operations Manager provides a guided process for managing changes to decisioning artifacts. Business users determine what must change in a collaborative and unified way, and the system helps the user implement the changes by:

- Simplifying change processes and reducing administrative tasks
- Providing an intuitive, task-driven interface that guides the user from task to task
- Facilitating collaboration between operations, business, and technical teams

Agility in a customer engagement project -- Mon, 12/07/2020 - 06:29
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Change management process

Introduction

When business requirements change rapidly, the software development process needs to be more agile, while still producing high quality, reliable software. This topic covers the importance of the change management process, and how it works in a one-to-one customer engagement project for Pega Cloud® customers.

Video



A transcript for this video is not available. Please visit <https://academy.pega.com> to watch.

Transcript

This video describes the change management process in a one-to-one customer engagement project, and the cloud environments provided by Pega to support that process.

Let's start by understanding some background on change management in enterprise software development projects.

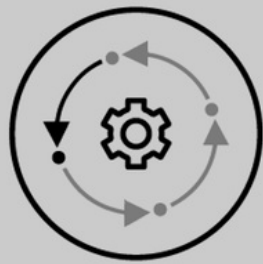
In recent decades, organizations have been using computer software to automate many traditionally manual tasks.



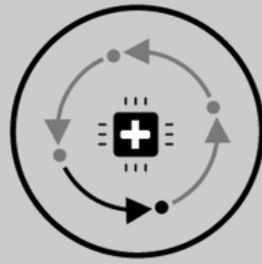
Business processes need to constantly evolve as customer behavior and market conditions change. Naturally, the software that supports business practices needs to evolve as well. As the pace of change of business requirements increases, the software development process needs to be more agile, while still producing high-quality and reliable software.

Here's a simplified view of an enterprise software development cycle. It consists of four high-level stages.

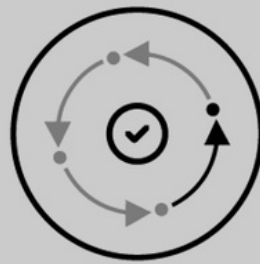
Software development cycle



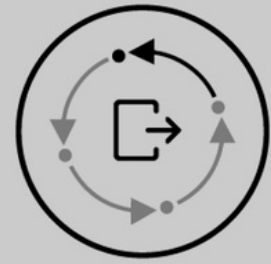
Development



Integration



Testing



Deployment



Developers develop new software or update existing software.

The work from several developers is merged into a single system in the integration phase.

The new software version goes through testing, and the final, approved software (or a software change) is deployed into production, which is the system that supports mission-critical business processes.

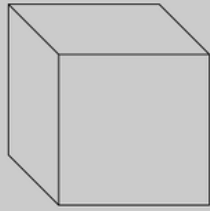
This cycle repeats for new as well as incremental updates to existing software.

A software development process is supported by different environments.

Let's study the environments available to Pega Cloud® customers in support of a one-to-one customer engagement project using Pega Customer Decision Hub™.

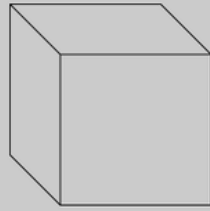
Software development environments

1:1 customer engagement projects on Pega Cloud®

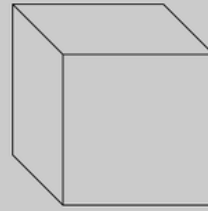


Development

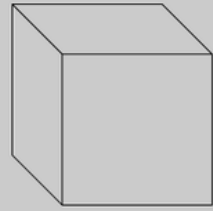
System of records (SOR)



Sandbox



Business
operations



Production

A development environment is one in which developers create new versions of the application by adding enhancements or fixing issues. This system also doubles as a system of record for Pega applications.

A sandbox environment is used for various testing such as functional testing, unit testing and user acceptance testing.

The business operations environment is a replica of the production environment. However, it contains only a sample of the production data. This is where the business operations team creates and tests new business artifacts and conducts simulations.

The production environment is the main system that propagates next best actions to external channels, collects customer responses, and where the AI learning happens. It is also used for live monitoring of key performance indicators.

In a one-to-one customer engagement project, changes to the application can be classified into two categories: enterprise changes and business-as-usual changes.

Enterprise changes are the changes that developers make to the Pega application. An example of enterprise changes are extensions to the core Pega application and its integration points with external systems.

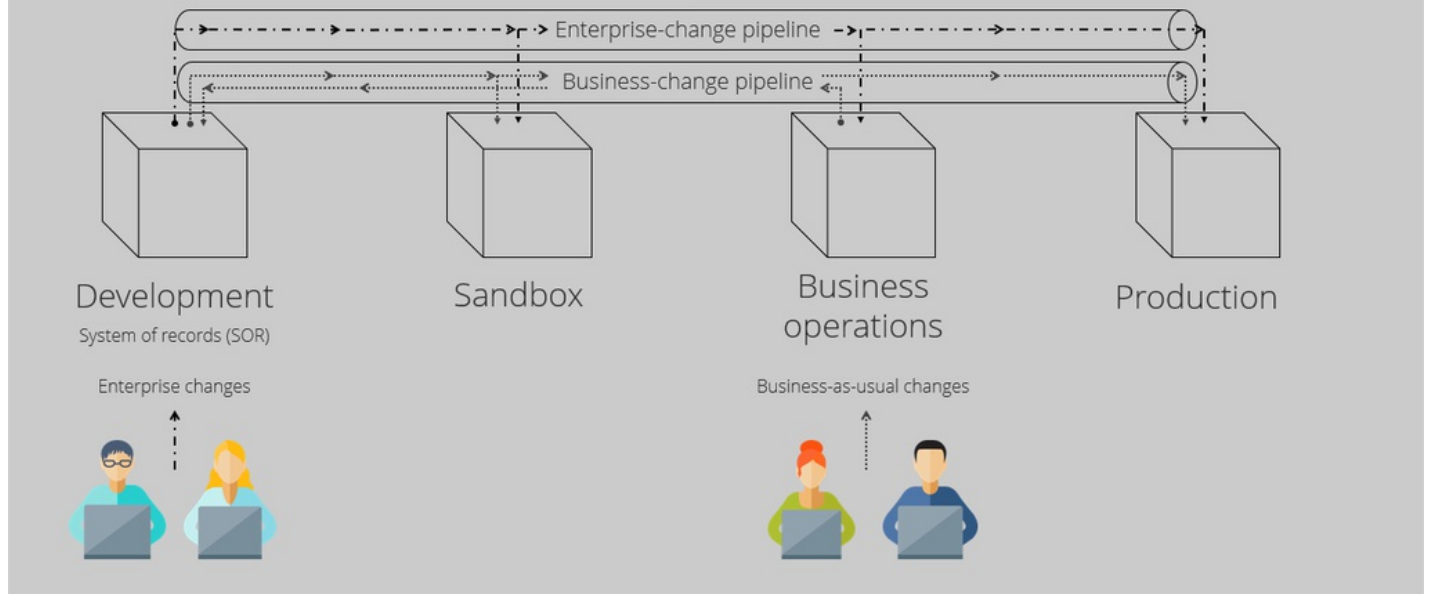
Developers make these changes in the development environment. Changes to the application are pushed to other environments through the enterprise-change pipeline managed by the Pega Deployment Manager™.

Business-as-usual changes are made by the business operations team in the business operations environment. Examples of business-as-usual tasks are: creating a new action or updating an existing action with new treatments or engagement policies. Also, this environment is used to carry out various simulations and analyses, for example, to test if there is an ethical bias in the decisions made by the next-best-action strategy framework.

Changes from the business operations environment are pushed to the development environment and from there to other environments through the business-change pipeline.

Software development environments

1:1 customer engagement projects on Pega Cloud®



You have reached the end of this video which showed you:

- The importance of the change management process in an enterprise software development project.
- The high-level software development cycle.
- The cloud environments provided by Pega for a one-to-one customer engagement project using Pega Customer Decision Hub.
- The flow of enterprise and business changes through the enterprise- and business-change pipelines.

Change management process -- Mon, 12/07/2020 - 06:29

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Building your business operations team

Business operations team

The goal of the business operations team is to bring agility to your change management so your organization can achieve excellence in one-to-one customer engagement.

It is best practice to have a single team for managing business changes at the organization level, typically known as the business operations team. This team includes three types of users.

Business users

Business users create or submit a new business change requirement, known as a change request in the Pega 1:1 Operations Manager application.

Responsible for:

- Planning new offers and messages as next best actions for customers.
- Leveraging next best action to drive performance and meet company goals.

Top activities:

- Planning customer engagement activities.
- Reviewing and approving content and offer distribution.

Examples:

- At a bank, the following job profiles represent business users:



Sheryl Williams

Digital marketing manager
(Credit card division)

U+ Bank

www.uplusbank.com



Ben Stokes

Digital marketing manager
(Personal loan division)

U+ Bank

www.uplusbank.com



Team lead

The team lead reviews and manages priorities for business change requests.

Responsible for:

- Conducting the agile ceremonies, unblocking issues, and managing the day-to-day activities required to support the scrum team. The team lead works with IT to deploy revisions.

Top activities:

- Run daily stand up, show and tell, and sprint retrospective meetings
- Remove blockers impeding team progress
- Ensure compliance with change management best practices and policies
- Work with IT on deployments

Example:

- Team leads are often scrum masters on a business operations team.



It is a best practice to include one team lead for managing your business operations team.

Next-best-action specialists

Next-best-action specialists work on tasks to implement the business changes requested by business users.

Responsible for:

- Implementing and testing offers or messages in the business operations environment.

Top activities:

- Supporting the definition and assessment of business requirements.
- Translating business needs into next-best-action artifacts and strategies.
- Building and testing artifacts to understand their impact.

Examples:

- Next-best-action specialists are often known as the marketing operations team. They have hands-on experience with marketing automation and related software. Next-best-action specialists understand the functions of various marketing artifacts such as actions, treatments, engagement policy, and decision strategies. Next-best-action specialists also have good working knowledge of how next-best-action decisioning works in Pega Customer Decision Hub™.



Davide Achebe

Operations team member

U+ Bank

www.uplusbank.com



Maggie Square

Operations team member

U+ Bank

www.uplusbank.com



Betsy Smith

Operations team member

U+ Bank

www.uplusbank.com

You can scale up operations by adding more team members to this group.

Building your business operations team -- Mon, 12/07/2020 - 06:30

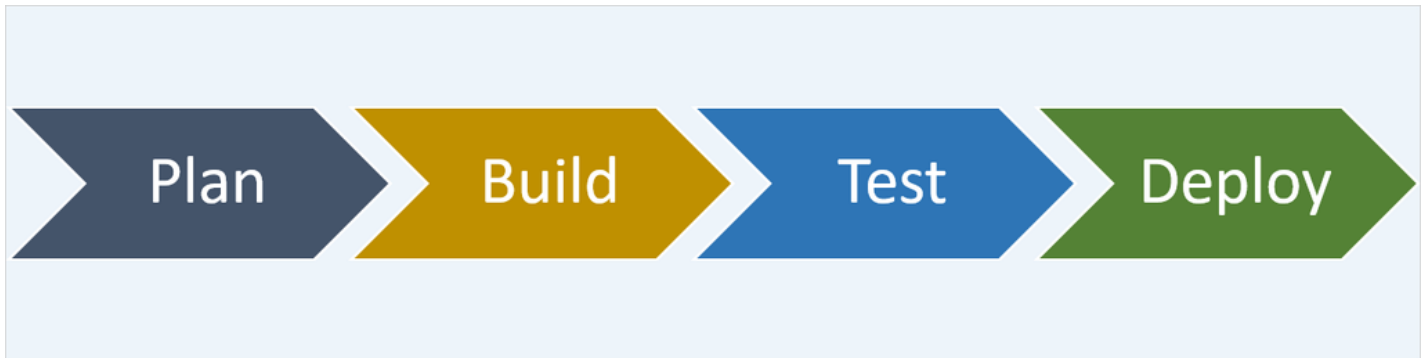
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Lifecycle of a change request

Change request stages

In Pega 1:1 Operations Manager, a change request represents a change to one or more next-best-action artifacts in Pega Customer Decision Hub™. Together, business users determine and agree upon what needs to change, and the system guides the next-best-action specialist to make those changes.

A change request goes through four stages in its lifecycle. Each stage encapsulates the various tasks required to carry out the change effectively. In each stage, a designated user or set of users carries out the required tasks. Once the necessary tasks are complete, the system automatically manages the movement of the change request from one stage to another.



The lifecycle of a change request contains the following four stages:

- Plan
 - A business user creates the change request.
 - **Key** information about the change is captured from the business user directly into Pega 1:1 Operations Manager.
 - The team lead quickly **plans** and prioritizes the request so that the operational team can focus on more high-value work.
- Build
 - The operations team **builds** the next-best-action artifacts using a simple, guided process.
 - Next-best-action specialists translate the change request details into corresponding next-best-action artifacts in Pega Customer Decision Hub.
 - The system automatically creates or updates the corresponding artifacts.
- Test
 - The system recommends that the next-best-action specialists verify and test the generated or modified artifacts to ensure that the change meets the business' expectations.
 - Changes can be tested in-context to reduce QA cycles.
- Deploy
 - The team lead approves the change request and transfers it to the team responsible for deploying the changes to the production environment.
 - Pega Deployment Manager enables the deployment team to safely **deploy** the changes to a production pipeline

Lifecycle of a change request -- Mon, 12/07/2020 - 06:30

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Change request types

Introduction

As a business user, you create a change request to initiate the change management process to make business-as-usual changes to the Pega Customer Decision Hub.

There are three types of change requests currently supported. Selecting the right change request category initiates the appropriate change management process flow.

Create new action

Use the **Create new action** category when submitting a request to create a new action

Change Request

Name *

Promote new card on web - Cash back 5%

Select category

☒ Create new action

☐ Update existing action

☐ Not sure

Completion date *

5/31/2020

Business issue ?

Sales

Group ?

Creditcards

Notes

Create new leads from web channel for new Cash back 5% credit card.

Cancel

Create

Update existing action

Use the **Update existing action** category when submitting a request to update an existing action

Change Request

Name *

Extend sign-up bonus period - Cash back 5%

Select category

☐ Create new action

☒ Update existing action

☐ Not sure

Completion date *

5/31/2020

Business issue ?

Sales

Group ?

Creditcards

Notes

Extend sign up bonus period by 4 weeks on the Cash back 5% card

Cancel

Create

As part of updating an existing action, you can request one or more changes at the action level. The available tasks enable you to add a new treatment, modify the action-level engagement policy and modify the action details.

Select task for this action

☐ Add new treatment

☐ Edit engagement policy

☐ Edit action details

Request type not sure

If you are not sure which change request category to choose, or you cannot find the right business issue and group value and need help creating the request, you can select the **Not sure** category.

A change request with **Not sure** as its category is assigned to a team lead, who then works with the business user to help them select the appropriate change request category.

Change Request

Name *

Promote usage of mobile app - \$25 off on first purchase

Select category

☐ Create new action

☐ Update existing action

☒ Not sure

Completion date *

5/30/2020

Business issue ?

Select business issue

Group ?

Select Group

Notes

We would like to increase number of mobile app downloads by 30 %

Cancel

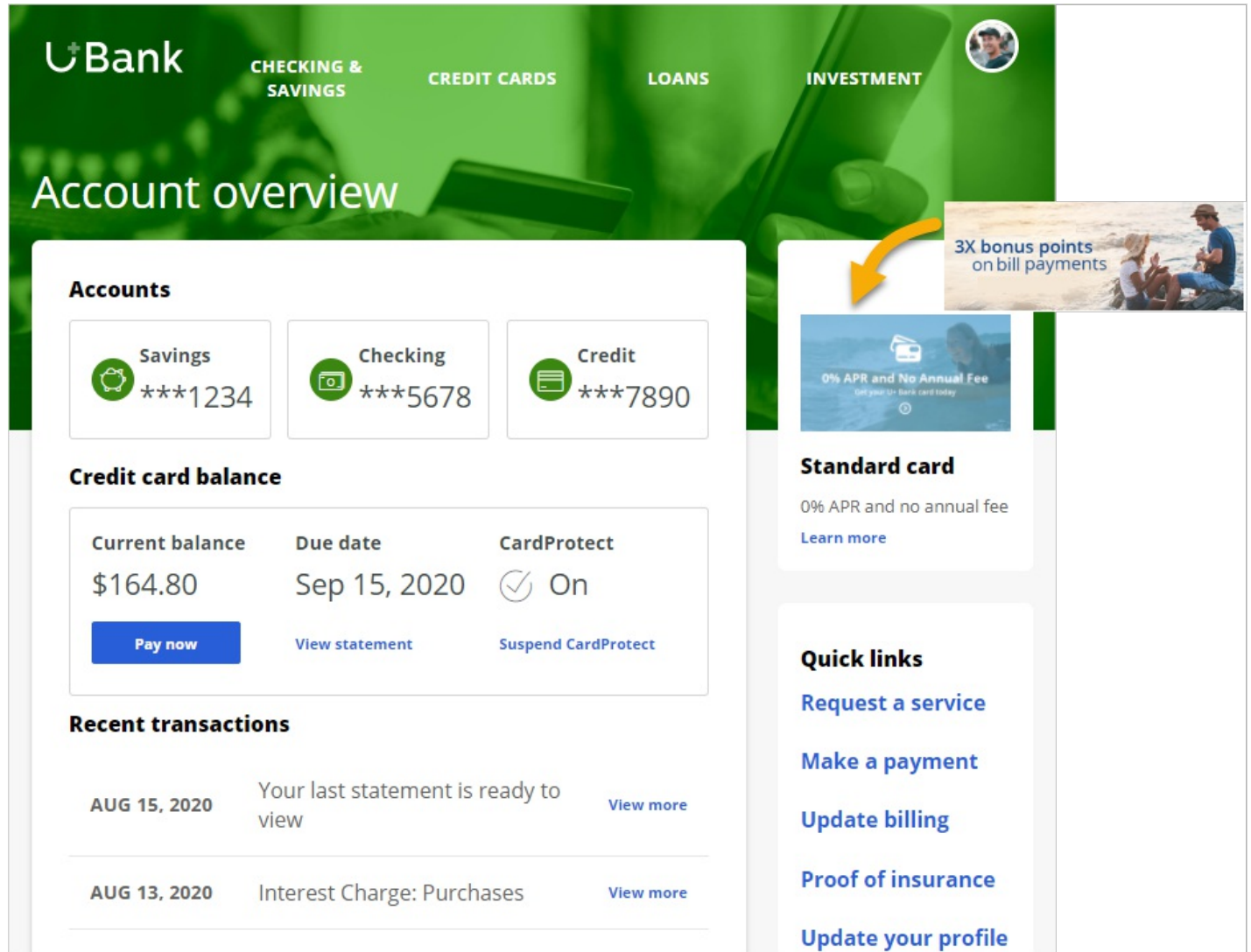
Create

Change request types -- Mon, 12/07/2020 - 06:30
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Submitting a request for a new action

Business scenario

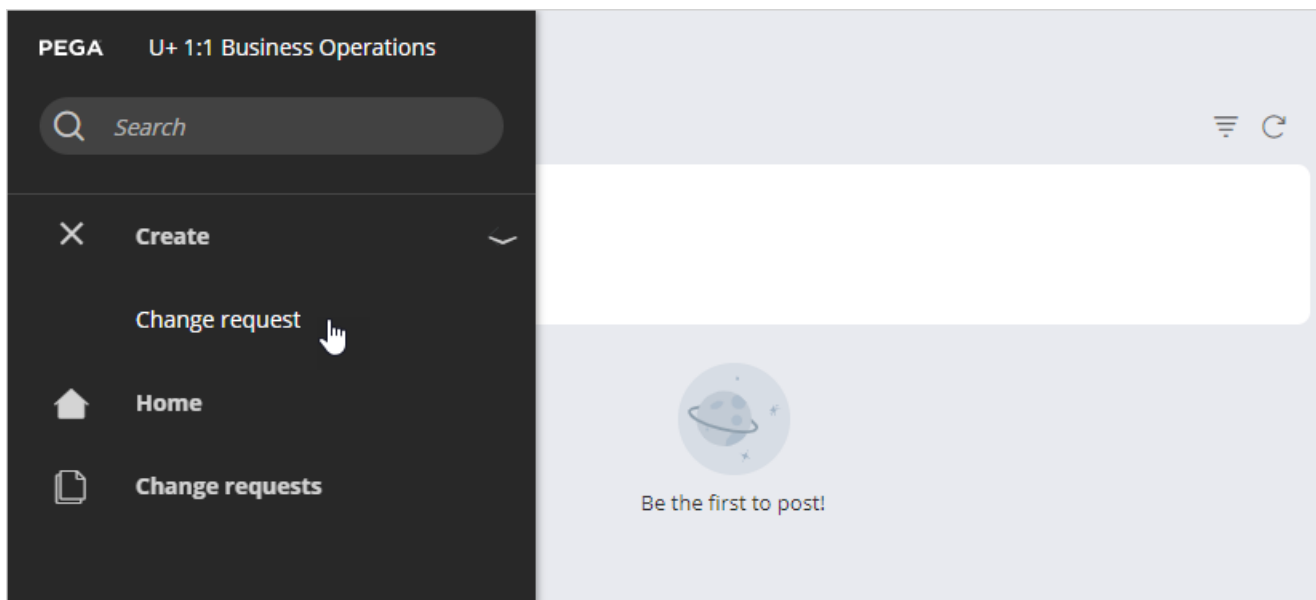
The marketing team at U+ Bank, a retail bank, uses the web self-service portal as a marketing channel. The bank wants to promote the use of credit cards for utility bill payments to all customers who log in to the self-service portal.



Business users and next-best-action specialists use Pega 1:1 Operations Manager to work collaboratively in a business operations environment. Pega 1:1 Operations Manager streamlines the business change management process. With the Pega 1:1 Operations Manager, users introduce changes to Pega Customer Decision Hub using a safe and guided process, test the changes, and conduct simulations before pushing the changes to the production environment.

Creating a new change request

In Pega 1:1 Operations Manager, a change request represents a change to one or more next-best-action artifacts. As a business user, you create a change request to capture the business context of the required change.



In the change request form, enter a name that describes the purpose for submitting the request

Change Request

Name *
New action for bill payment

Select category
☒ Create new action
☐ Update existing action
☐ Not sure

Completion date *
5/31/2020

Business issue ?
Sales

Group ?
Creditcards

Notes
Promote usage of Credit card for utility bill payments

Cancel Create

The change request category indicates the type of change. In this case you want to introduce a new offer, so select **Create new action**.

Select a completion date. As a business user, you provide this as the expected timeframe in which the next-best-action specialists will complete the request.

Select the appropriate **Business issue** and **Group** if you know it. For example, Sales and Credit cards. You can also provide this later.

You can use the **Notes** section to provide any additional business details that will be useful for the next-best-action specialists.

Click **Create** to create the new change request. A new change request is created with a unique ID.

The change request is currently in the **Plan** stage. Notice the task listed under the **To do** section of the change request: **Define attributes**. The purpose of this task is to capture additional details from the business user about the new action to help the next-best-action specialists who will work on it later.

Click **Go** to initiate the task.

The screenshot displays the OpsCR-2 interface for a new action titled "New action for bill payment". The interface is divided into several sections:

- Header:** OpsCR-2 logo, a star icon, and the title "New action for bill payment".
- Navigation:** A horizontal bar with stages: Idea, Plan (selected), Build, Test, and Deploy.
- Left Sidebar:**
 - Edit** button and **Actions** dropdown.
 - Rank:** --
 - Status:** DETAILS NEEDED (in a green box)
 - Request type:** Create new action
 - Completion date:** September 30, 2020
 - Business issue:** Sales
 - Group:** CreditCards
 - Created:** Business User about a minute ago
 - Updated:** Business User less than a minute ago
 - Details** section at the bottom.
- Main Content Area:**
 - To do:** A task labeled "Define attributes" with a "BU" icon. The description is "Specify details for new action (Plan) • Due 2 days from now •". A "Go" button and a menu icon are to the right.
 - Details:**
 - Description:** Promote usage of credit card for utility bill payments
 - Change request details:**
 - Created on:** Sep 10, 2020 at 08:09:21 AM
 - Created by:** Business User
 - Updated on:** Sep 10, 2020 at 08:10:03 AM
 - Updated by:** Business User

In the **Define attributes** section, provide a name for the new action, for example, **Bonus points on utility payments**, and select the **Business Issue** and **Group**. These details can be changed later in collaboration with the next-best-action specialist.

OpsCR-2

New action for bill payment

☆

Edit

Actions ▾

Rank

--

Status

DETAILS NEEDED

Request type

Create new action

Completion date

September 30, 2020

Business issue

Sales

Group

CreditCards

Created

Business User about a minute ago

Updated

Business User less than a minute ago

✓

Idea

Plan

Build

Test

Deploy

BU

Specify details for new action

Due 1 day from now

Define attributes

Define availability

Define engagement policy

Define channels

Name *

Credit card bonus points

Business issue ?

Sales

Group ?

CreditCards

Cancel

Save

Continue

In the **Define availability** section, you can provide details on action availability. The **Completion date** entered while creating the change request is mapped to the **Action start date**.

You can also set values for options that affect action selection during next-best-action arbitration

OpsCR-2

New action for bill payment

Edit

Actions ▾

Rank

Status

DETAILS NEEDED

Request type

Create new action

Completion date

September 30, 2020

Business issue

Sales

Group

CreditCards

Created

Business User 1 hour ago

Updated

Business User less than a minute ago

Details

Pulse

Artifacts

✓

Idea

Plan

Build

Test

Deploy

BU

Define NBA configuration

Due 1 day from now

Define attributes

Define availability

Define engagement policy

Define channels

Availability

✓

Make this action available

Action start date *

9/30/2020

Action end date

Type or select from calendar

Bundle ?

Not a bundle

Priority

☐

Transactional ?

☒

Apply AI to calculate action propensity ?

Business weight (+/-)

%

Business value

Back

Save

Continue

OpsCR-2

New action for bill payment

Edit

Actions ▾

Rank

--

Status

DETAILS NEEDED

Request type

Create new action

Completion date

September 30, 2020

Business issue

Sales

Group

CreditCards

Created

Business User 1 hour ago

Updated

Business User less than a minute ago

Details

Pulse

Artifacts

✓ Idea

Plan

Build

Test

Deploy

BU

Provide engagement policy criteria

Due 1 day from now

Define attributes

Define availability

Define engagement policy

Define channels

Action context ⓘ Customer

eligibility ⓘ

customer owns a card × ▾

Applicability ⓘ

Input text and use value from the displayed list. ▾

Suitability ⓘ

Input text and use value from the displayed list. ▾

Contact policy ⓘ

hide if offer already ac... × ▾

Back

Save

Continue

Finally, in the In **Define channels** section, you can add details about the channel in which the action will be presented. In this case, the bank wants to display this offer on the web channel.

OpsCR-2

☆

New action for bill payment

Edit

Actions ▾

Rank

Status

DETAILS NEEDED

Request type

Create new action

Completion date

September 30, 2020

Business issue

Sales

Group

CreditCards

Created

Business User 1 hour ago

Updated

Business User about a minute ago

Details

Pulse

✓

Idea

Plan

Build

Test

Deploy

BU

Define channels

Due 1 day from now

Define attributes

Define availability

Define engagement policy

Define channels

No channel specified

+ Add channels

Agent assisted

Email

Mobile

Push notification

SMS

Web

Back

Save

Finish

Details

Description

Once you add the web channel, you can provide details for one or more web treatments (for example, placement type such as hero or tile, and the availability date).

OpsCR-2

New action for bill payment

Edit

Actions ▾

Rank

--

Status

DETAILS NEEDED

Request type

Create new action

Completion date

September 30, 2020

Business issue

Sales

Group

CreditCards

Created

Business User 1 hour ago

Updated

Business User about a minute ago

Details

Pulse

Artifacts

✓

Idea

Plan

Build

Test

Deploy

BU

Define channels

Due 1 day from now

Define attributes

Define availability

Define engagement policy

Define channels

Channels ?

+ Add channels

Web

Treatment 1

Name *

Credit card bonus points tile

Identifier

Creditcardbonuspointstile

Placement type

Tile

☒ Make this treatment available

Availability start date *9/30/2020

End date

Add web treatment

Back


Save

Finish


To change any of the values in any of the previous sections, click **Back** and change the values. Click **Save** to save the values, and then come back and edit later.

Click **Finish** to complete the task.

OpsCR-2



New action for bill payment



Edit

Actions ▾

Rank

--

Status

DETAILS NEEDED

Request type

Create new action

Completion date

September 30, 2020

Business issue

Sales

Group

CreditCards

Created

Business User 21 hours ago

Updated

Business User 19 hours ago

Details

Pulse

Thank you! The next step in this case has been routed appropriately.

Get next

✕

✓ Idea

Plan

Build

Test

Deploy

To do

C

Rank change request

Rank change request (Plan) • Due 4 days from now •

⋮

Pulse

Q Search

✕ ▾

☰ ↻

🌐 Post ▾

BU

Start a conversation

BU

Business User

19 hours ago

Completed task-Define details

💬 Comment

👍 Like

Submitting a request for a new action -- Mon, 12/07/2020 - 06:31

To get the full experience of this content, please visit <https://academy.pega.com>

Prioritizing a change request

Business scenario

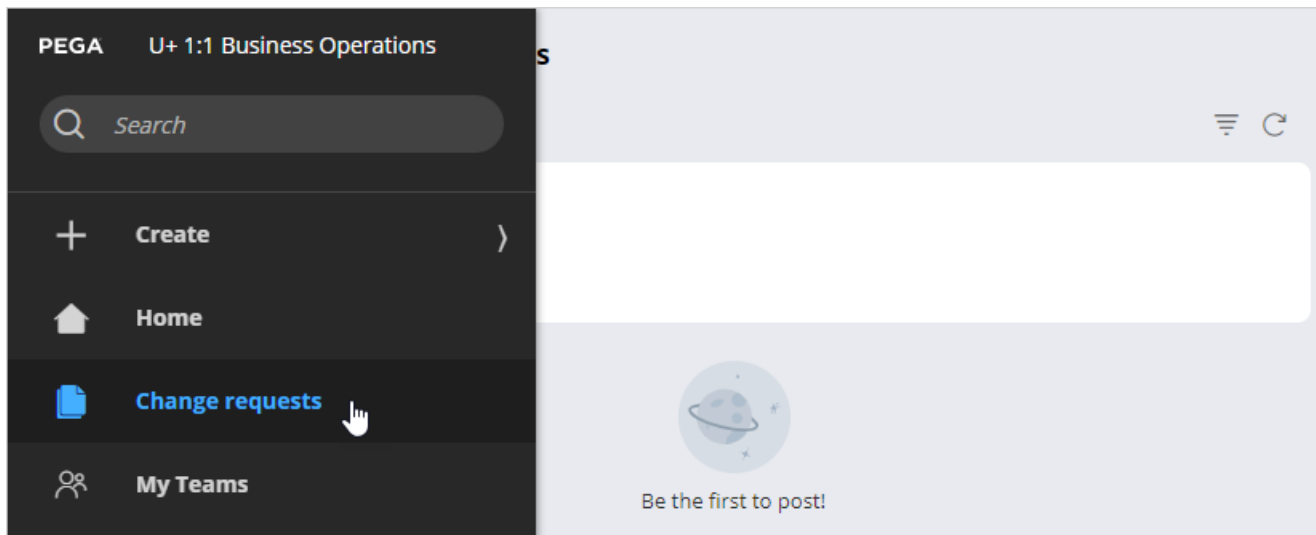
A business user submits a change request to create a new action intended to promote the use of credit cards for utility bill payments. A promotional message is displayed to all customers who log in to the self-service portal on the U+ Bank website. The business user has provided details for the action attributes by completing the **Define attributes** task.

The next task, **Rank change request** is ready to be worked on by the team lead. As a team lead, your responsibility is to prioritize the available change requests and to complete this task so that the next-best-action specialists can plan their day and work on the most important tasks first.

As a team lead, you can access the **Rank change request** tasks from the **Pending approval** work queue from your homepage or from the list of change requests, or from within the change request itself.

Ranking change requests

In the **Change requests** landing page, you can assign or change the rank of change requests



By default, the rank of a new change request is **0**.

On the **Change requests** page, you can access the rank of a change request by clicking the row

Change requests

Change requests by anyone ▼ All stages ▼

Open Closed

Showing 3 of 3

Change requests
3

Idea
0

Plan
3

Build
0

Test
0

Deploy
0

Fields Density Default view ▼ Refresh

Rank	ID	Change request	Stage	Created by	Completion date	Status
1	OpsCR-2	New action ...	Plan	Business User	9/30/20	DETAILS NEEDED
2	OpsCR-1	New action ...	Plan	Business User	9/30/20	DETAILS NEEDED
0	OpsCR-3	Update Rew...	Plan	Business User	9/23/20	DETAILS NEEDED

In the **Rank** field, provide a numerical value that represents the relative priority of the change request compared to others in the work pool.

Fields Density Default view ▼ Refresh

Rank	ID	Change request	Stage	Created by	Completion date	Status
1						NEEDED
2						NEEDED
0						NEEDED

Rank change request

Review and update the rank for this change request. Rank 1 is the highest priority.

Rank

Cancel Submit

You can also use the drag and drop feature to rank the change requests. For this, left-click in a row and hold the point button while dragging the row up or down.

Change requests	Idea	Plan	Build	Test	Deploy
3	0	3	0	0	0

		Default view	
--	--	--------------	--

Rank	ID	Change request	Stage	Created by	Completion date	Status	
1	OpsCR-2	New action ...	Plan	Business User	9/30/20	DETAILS NEEDED	
2	OpsCR-1	New action...	Plan	Business User	9/30/20		
3	OpsCR-3	Update Rew...	Plan	Business User	9/23/20	DETAILS NEEDED	

Release the pointer once you place the row in the desired position

Change requests	Idea	Plan	Build	Test	Deploy
3	0	3	0	0	0

		Default view	
--	--	--------------	--

Rank	ID	Change request	Stage	Created by	Completion date	Status	
1	OpsCR-2	New action f...	Plan	Business User	9/30/20	DETAILS NEEDED	
3	OpsCR-3	Update Rew...	Plan	Business User	9/23/20	DETAILS NEEDED	
2	OpsCR-1	New action f...	Plan	Business User	9/30/20	DETAILS NEEDED	

At the top of the page, click the **Refresh** icon to refresh the page to see the new rankings

Change requests	
-----------------	--

Search...		Change requests by anyone	All stages	Open	Closed
-----------	--	---------------------------	------------	------	--------

When the page refreshes, the **Rank** field reflects the new rankings.

Change requests	Idea	Plan	Build	Test	Deploy
3	0	3	0	0	0

		Default view	
--	--	--------------	--

Rank	ID	Change request	Stage	Created by	Completion date	Status	
1	OpsCR-2	New action f...	Plan	Business User	9/30/20	DETAILS NEEDED	
2	OpsCR-3	Update Rew...	Plan	Business User	9/23/20	DETAILS NEEDED	
3	OpsCR-1	New action f...	Plan	Business User	9/30/20	DETAILS NEEDED	

Completing the ranking task

It is important that you also open the change request and complete the **Rank change request** task for the change request to proceed to the next stage.

Click **Go** to work on the **Rank change request** task.

OpsCR-2 ☆
New action for bill payment

Edit Actions ▾

Rank 1

Status **DETAILS NEEDED**

Request type Create new action

Completion date September 30, 2020

Business issue Sales

Group CreditCards

Created Business User 1 day ago

Updated Business User 22 hours ago

✓ Idea Plan Build Test Deploy

To do

Rank change request
Rank change request (Plan) • Due 4 days from now • Go ⋮

Pulse

Search X ▾

Post ▾

TL Start a conversation

BU Business User 22 hours ago

Completed task-Define details

Comment Like

In the **Rank** field, provide a numerical value that represents the relative priority of the change request compared to others in the work pool. You may have already assigned a rank.

Click **Submit** to complete the task.

OpsCR-2 ☆
New action for bill payment

Edit Actions ▾

Rank 1

Status **DETAILS NEEDED**

Request type Create new action

Completion date September

✓ Idea Plan Build Test Deploy

Rank change request
Due 4 days from now

Review and update the rank for this change request. Rank 1 is the highest priority.

Rank

1

Cancel Submit

You will notice that:

In the **To do** section, there are new tasks corresponding to the **Build** stage of the change request.

In this case, as this change request is of type **Create new action**, the following tasks are created:

- Configure engagement policy

- Define action details
- Define web treatment

These tasks are intended for next-best-action specialists.

OpsCR-2

New action for bill payment

Actions

Rank

1

Status

IN QUEUE

Request type

Create new action

Completion date

September 30, 2020

Business issue

Sales

Group

CreditCards

Created

Business User
1 day ago

Updated

Team Lead
less than a minute ago

Details

Pulse

Artifacts

✓ Idea

✓ Plan

Build

Test

Deploy

To do

C

Configure engagement policy

Configure engagement policy • Due 5 days from now • Task in New action for bill payment (OpsCA-1)

C

Define action details

Define action details • Due 5 days from now • Task in New action for bill payment (OpsCA-1)

C

Design web treatment

Design web treatment • Due 5 days from now • Task in New action for bill payment (OpsCA-1)

View less

Pulse

Q Search

X

Post

TL

Start a conversation

Business User

22 hours ago

Completed task-Define details

Comment

Like

Prioritizing a change request -- Mon, 12/07/2020 - 06:31

To get the full experience of this content, please visit <https://academy.pegas.com>

Completing the action build tasks

Business scenario

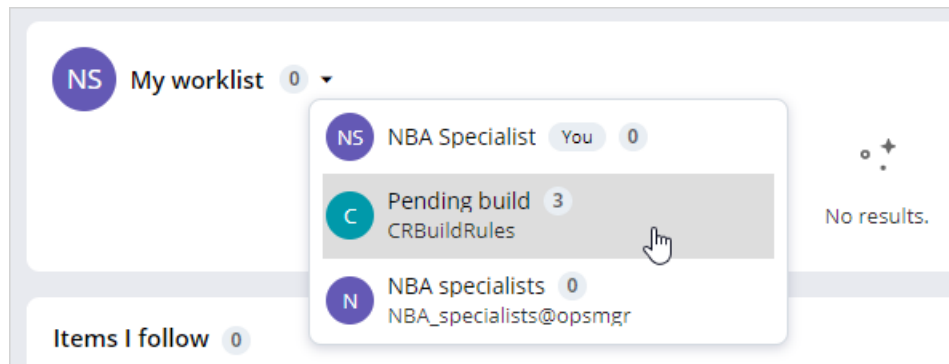
A business user has recently submitted a change request to create a new action to promote the use of credit cards for utility payments. The team lead has assigned a high priority to the change request so you, as a next-best-action specialist, can work on it.

The change request is now in the **Build** stage in its lifecycle. In this stage, as an NBA Specialist, you complete the various build tasks generated by the system. This is the step in which you map the business requirements to specific settings in Pega Customer Decision Hub™ so that the system can auto-generate the relevant artifacts.

Accessing the build tasks

The system generates one or more build tasks depending on the change request type. In this case, the change request is of type **Create a new action**. The business user has defined some engagement policies and requested a new web treatment. So, there are three corresponding tasks to be completed.

As a next-best-action specialist, you can access the build tasks from the **Pending build** work queue on the homepage.



You can also visit the **Change requests** landing page and open the change requests in the **Build** stage that are in the **In queue** status.

Change requests

Change requests by anyone

All stages

Open

Closed

Showing 3 of 3

Change requests

Idea

Plan

Build

Test

Deploy

Group

Fields

Density

Default view

Refresh

Rank	ID	Change request	Stage	Type	Created by	Completion date	Status	
1	OpsCR-2	New action...	Build	Create new	Business User	9/30/20	IN QUEUE	
2	OpsCR-3	Update Re...	Plan	Update exi:	Business User	9/23/20	DETAILS I	
3	OpsCR-1	New action...	Plan	Create new	Business User	9/30/20	DETAILS I	

You can also preview a change request without opening it. This feature is helpful for when you have multiple change requests in the queue, and you want to quickly check the details of the change requests without opening them.

Change requests

Change requests by anyone

All stages

Open

Closed

Showing 3 of 3

Change requests

Idea

Plan

Build

Group

Rank	ID	Change request	Stage	Type
1	OpsCR-2	New action for bi...	Build	Create new action
2	OpsCR-3	Preview	Plan	Update existing a
3	OpsCR-1	New action for b...	Plan	Create new action

OpsCR-2

New action for bill payment

DETAILS

PULSE

MORE

Actions

Rank 1

Status IN QUEUE

Request type Create new action

Completion date September 30, 2020

Business issue Sales

Group CreditCards

Description Promote usage of credit card for utility bill payments

Created Business User 6 days ago

Updated Team Lead 5 days ago

Within a change request, the pending **Build** tasks appear under the **To do** section. Click on the **Go** button to work on a build task. If two next-best-action specialists try to work on the same task, then the system prevents the second person from picking up the task.

OpsCR-2

New action for bill payment

Rank 1

Status **IN QUEUE**

Request type Create new action

Completion date September 30, 2020

Business issue Sales

Group CreditCards

Created Business User 6 days ago

Idea

Plan

Build

Test

Deploy

To do

C

Configure engagement policy

Configure engagement policy • Due 1 hour ago • Task in New action for bill payment (OpsCA-1)

Go

C

Define action details

Define action details • Due 1 hour ago • Task in New action for bill payment (OpsCA-1)

Go

C

Design web treatment

Design web treatment • Due 1 hour ago • Task in New action for bill payment (OpsCA-1)

Go

View all

Defining action details

The **Define action details** task corresponds to defining the basic action attributes.

The fields are prepopulated with values based on the information provided by the business user when creating the change request. However, you can change these values in this build task.

Create action (OpsCA-1)

New action for bill payment

Actions

Rank 1

Status NEW

Change request New action for bill payment

Action Credit card bonus points

Completion date September 30, 2020

Business issue Sales

Group CreditCards

Created Team Lead 5 days ago

Updated Team Lead 5 days ago

Details

Pulse

Availability

Attributes

Engagement policy

Channels

Build

Generate

Define action details

Due 2 hours ago

Name *

Credit card bonus points

Identifier *

Creditcardbonuspoints

Key code

Business issue * ?

Sales

Group * ?

CreditCards

Availability

☒ Make this action available

Start date *

9/30/2020 8:00 PM

End date

Bundle ?

Not a bundle

Priority

☐ Transactional ?

☒ Apply AI to calculate action propensity ?

Business weight (+/-)

%

Business value

Cancel

Submit

The fields correspond to the action attributes in Pega Customer Decision Hub. For example, **Name** is the action name, and **Business issue** and **Group** decide the categorization of the action in the business hierarchy.

Click **Submit** to confirm the values and complete the task

Configuring engagement policy

The **Configure engagement policy** task corresponds to defining an action's engagement policy.

When you open the task, you can also view the existing group-level engagement policy

Create action (OpsCA-1)

New action for bill

Build

Generate

payment

Actions ▾

Rank
1

StatusNEW

Change requestNew action for bill payment

ActionCredit card bonus points

Completion dateSeptember 30, 2020

Business issueSales

GroupCreditCards

CreatedTeam Lead 5 days ago

UpdatedNBA Specialist less than a minute ago

Details

Pulse

Availability

Attributes

Engagement policy

Channels

Configure engagement policy

Due 2 hours ago

Eligibility ?

Inherited fromCreditCards

☒ Apply

Customer actions

- (Customer: isCustomer is true
- and Customer: Age is greater than 18)

Action eligibility has not been defined.

Add criteria

Applicability ?

Inherited fromCreditCards

☒ Apply

Customer actions

- (Customer: Has Cards is equal to N)

Action applicability has not been defined.

Add criteria

Suitability ?

+

Contact policy ?

Inherited fromCreditCards

All actions

Group contact policy has not been defined.

Customer actions

- > 7-day action impressions: Track Impressions for the action over the past 7 days
- > 7-day group clicks: Track Clicks for all actions in the group over the past 7 days

Cancel

Submit

Define the appropriate engagement policy requested by the business user. On the left, click on **Engagement policy** to view the details provided by the business user.

Updated

NBA Specialist less than a minute ago

Details

Pulse

Availability

Attributes

Engagement policy

Channels

Engagement policy

eligibility

"customer owns a card"

Applicability

No changes requested

Suitability

No changes requested

Contact policy

"hide if offer already accepted"

In this case, you need to add an eligibility rule and a contact policy.

Click **Add criteria** to add action-level eligibility criteria.


Eligibility ?

Inherited from CreditCards

☒ Apply

Customer actions


- (Customer: isCustomer is true
- and Customer: Age is greater than 18)



Action eligibility has not been defined.

Add criteria

Use the condition builder to define the criteria


Eligibility 


Inherited from CreditCards


☒ Apply


Customer actions


(Customer: isCustomer is true
and Customer: Age is greater than 18)

and 


Group ANDs 



Customer 

Has Cards 


is equal to 


Y



To add a contact policy, in the **Contact policy** section, click the **Gear** icon to access the contact policy library.

Contact policy 



Inherited from CreditCards

All actions

Group contact policy has not been defined.

Customer actions

> 7-day action impressions: Track Impressions for the action over the past 7 days

> 7-day group clicks: Track Clicks for all actions in the group over the past 7 days

Select the appropriate policy, then click **Submit**.

Contact policy card library

Q

Search...

Clear filter

↻

Refresh

Select...	Name	Suppressions
<input type="checkbox"/>	7-day action impressions	If there are 100 Impressions for Web treatments, suppress the action for 10 days
<input type="checkbox"/>	7-day group clicks	If there are 20 Clicks for Web treatments, suppress the action for 10 days
<input checked="" type="checkbox"/>	30-day action accepts	If there are 1 Accepts for Any treatments, suppress the action for 60 days

Cancel

Submit

The policy is added to the action.

Contact policy ?

Inherited from CreditCards

All actions

Group contact policy has not been defined.

Customer actions

> 7-day action impressions: Track Impressions for the action over the past 7 days

> 7-day group clicks: Track Clicks for all actions in the group over the past 7 days

> 30-day action accepts: Track Accepts for the action over the past 30 days

Cancel

Submit

Finally, click **Submit** to complete the task.

Designing a web treatment

The **Design web treatment** task corresponds to designing a new web treatment for the action.

The displayed attributes correspond to the web treatment attributes in Pega Customer Decision Hub

Create action (OpsCA-1)
New action for bill payment

Actions ▾

Rank
1

Status
NEW

Change request
New action for bill payment

Action
Credit card bonus points

Completion date
September 30, 2020

Business issue
Sales

Group
CreditCards

Created
Team Lead 5 days ago

Updated
NBA Specialist about a minute ago

Details

Pulse

Availability

Attributes

Engagement policy

Channels

BuildGenerate

C

Design web treatment

Due 3 hours ago

Name *
Credit card bonus points tile

Identifier *
Creditcardbonuspointstile

Content URL

Insert URL or select from [Asset library](#)

Click-through URL

Placement type
Tile

Language
English (United States)

Format

☐ HTML fragment

☐ Image

☒ Make this treatment available

Availability start date *
9/30/2020

End date

CancelSubmit

Channels

Web

Creditcardbonuspointstile

Placement type
Tile

Description
Credit card bonus points tile

Start date
Sep 30, 2020 at 12:00 AM

End date
--

Enter the values as requested by the business user. On the left, click **Channels** to view the channel-related details provided by the business user.

Click **Submit** to complete the task.

C

Design web treatment
Due 3 hours ago

Name *

Credit card bonus points tile

Identifier *

Creditcardbonuspointstile

Content URL

https://artifacts.pegaenablement.com/images/BonusPointsSM.png

Insert URL or select from

Asset library

Click-through URL

https://3.126.209.245/uplus-wss/retail_bank/category.html

Placement type

Tile

Language

English (United States)

Format

☐ HTML fragment

☒ Image

☒ Make this treatment available

Availability start date *

9/30/2020

End date

Cancel

Submit

When all build tasks are completed, the status of the change request changes to **Resolved-Completed**, and the **Pulse** is updated with the appropriate status.

The system automatically generates the corresponding artifacts such as actions and treatments in Pega Customer Decision Hub.

Create action (OpsCA-1) ☆

New action for bill payment

Actions ▾

Rank 1

Status **RESOLVED-COMPLETED**

Change request New action for bill payment

Action Credit card bonus points

Completion date September 30, 2020

Business issue Sales

Group CreditCards

Created Team Lead 5 days ago

Updated NBA Specialist less than a minute ago

Resolved NBA Specialist less than a minute ago

Details

Pulse

Build

Generate

Pulse

Post ▾

NS Start a conversation

NS NBA Specialist 15 minutes ago

Completed task-Configure engagement policy

Comment Like

NS NBA Specialist 1 hour ago

Completed task-Define action details

Comment Like

The next step for you, as a next-best-action specialist, is to verify these artifacts

OpsCR-2 ☆

New action for bill payment

Actions ▾

Rank 1

Status **PENDING TESTING**

Request type Create new action

Action Credit card bonus points

Completion date September 30, 2020

Business issue Sales

Group CreditCards

Created Business User 6 days ago

Updated System 5 minutes ago

Details

Idea

Plan

Build

Test

Deploy

To do

C Validate artifacts

Extension for test stage • Due 4 days from now •

Go

Details

Description

Promote usage of credit card for utility bill payments

Change request details

Created on Sep 10, 2020 at 08:09:21 AM

Created by Business User

Updated on Sep 16, 2020 at 11:54:54 AM

Updated by System

Action to create

Credit card bonus points

Availability

Status Inactive

Start date Sep 30, 2020 at 12:00 AM

End date --

Completing the action build tasks -- Mon, 12/07/2020 - 06:32

To get the full experience of this content, please visit <https://academy.pega.com>

Validating the next-best-action artifacts

Business scenario

A business user requests a new action to promote the usage of credit cards for making utility payments. As an NBA Specialist, you have just completed the build tasks associated with that change request.

When you completed the build tasks, the system automatically generated the corresponding artifacts such as actions and treatments in Pega Customer Decision Hub. However, these artifacts are still in the business operations environment, in an area that is accessible only to you and your business operations team. They are not in a production environment yet.

The next step is for you, as an NBA Specialist, to verify these artifacts to ensure that they match the business requirements.

Validating the artefacts

When you open the change request, in the **To do** section, the task **Validate artifacts** is available for you to work on.

The screenshot displays the Pega Customer Decision Hub interface for a change request titled "New action for bill payment". The interface is divided into several sections:

- Top Navigation Bar:** Shows the current stage as "Test" in a sequence of Idea, Plan, Build, Test, and Deploy. Each stage has a checkmark indicating completion.
- Left Sidebar:** Contains a table of attributes for the change request.

Rank	1
Status	PENDING TESTING
Request type	Create new action
Action	Credit card bonus points
Completion date	September 30, 2020
Business issue	Sales
Group	CreditCards
Created	Business User 6 days ago
Updated	System 5 minutes ago
- Main Content Area:**
 - To do:** A task card titled "Validate artifacts" with a subtext "Extension for test stage • Due 4 days from now •" and a "Go" button.
 - Details:**
 - Description:** Promote usage of credit card for utility bill payments
 - Change request details:**
 - Created on: Sep 10, 2020 at 08:09:21 AM
 - Created by: Business User
 - Updated on: Sep 16, 2020 at 11:54:54 AM
 - Updated by: System
 - Action to create:** Credit card bonus points
 - Availability:**
 - Status: Inactive
 - Start date: Sep 30, 2020 at 12:00 AM
 - End date: --

To validate the generated artifacts, click the link under **Action to create** (in this case **Credit card bonus points**). The details of the generated action and its related artifacts are displayed on the right.

You can validate the action attributes.

✓

Idea

✓

Plan

✓

Build

✕

←

✕

←

📁

Action

Credit card bonus points

ATTRIBUTES

TREATMENTS

ENGAGEMENT...

✓

To do

C

Validate artifacts

Extension for test stage • Due 4 days from now •

Details

Description

Promote usage of credit card for utility bill payments

Change request details

Created on

Sep 10, 2020 at 08:09:21 AM

Created by

Business User

Updated on

Sep 16, 2020 at 11:54:54 AM

Updated by

System

Action to create

Credit card bonus points

Availability

Status

Inactive

Start date

Sep 30, 2020 at 12:00 AM

End date

--

Bundle

Not a bundle

Priority

Apply AI to calculate action propensity

Yes

Status

NOT ACTIVE

Business issue

Sales

Group

CreditCards

Name

Creditcardbonuspoints

Updated by

NBA Specialist

Updated on

Sep 16, 2020 at 11:54 AM

Availability

Start date

Sep 30, 2020 at 08:00 PM

End date

--

Field marketing

--

Bundle

Not a bundle

Attributes

Key code

--

Arbitration

?

Transactional

false

Action propensity true

Priority adjustment

?

Business weight

--

Business value

--

Click **Treatments** to access the generated treatments.

✕

←

📁

Action

Credit card bonus points

ATTRIBUTES

TREATMENTS

ENGAGEMENT...


Credit card bonus points tile

Web

Validate the web treatment.

✕

←



Treatment
Creditcardbonuspointstile

Web treatment

Status

INACTIVE

Description

Credit card bonus points tile

Start date

Sep 30, 2020 at 12:00 AM

End date

--

Placement type

Tile

Dimensions

x

Language


English (United States)

Content URL



<https://artifacts.pegaenablement.com/images/BonusPoints>


Click-through URL

https://env-3a126b209c245.pegaenablement.com/uplus-wss/retail_bank/category.html



Validate the action-level engagement policy.



Action
Credit card bonus points

ATTRIBUTES TREATMENTS **ENGAGEMENT ...**

Context	Customer
Intended recipient	--

Eligibility

Top-level	None
Group-level	(Customer: isCustomer is true and Customer: Age is greater than Customer: 18)
Action-level	(Customer: Has Cards is equal to Y)

Applicability

Top-level	None
Group-level	(Customer: Has Cards is equal to Customer: N)
Action-level	None

Suitability

Top-level	None
Group-level	None
Action-level	None

Contact policy

Top-level	None
Group-level	<div> > 7-day action impressions: Track Impressions for the action over the past 7 days </div> <div> > 7-day group clicks: Track Clicks for all actions in the group over the past 7 days </div>
Action-level	<div> > 30-day action accepts: Track Accepts for the action </div>

Completing the validation task

After validating the artifacts, you can complete the **Validate artifacts** task. Click **Go** to proceed.

✓ Idea

✓ Plan

✓ Build

Test

Deploy

To do

C

Validate artifacts
Extension for test stage • Due 4 days from now •

Go

The message advises you to log in to the Pega Customer Decision Hub portal and validate the artifacts, but you have already done that from within the Pega 1:1 Operations Manager, so you can ignore the message. Click **Submit** to complete the task.

Alternatively, if you would like to change any attributes of the newly created artifacts, you can click **Return to build** to change the values, and then regenerate the artifacts.

C

Validate artifacts
Due 4 days from now

Login to Customer Decision Hub and validate the artifacts generated for this change request to ensure it meets the business expectations.

Once testing is complete, return to this task and click Submit.
If there are issues you have the option to Return to Build.

Cancel

Return to build

Submit

The change request now moves to the Deploy stage. The next task is for the team lead to promote this change request to the revision manager, who can then deploy the business changes to the production environment.

OpsCR-2
New action for bill payment

To do

- Complete this change request**
 Promote to revision manager (Deploy) • Due 5 days from now

Pulse

Post

Start a conversation

NBA Specialist
 19 hours ago
 Completed task-Design web treatment

Comment
 Like

NBA Specialist
 19 hours ago
 Completed task-Configure engagement policy

Comment
 Like

NBA Specialist
 20 hours ago
 Completed task-Define action details

Comment
 Like

Validating the next-best-action artifacts -- Mon, 12/07/2020 - 06:32
To get the full experience of this content, please visit <https://academy.pega.com>

Deploying changes to production

Business scenario

A business user requests a new action to promote the usage of credit cards for utility payments. A next-best-action specialist has completed all the build tasks and validated the generated artifacts, such as actions and treatments. Right now, the artifacts are present in the business operations environment.

The next step is for you, as a team lead, to promote the change request to the revision manager, who then deploys the business changes to the production environment.

Promoting changes for deployment

As a team lead, when you open the change request, in the **To do** section, the task **Complete this change request** is available for you to work on.

Click **Go** to proceed.

The screenshot displays the OpsCR-2 interface. At the top, a blue header bar contains the 'OpsCR-2' logo, a dropdown arrow, and a star icon. Below the header, the main title 'New action for bill payment' is visible. The interface is divided into two main sections: a left sidebar and a right main content area.

Left Sidebar:

- Actions:** A dropdown menu.
- Rank 1:** A section header.
- Status:** A purple box labeled 'DEPLOYMENT READY'.
- Request type:** Create new action.
- Action:** Credit card bonus points.
- Completion date:** September 30, 2020.
- Business issue:** Sales.
- Group:** CreditCards.
- Created:** Business User 6 days ago.
- Updated:** NBA Specialist 21 minutes ago.

Right Main Content Area:

- Progress Bar:** A horizontal bar with five steps: Idea (checked), Plan (checked), Build (checked), Test (checked), and Deploy (active).
- To do:** A section containing a task card for 'Complete this change request'. The card includes a teal circle with a 'C', the task name, a description 'Promote to revision manager (Deploy) • Due 5 days from now', a blue 'Go' button, and a three-dot menu icon.
- Details:** A section with the following information:
 - Description:** Promote usage of credit card for utility bill payments.
 - Change request details:**
 - Created on:** Sep 10, 2020 at 08:09:21 AM
 - Created by:** Business User
 - Updated on:** Sep 17, 2020 at 07:17:09 AM
 - Action to create:** Credit card bonus points.
 - Availability:**

The list of artifacts generated by the system is displayed. Review the list and click **Approve** to complete the task and the change request.

✓

Idea

✓

Plan

✓

Build

✓

Test

Deploy

C

Complete this change request

Due 4 days from now

Review the list of created or updated artifacts. If correct, click approve to complete this change request. You may also reject this change request if necessary.

Rule name	Rule type	Operation	Completed by
Creditcardbonuspointstile	Web treatment	Generated new	NBA Specialist
Creditcardbonuspoints	Action rule	Generated new	NBA Specialist
NBA_Sales_CreditCards_E_Customer	Proposition filter	Updated	NBA Specialist

Cancel

Approve

You may also reject the change request so the NBA Specialist can make changes and re-generate the artifacts

Cancel

Approve

Reject and discard changes

Once you approve the change request, it moves to the **Resolved-Completed** state.

All the tasks necessary to make the business change, from the perspective of the business operations team, is complete. The change request is now promoted to the revision manager, who deploys the changes to the production environment.

OpsCR-2
New action for bill payment

Actions ▾	
Rank	---
Status	RESOLVED-COMPLETED
Request type	Create new action
Action	Credit card bonus points
Completion date	September 30, 2020
Business issue	Sales
Group	CreditCards
Created	Business User 7 days ago
Updated	Team Lead less than a minute ago
Resolved	Team Lead less than a minute ago

Pulse

- Post**
 - Start a conversation**
- Team Lead**
less than a minute ago
Completed task-Promote to revision manager
[Comment](#) [Like](#)
- NBA Specialist**
1 hour 25 mins ago
Completed task- Testing
[Comment](#) [Like](#)
- NBA Specialist**
20 hours ago
Completed task-Design web treatment
[Comment](#) [Like](#)
- NBA Specialist**
21 hours ago
Completed task-Configure engagement policy
[Comment](#) [Like](#)

Deploying changes to production -- Mon, 12/07/2020 - 06:32
To get the full experience of this content, please visit <https://academy.pega.com>