



Business Agility in 1:1 Customer Engagement

STUDENT GUIDE

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Business agility in 1:1 customer engagement overview

Description

Learn the processes involved in creating a new action in a business operations environment and propagate the changes to the production environment.

Learning Objectives

After completing this module, you should be able to:

- Describe business agility and its importance in one-to-one customer engagement
- Distinguish between business-as-usual and enterprise changes
- Describe the steps involved in managing business changes in one-to-one customer engagement

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. 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 vs 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

Change management process

Introduction

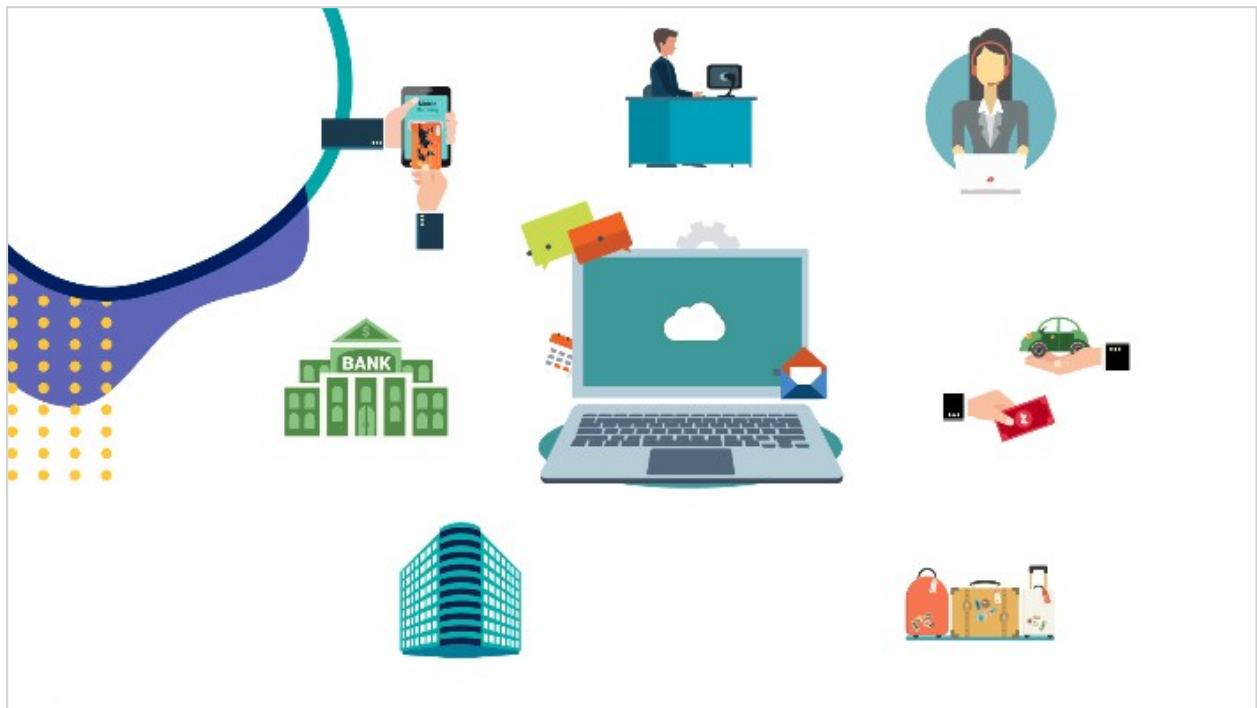
When business requirements change rapidly, the software development process needs to be more agile, while still producing high-quality, reliable software. This topic covers the importance of the change management process, and how it works in a one-to-one customer engagement project for Pega Cloud® customers.

Transcript

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

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.

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™.



- A development environment is one in which developers create new versions of the application by adding enhancements or fixing issues. It is referred to as a system of record (SOR) for Pega applications.
- A staging environment is used for various testing such as functional testing, unit testing, and user acceptance testing.
- The business operations environment (BOE) 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 the next best actions to external channels, collects customer responses, and is 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 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.

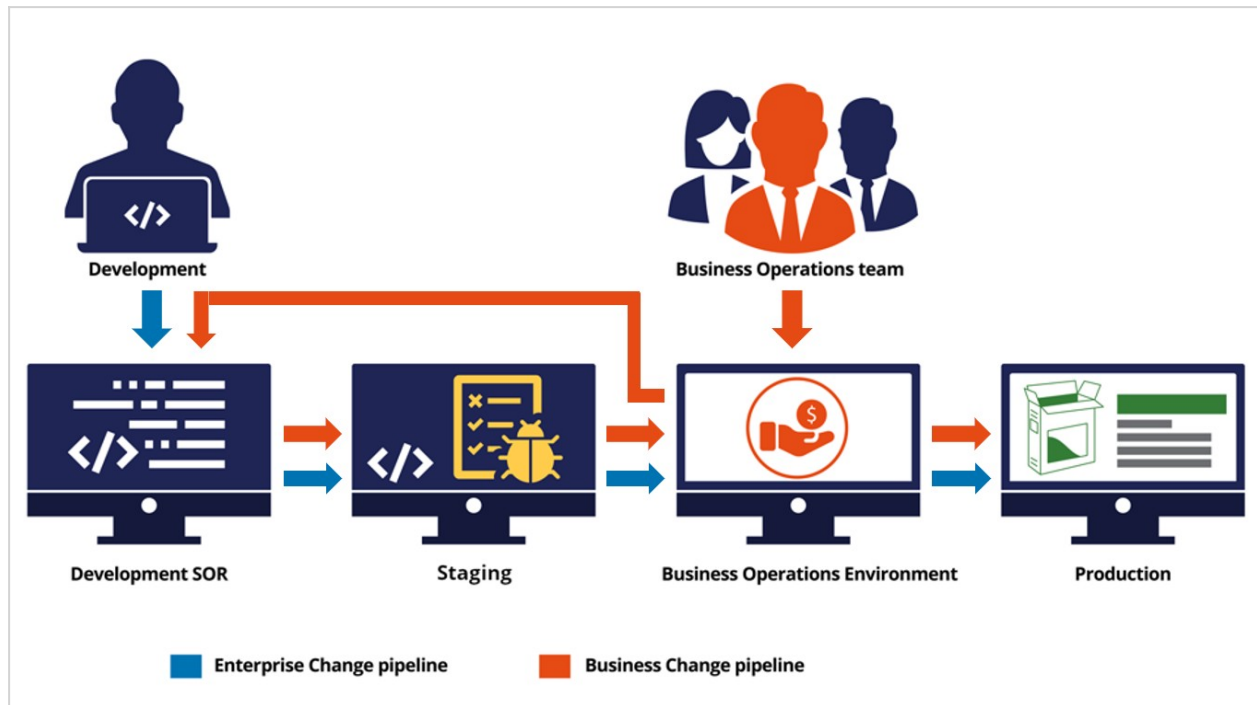
Developers make these changes in the development environment. Changes to the application are pushed to other environments through the enterprise-change pipeline managed by the Pega Deployment Manager™.

Examples of business changes include 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. Business changes are made by the business operations team in the business operations environment.

The business content team uses the 1:1 Operations Manager portal to initiate changes in the business operations environment.

In the BOE, the changes are carried out in an application overlay. The application overlay defines the scope in which business users can change the application (for example, by modifying actions, treatments, decision strategies, and so on) to accommodate the constantly changing business conditions and requirements.

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



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.

Pega 1:1 Operations Manager overview

Description

Learn how Pega 1:1 Operations Manager helps streamline the change management processes that affect one-to-one customer engagement orchestrated by Pega Customer Decision Hub™.

Learning Objectives

After completing this module, you should be able to:

- Explain the lifecycle of a change request
- List of the types of change requests
- Describe the various personas involved in the change management process

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:





Ben Stokes

Digital marketing manager
(Personal loan division)

U+ Bank

www.uplusbank.com



Robert Hill

Digital marketing manager
(Owned media-web/mobile)

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

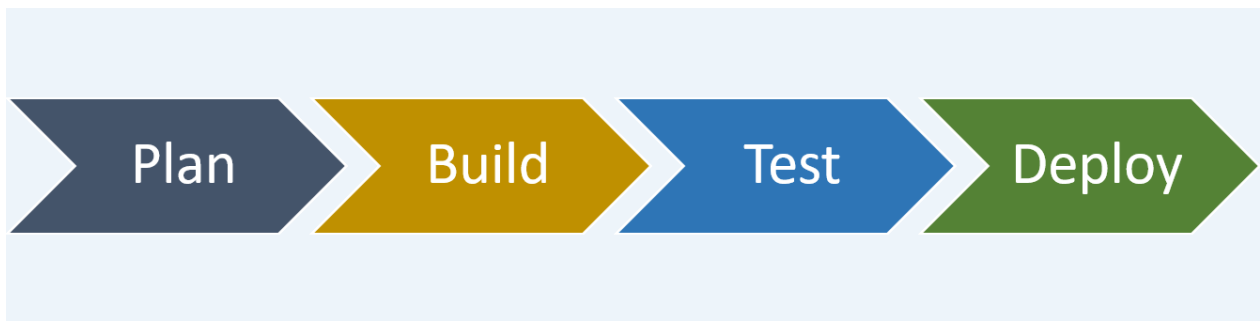
You can scale up operations by adding more team members to this group.

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.

Change request types

Introduction

Business requirements change rapidly and typically have a different release cycle compared to the enterprise release cycle.

To ensure logical separation between technical and non-technical changes in change management, business changes or non-technical changes are made in the Business Operations Environment (BOE), according to business requirements.

You can make two types of business changes to your Customer Decision Hub application from the BOE:

- High-volume day-to-day business changes, such as creating new actions and treatments, and updating existing action and treatment details.
- Low-volume changes such as changes to taxonomy, arbitration, and group-level contact policies.

As a business user, you create a change request to initiate the change management process in 1:1 Operations Manager to make business-as-usual changes to the Pega Customer Decision Hub.

Three types of change requests are 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.



New operations change request — ×



Name *
Promote new card on web - Cashback 5%

Select type *
 Create new action
 Update existing action
 Other


Completion date *
8/24/2022 



Are you making this change to fix a production defect? 
 Yes No

Business issue 
Grow 

Group 
Credit cards 

Description
Create new leads from web channel fro new Cashback 5% credit card
Remaining: 935 characters

Attach files
Filename 

Update existing action

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

New operations change request

Name *
Extend sign-up bonus period - Cashback 5%

Select type *
 Create new action
 Update existing action
 Other

Completion date *
8/24/2022

Are you making this change to fix a production defect? ?
 Yes No

Business issue ?
Grow

Group ?
Credit cards

Description
Extend sign up bonus period by 4 weeks on the Cashback 5% card
Remaining: 937 characters

Attach files
Filename

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 Other

If the change request is neither creating a new action nor updating an existing action, then you can select the **Other** category. This case type is best suited to making changes that are not related to a single action, such as editing engagement policies, changing arbitration rules, and so on.

New operations change request

Name *

Select type *

Create new action

Update existing action

Other

Completion date *

Are you making this change to fix a production defect? ?

Yes No

Business issue ?

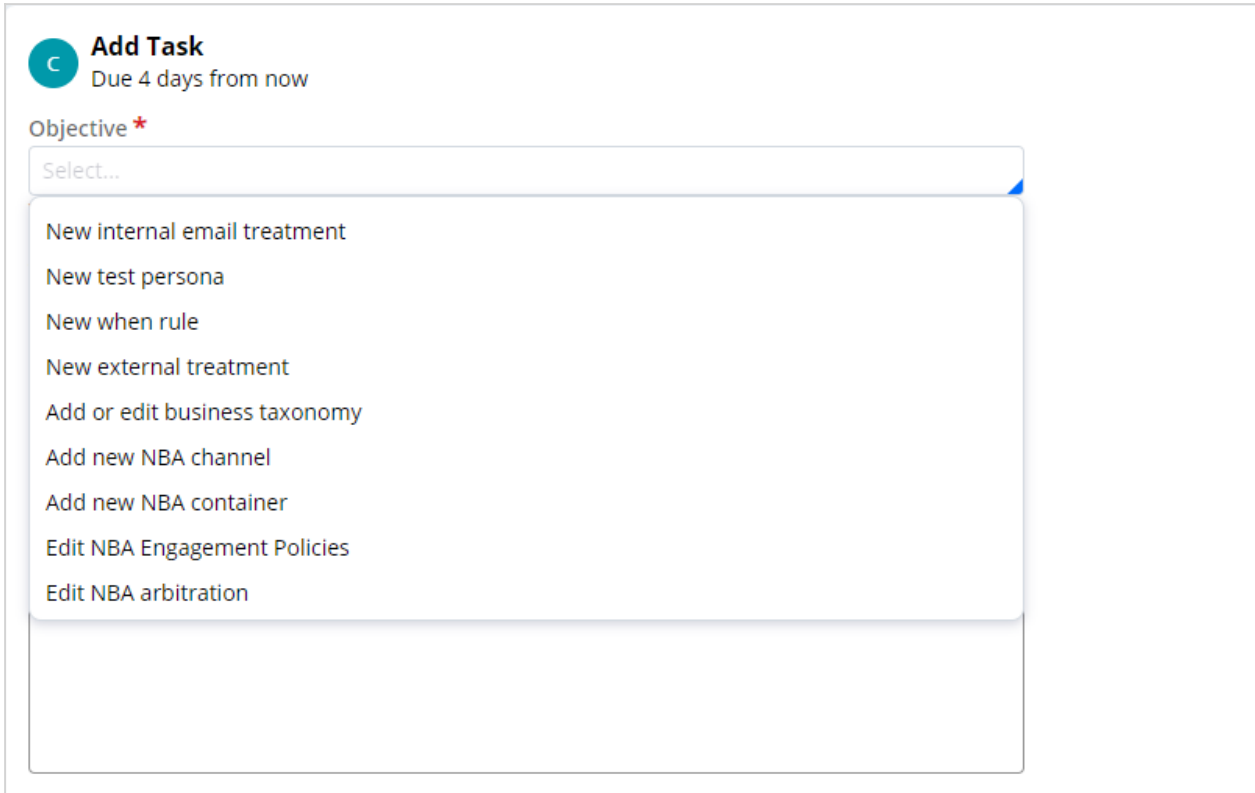
Group ?

Description

Remaining: 918 characters

Attach files

A change request with **Other** as its category is assigned to a team lead, who then adds one or more tasks from the predefined list of objectives according to the business requirement. These tasks are typically assigned to an NBA designer.



The screenshot shows a form titled "Add Task" with a teal circular icon containing a white letter 'C'. Below the title, it says "Due 4 days from now". The form has a field labeled "Objective *" with a red asterisk. A dropdown menu is open, showing a list of objectives: "New internal email treatment", "New test persona", "New when rule", "New external treatment", "Add or edit business taxonomy", "Add new NBA channel", "Add new NBA container", "Edit NBA Engagement Policies", and "Edit NBA arbitration".

Revision Management


If the required business change is beyond the scope of the three change request types, such as edit a strategy, or edit a scorecard, then the team lead initiates the change by creating a new revision in the revision management section of the 1:1 Operations Manager.

Create Revision ✕

New Overlay standard release CDH

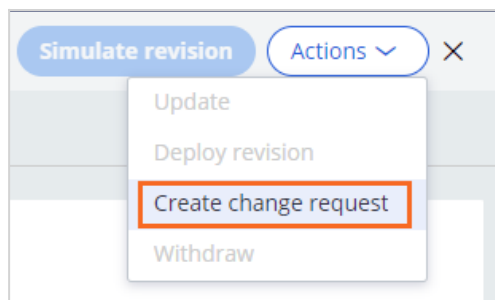
Choose the closing date for this revision

Due by *

9/1/2022 

Cancel Submit

Then, in the Customer Decision Hub portal, the team lead creates a change request within the revision created in the 1:1 Operations Manager. The team lead includes all rules that are required to carry out the change and typically assigns the change request to an NBA designer.



Launching a new offer on web

Description

Learn the processes involved in creating a new action in a business operations environment and propagate the changes to the production environment.

Learning Objectives

After completing this module, you should be able to:

- Submit a request for a new action
- Manage change request priorities
- Build the action with the appropriate details
- Move the changes to the production environment

Submitting a request for a new action

Introduction

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™ by using a safe and guided process, test the changes, and conduct simulations before pushing the changes to the production environment.

Transcript

This video explains how to submit a change request in 1:1 Operations Manager.

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

The bank wants to introduce a new cashback offer of 5% to the customers who make bill payments with the credit card.

Business users and next-best-action specialists use Pega 1:1 Operations Manager to work collaboratively in a business operations environment.

A business user first creates a change request in Pega 1:1 Operations Manager to initiate adding a new action. 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 of the request.

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

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

Select the appropriate **Business issue** and **Group** if you know it. You can also provide this later.

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

Create the new change request. The new change request has a unique ID.

The change request is currently in the **Plan** stage.

Observe that the first task to be completed is **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 work on it later.

In the **Define attributes** section, enter a name for the new action. In this case, the `Cashback 5 card`.

The **Business Issue** and **Group** are already populated if the details are given when creating the request. These details can be changed later in collaboration with the next-best-action specialist.

Continue to define the availability.

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

Continue to define the engagement policy.

In the **Define engagement policy** section, you have four categories to define the criteria.

Eligibility rules are rules that qualify a customer for an action. For example, the Bonus points offer can require that the customer owns a card.

Applicability rules are factors that determine if an action is appropriate at this point for this customer. For example, the customer used to pay utilities with a credit card but no longer does.

Suitability rules are conditions that determine if an action is deemed appropriate and is in the best interest of the customer. For example, the customer is not in collections.

Contact policy conditions help avoid customer fatigue through over-communication. For example, hide if an offer is already accepted.

In this case, you add an eligibility rule: `Average spent on card less than 3000`. and contact policy condition `Hide if offer already accepted`. Note the business user is defining in business language what the requirements are. The NBA Specialist is responsible for implementing these requirements.

Continue to define the channels.

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

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). In this case, a tile.

Finish the task.

Notice that there is a new task in the **To do** section: **Rank change request**. As a business user, you are unable to work on these tasks as are intended for a team lead.

You have reached the end of this video. What did it show you?

- How to submit a change request in 1:1 Operations Manager as a business user.

Prioritizing change requests

Introduction

Prioritizing the available change requests helps the NBA Specialists to plan their day and work on the most important tasks first.

Transcript

This video explains how to prioritize a change request and submit it to the next-best-action specialist (or, NBA Specialist) in 1:1 Operations Manager.

A business user submits a change request to create a new action intended to promote using credit cards for utility bill payments. The business user has provided details for the action attributes by specifying all the details for the new action.

As a team lead, you are responsible for two tasks in the **Plan** stage.

The first task is to prioritize the available change requests so that the NBA Specialists can plan their day and work on the most important tasks first.

The second task is to assign peer reviewers to verify the engagement policy defined in the **Build** stage.

You must first rank the change request.

By default, the rank of a new change request is 0. In the **Rank** field, provide a numerical value that represents the relative priority of the change request compared to others in the work pool.

Proceed to the next task.

Now assign a peer reviewer. A peer reviewer can be any operator who can verify the change request details given by the business user against the configuration made by the NBA Specialist. In this case, the peer reviewer is the business user.

Complete the task.

Notice that there are new tasks that correspond to the **Build** stage of the change request in the **To do** section.

In this case, because the change request is a **Create new action** type, the following tasks are created: Define action details, Configure engagement policy, and Define web treatment.

The NBA Specialists are responsible for the tasks.

You have reached the end of this video. What did it show you?

- How to prioritize a change request and assign a peer reviewer to the request as a team lead.

Completing the action build tasks

The build stage is where an NBA Specialist completes the various build tasks generated by the system to create an action. 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.

Transcript

This video shows you how to complete the action build tasks in 1:1 Operations Manager as a next-best-action specialist, or, NBA Specialist.

A business user has recently submitted a change request to create a new action to promote credit cards for utility payments. The team lead has assigned a high priority to the change request so that you can work on it as an NBA specialist.

As an NBA Specialist, you can access the change request that is in the queue on the **Change requests** landing page. Open the request.

As an NBA Specialist, you have various build tasks to complete that the system generated to implement the business requirements that the business user defined. In this case, you have three tasks.

You need to assign any task to yourself before beginning work so that the system prevents a second person from picking up the same task.

The **Define action details** task corresponds to defining the basic action attributes. Assign the task to yourself and continue.

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

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.

Ensure that the **Availability** check box is selected and the **Start date** field is complete. The time that you select reflects when you want this offer to become available.

Set the date and time from which the offer should be available.

Complete the task.

The **To do** list now has just two tasks remaining.

The next task is to define the engagement policy of the action. Assign the task to yourself.

On the **Engagement policy** tab of the task pane, you can view the engagement policy and the contact policy that the business user defined per the business requirement.

In this case, the eligibility rule to define as **Average spent is less than 3000**, and the contact policy is **Hide if offer already accepted**. Open the task to define the rules.

Start by implementing the first eligibility rule.

To implement the second requirement, **Hide if offer already accepted** , configure the contact policies.

Select a contact policy that is already created. An NBA Specialist created this policy in the Customer Decision Hub portal.

Continue the task.

The next step is to verify if the engagement policy is correct.

In this case, Barbara is supposed to receive the **Cashback 5 card** action, as her average spent is less than 3000, the defined eligibility value.

Run the validation and continue.

Add a relevant comment and sent the task for peer review.

The last task is to design a web treatment for the action.

Enter the respective details.

Run the validation and complete the task.

The change request creation is now completed. Because the team lead assigned a peer reviewer to this change request, you now need to send it to the reviewer. In this case, the reviewer is the business user.

Once the business user reviews and approves the change request, you need to review all the tasks and resolve the change request as an NBA Specialist.

When all **Build** tasks are complete, refresh the change request page.

Finally, validate and approve all the artifacts.

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

Now, as the team lead, open the change request to verify it.

Approve the change request to promote it to the **Deployment** stage.

You have reached the end of this video. What did it show you?

- How to complete the action build tasks in 1:1 Operations Manager as an NBA specialist.
- How to review a task as a business user.
- How to, as a team lead, validate tasks that the NBA Specialists developed.

Deploying changes to production

In this stage you push the changes made by the business operations team to the pipeline for deployment.

Transcript

This video shows you how to deploy changes that are made in the business operations environment to the production environment.

To create a new action that promotes credit cards use for utility payments, a next-best-action specialist, or NBA Specialist, has completed all the **Build** tasks and validated the generated artifacts, such as actions and treatments.

Then, the team lead promoted the change request to the revision manager to further push the change request to deployment.

As a revision manager, you need to push the changes made by the business operations team to the pipeline for deployment. Access the change request by clicking **Revision Management** in the navigation pane.

You can see the change request in this revision. Now, push the request to deployment.

Observe that the revision changes are first queued and then get merged to the deployment pipeline. Note that this process might take a while to load.

This pipeline enables a seamless experience to merge changes to the development system of record, version the application, and generate a release artifact.

Deployment Manager then deploys the artifacts to the production environment.

In the production environment, you can select a subset of users to test the modifications in a production environment, and then roll out the changes to all users when the test results are acceptable. In this case, you activate the change request right away.

Complete the revision.

You have reached the end of this video. What did it show you?

- How to deploy changes made in the business operations environment to the production environment.

Update existing actions

Description

Pega 1:1 Operations Manager currently supports three types of change requests. Choosing the right change request category initiates the appropriate change management process flow. In this module, you learn about the change management process to update existing actions.

Learning objectives

After completing this module, you should be able to:

- Update existing actions using 1:1 Operations Manager.

Update existing actions

Introduction

In 1:1 Operations Manager, there are three types of change requests currently supported. Selecting the right change request category initiates the appropriate change management process flow. In this topic, you will learn the change management process of updating existing actions.

Transcript

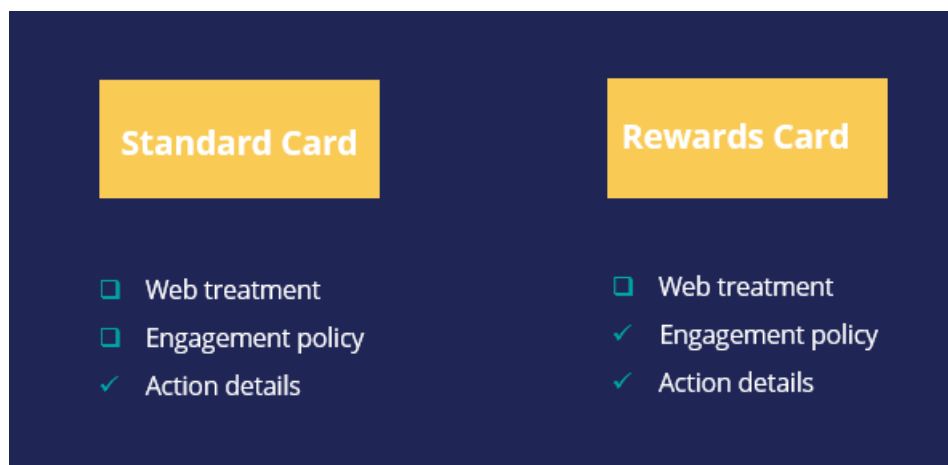
This video explains the concept of updating existing actions by using Pega 1:1 Operations Manager™.

In 1:1 Operation Manager, there are three types of change requests that are currently supported. Selecting the correct change request category initiates the proper change management process flow.

In this topic, you learn how to update existing actions in 1:1 Operations Manager.

You can request one or more changes at the action level when updating an existing action. The available tasks let you add a new or remove or edit an existing treatment, modify the action-level engagement policy, and modify the action details. You can update an action with any of the updated action tasks based on their requirement.

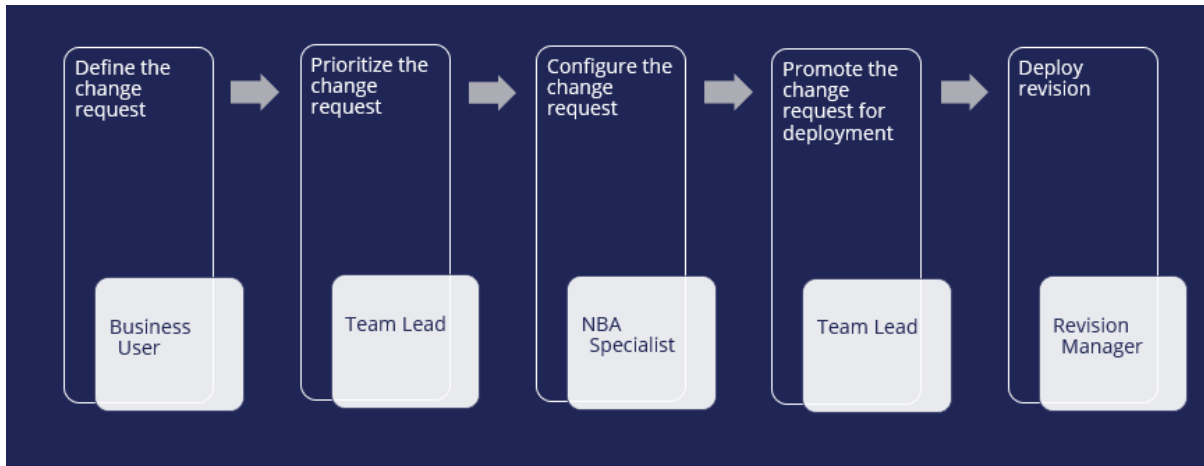
For example, if the two credit card actions you want to update are Standard Card and Rewards Card, you can modify only the action details for the Standard card, and you can modify the engagement policy and action details for the Rewards card action.



Any change that a business user initiates goes through the change management process flow that majorly involves four roles and five different steps.

1. The business user starts the process by defining the change request.

2. Then, the team lead prioritizes the change requests that are received.
3. The NBA Specialist then configures the change request and submits it back to the team lead.
4. The team lead promotes the change request for deployment.
5. And finally, the revision manager deploys the revision.



As a business user, you define the change request for the NBA Specialist to understand the changes to make.

In this step, you can choose the actions that you want to update and select the tasks that you want to modify to those actions.

Notice that multiple actions can be modified as part of one change request, and each action can have its own set of changes. For example, while updating Action 1, you can change only the Engagement policy, while for Action 2 you can change the Web treatment and Engagement policy.

In the change management process flow, the second step is to prioritize the change request created by the business user. In this stage, the team lead can also assign a peer reviewer to review the engagement policies created. However, this task is optional.

Once the change request is assigned a rank, a team of NBA Specialists gets to work on that change request. As an NBA Specialist, you can see all the tasks related to all the actions of the change request once you start working on it. You can start working on them by assigning any of the tasks to yourself.

In 1:1 Operations Manager, while updating a group of actions, modifying the configuration of each action is an independent process. As an NBA Specialist, once you assign a task related to one action to yourself, you can see only the tasks related to that action. You need

to verify the artifacts and then complete configuring all the tasks related to that action before you work on the next action of that change request.

Finally, once you complete all the tasks of that change request, you validate all the artifacts configured and submit the change request back to the team lead.

In the process of change management flow, the next step as a team lead is to verify the change request configured by the NBA Specialist and approve it.

Once approved, the changes are made available or submitted to the revision manager, who can deploy the changes to production.

As a revision manager, you can also activate this revision first to some or all the operators to test it and then finally complete the revision.

This video has concluded. What did it show you?

- How to update existing actions using 1:1 Operations Manager.

Implementing a business change using Revision Management

Description

Business requirements change rapidly and typically have a different release cycle than the enterprise release cycle.

Change request types in the 1:1 Operations Manager portal support most business changes. However, for some low-volume business changes, such as changing decision strategies and editing decision data rules, you use the revision management capabilities in Pega Customer Decision Hub.

Learn how to make such low-volume business changes in the BOE environment and deploy them to production.

Learning objectives

- Initiate a change request for low-volume business change in the BOE.
- Implement the change request as an NBA Designer.
- Approve and deploy the changes to all environments using the business change pipeline.

Modifying a decision strategy

Business requirements change rapidly and typically have a different release cycle than the enterprise release cycle.

To implement any business change, you create a change request in 1:1 Operations Manager. Such changes include creating and modifying actions, treatments, group-level eligibilities and so on.

Every change request requires an associated revision. When you create a new change request, the system automatically associates the change with an existing revision. If an existing revision is not available, a new revision is created within revision management. All the changes made to the change request reflects in the revision management.

The change request types in the 1:1 Operations Manager portal support most business changes. However, for some low-volume business changes, such as changing decision strategies and editing decision data rules, use the revision management capability to create a new revision and implement the business request. You can implement such changes using revision management in the Customer Decision Hub portal.

As a best practice, use 1:1 Operations Manager portal to initiate the change requests from the existing change management flows to avoid creating conflicts between the two portals.

Transcript

This demo shows you how to create and implement a change request using Revision Management.

U+ Bank uses Pega Customer Decision Hub™ and cross-selling on the web by showing various credit card offers to its customers.

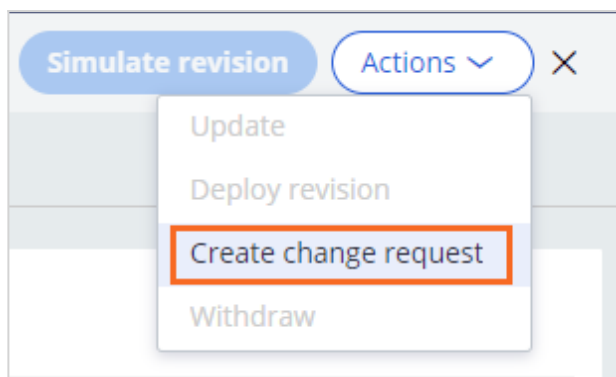
The bank wants to modify the credit score decision strategy that segments customers into two categories based on the customer credit score: **Suitable** and **Not Suitable**.

Such a low-volume business change cannot be achieved by the change request types available in 1:1 Operations Manager. So, you must initiate and implement such change requests using the revision management capabilities of Pega Customer Decision Hub. To carry out the business change, as a team lead, create a revision manually in the Revision Management section of 1:1 Operations Manager.



Note that only one revision can be active at a time, and you cannot create a revision when there is an existing revision in an open state.

Once you create the revision, you switch to Customer Decision Hub to access the revision created in 1:1 Operations Manager. Now, within the same revision, you create a new change request using the Revision Management feature in the Customer Decision Hub portal.



In this case, you create a new change request to edit the engagement strategy and assign the change request to NBA designer.

When you create a change request in 1:1 Operations Manager, the required rules are automatically added to the revision and are available for the NBA designer to edit based on the objective of the task.

When the change request is created in the Customer Decision Hub portal, you must manually add the rules that are necessary to complete the new change request to the revision. This step is to ensure ensures that the rules are available for the NBA designer to implement the change.

For this change request, add the **Credit Score** rule of the Strategy type and submit the change request.

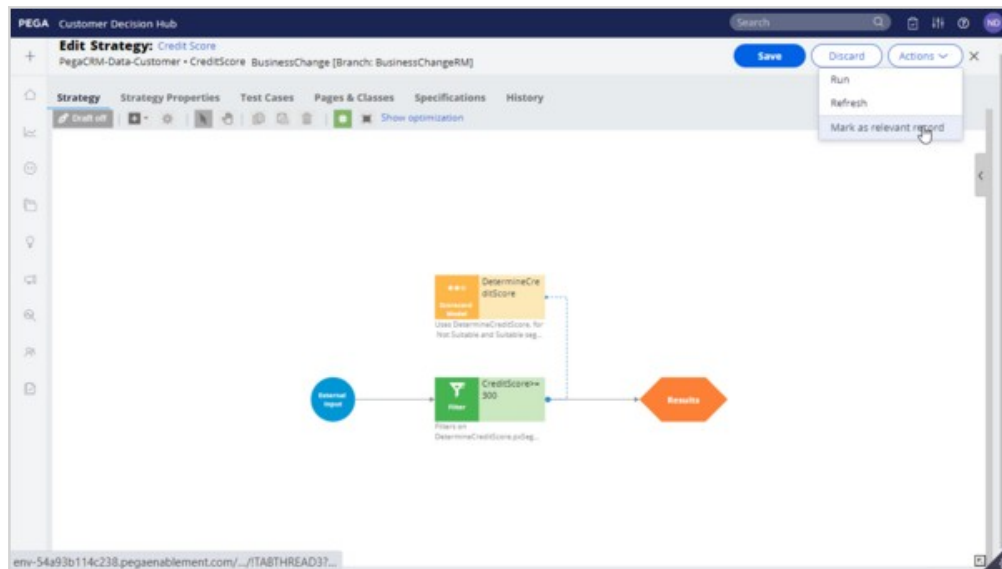
Once the change request is submitted, as an NBA designer, using revision management, you can access the change request assigned to you and the rules associated with it.

In the Revision Management landing page, the **My Work** section displays all the change requests that are assigned to the NBA designer. All the change requests created in 1:1 Operations Manager and in Customer Decision Hub are visible in the list of change requests. The **Scope of changes** section displays all the rules that are available to complete the change.

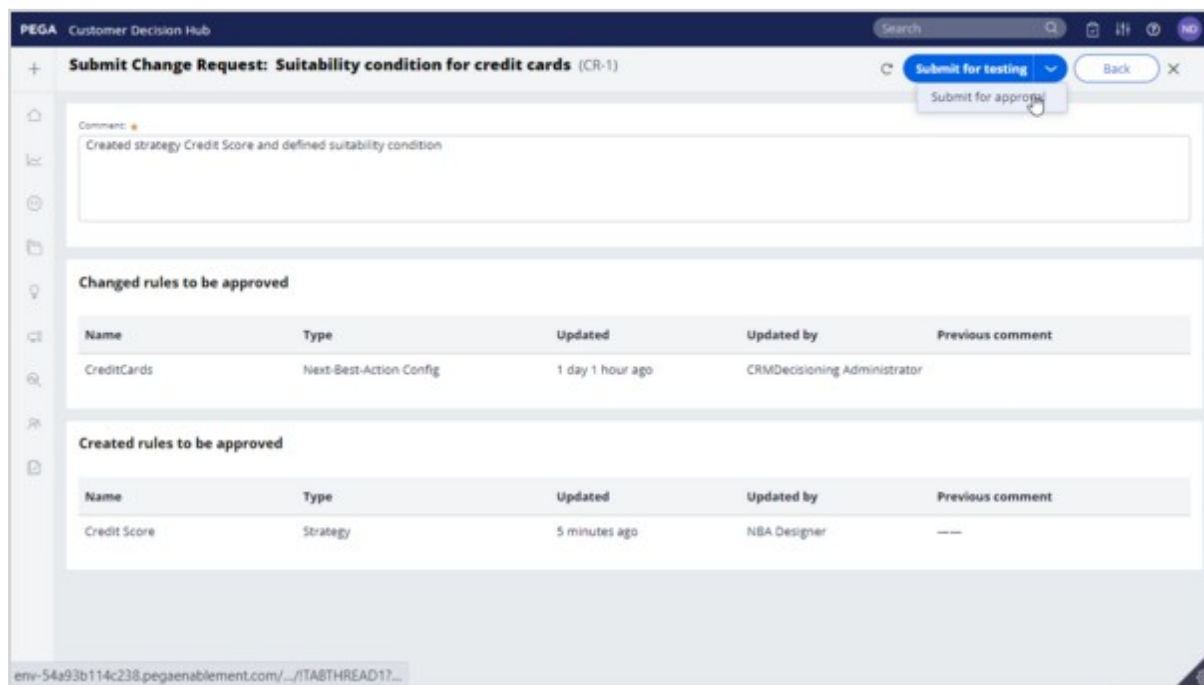
An NBA designer can send the change request back to the team lead if additional rules are required to complete the change request. The NBA designer can also create new rules, and those new rules are automatically added to the change request.

The NBA designer then modifies the engagement strategy that uses a scorecard to determine whether a customer is suitable to receive the credit card.

To make the decision strategy available in the Next-Best-Action Designer, the NBA designer marks the strategy as a relevant record, if not marked already and then submits the change request for approval to the team lead.



In a real-life implementation, at this stage, the NBA designer typically submits the change request for testing to ensure that the business requirement is properly implemented. For this demo, the change request is submitted directly to the team lead for approval.



On the Revision Management landing page, the team lead can access the change request, and then approve it. The status of the change request changes to *Resolved-Completed*.

Once the change request is complete, the changes are available to the revision manager, who can deploy the changes to production.

You have reached the end of the video.

What did it show you?

- How to create a new revision in 1:1 Operations Manager.
- How to create a change request by using revision management in the Customer Decision Hub portal.
- How a team lead can include one or more rules for editing in a change request.
- How an NBA designer can implement a change request in revision management.

Editing a group-level engagement policy

Pega 1:1 Operations Manager currently supports three types of change requests. Selecting the correct change request category initiates the proper change management process flow and ensures that the appropriate rules are copied to the revision, to provide a smooth user experience.

Transcript

This demo shows you how to initiate a business change in 1:1 Operations Manager and implement it using Revision management in Customer Decision Hub portal.

U+ Bank uses Pega Customer Decision Hub™ and currently cross-sells on the web by showing various credit card offers to its customers. The bank now wants to offer credit cards to only those customers with a credit score greater than or equal to 300. So, the bank wants to add a group-level suitability condition in the engagement policy to implement the business change.

Such a change is classified as a low-volume business change and is treated as an “**Other**” type of change request. The objective of this change request is to edit the group-level engagement policy condition. This change request type has similar stages to creating or updating action change requests.

In 1:1 Operations Manager, as a business user, you start implementing the business requirement by creating a change request to capture the business context of the required change. The change request category indicates the type of change, in this case **Other**.

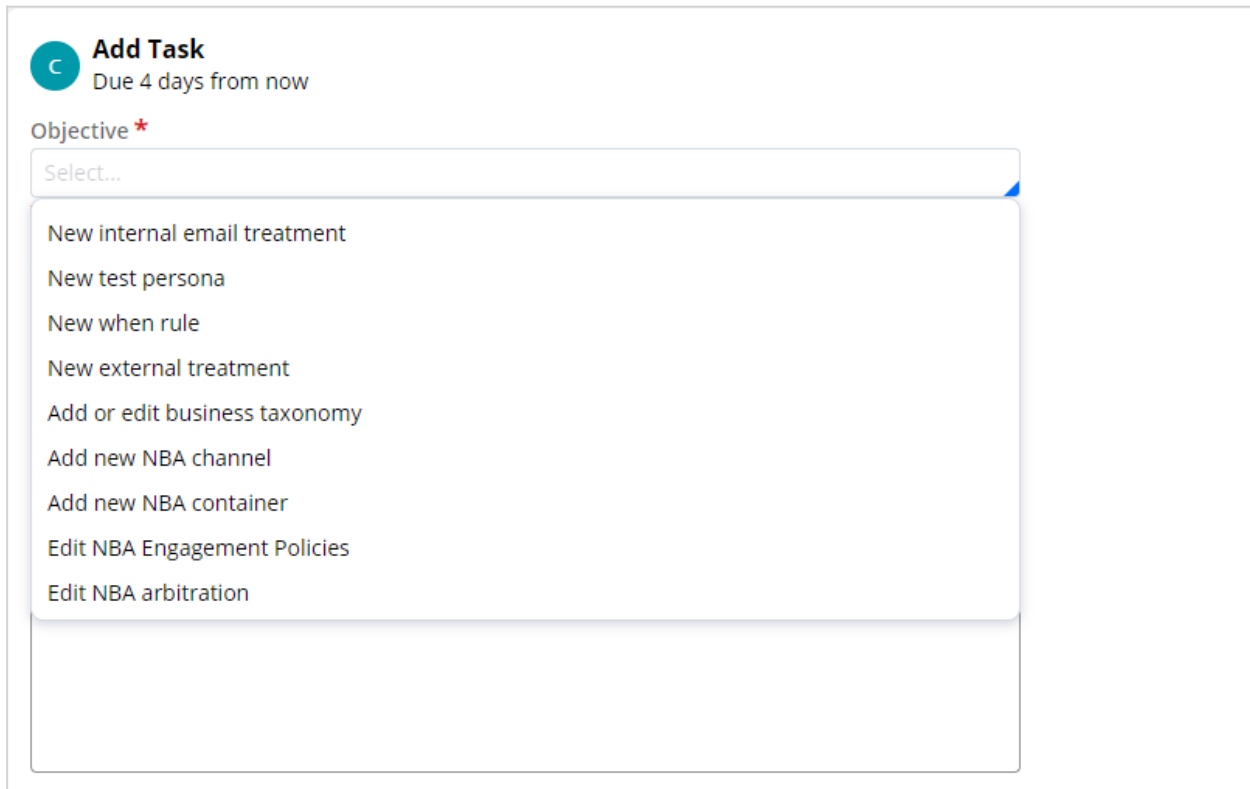
The second step in the change management process flow is to prioritize the change request created by the business user. In this stage, as the team lead, you access the change request created by the business user from the **Change Requests** landing page and assign a rank to the change request.

Then you add the tasks required to implement the business change.

Every task has an objective selected by the team lead from a predefined list of objectives. Selecting the right objective is important because depending on the objective selected, the right rules are automatically made available to the NBA

Designer to make changes during the build stage. This means that in the background, these rules are automatically added to the revision.

In this case, since the business use case is to offer the actions only to those customers with a credit score greater than or equal to 300, you select the objective **Edit NBA Engagement Policies** and then assign it to the NBA designer.



Add Task
Due 4 days from now

Objective *

Select...

- New internal email treatment
- New test persona
- New when rule
- New external treatment
- Add or edit business taxonomy
- Add new NBA channel
- Add new NBA container
- Edit NBA Engagement Policies**
- Edit NBA arbitration

Once the change request is submitted, as an NBA designer you log in to the Customer Decision Hub portal to access the change requests assigned by the team lead.

When you open the change request, in the Scope of changes section, the rule required to edit the engagement policy and add the suitability condition is available.

To add the suitability condition, access Next Best Action Designer and then open the engagement policy for the specific business issue and group. In the **Suitability** section, enter the right engagement policy condition, in this case, *Credit Score higher or equal to 300*, and then save the engagement policy. Then submit the change request.

Once the changes are complete, the change request moves to the test phase and is routed to the NBA specialist for validation. The NBA specialist validates all the artifacts configured and then submits the change request to the team lead.

The team lead then reviews the artifacts and approves them to complete the change request and promotes it to the revision manager for deployment. The status of the change request changes to **RESOLVED-COMPLETED**.

Once the change requests are complete, the changes are made available to the revision manager, who can deploy the changes to production.

You have reached the end of the demo.

What did it show you?

- How to create a change request of **Other** type.
- How to add tasks to a change request and assign it to an NBA Designer.
- How an NBA designer implements a change request in the Customer Decision Hub portal.
- How a team lead can approve and promote the changes to deployment.

Implementing a fast release revision

Description

CDH Fast release allows the Business Content team to implement and deploy critical business changes more efficiently.

Learn how to implement unplanned business changes using CDH Fast release functionality.

Learning objectives

- Explain how the fast release capability of Pega 1:1 Operations Manager works.
- Differentiate the change management process of a fast-track change request from a standard change request.

Fast-release revisions

You implement business changes in the business operations environment (BOE) by using revisions. Each revision consists of one or more change requests. After individually implementing these change requests, when they are ready for deployment, the Revision Manager deploys all the change requests together as a release. This process is a standard release.

However, you might need to implement some unplanned business changes that are of high priority. These unplanned changes are emergency changes to implement and deploy immediately. Such change requests are called fast-track change requests.

Fast track change requests

Fast-track change requests effectively handle urgent business demands. A fast-track change request offers a means to efficiently implement critical changes without interfering with current revisions. Revision Management in Pega 1:1 Operations Manager addresses the fast-track changes by using fast release revisions.

Examples of fast-track change requests include:

1. Fixing a typo in the action that was deployed to production (updating an existing action).
2. Deactivating an action from production (updating an existing action).
3. Communicating with customers in an emergency (creating a new action).

With fast release revisions, the business content team can implement and deploy critical business changes without having to wait for other change requests to be implemented and ready for deployment.

To create a fast-track change request, when you create a request, you mark the change request as a production fix. By completing this action, you add the change request to the fast-release revision, with the release type **CDH fast release**.

New operations change request - X

Name *

Select type *
 Create new action
 Update existing action
 Other

Completion date *

Are you making this change to fix a production defect? [?](#)
 Yes No

Business issue [?](#)

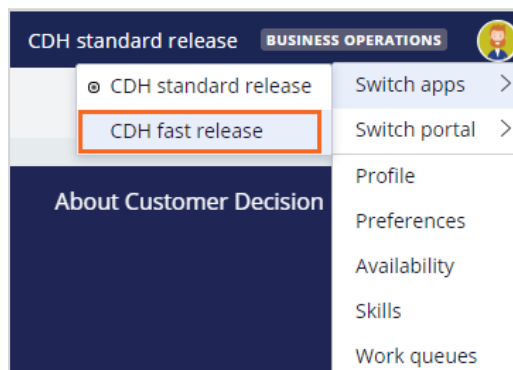
Group [?](#)

Description

Remaining: 1000 characters

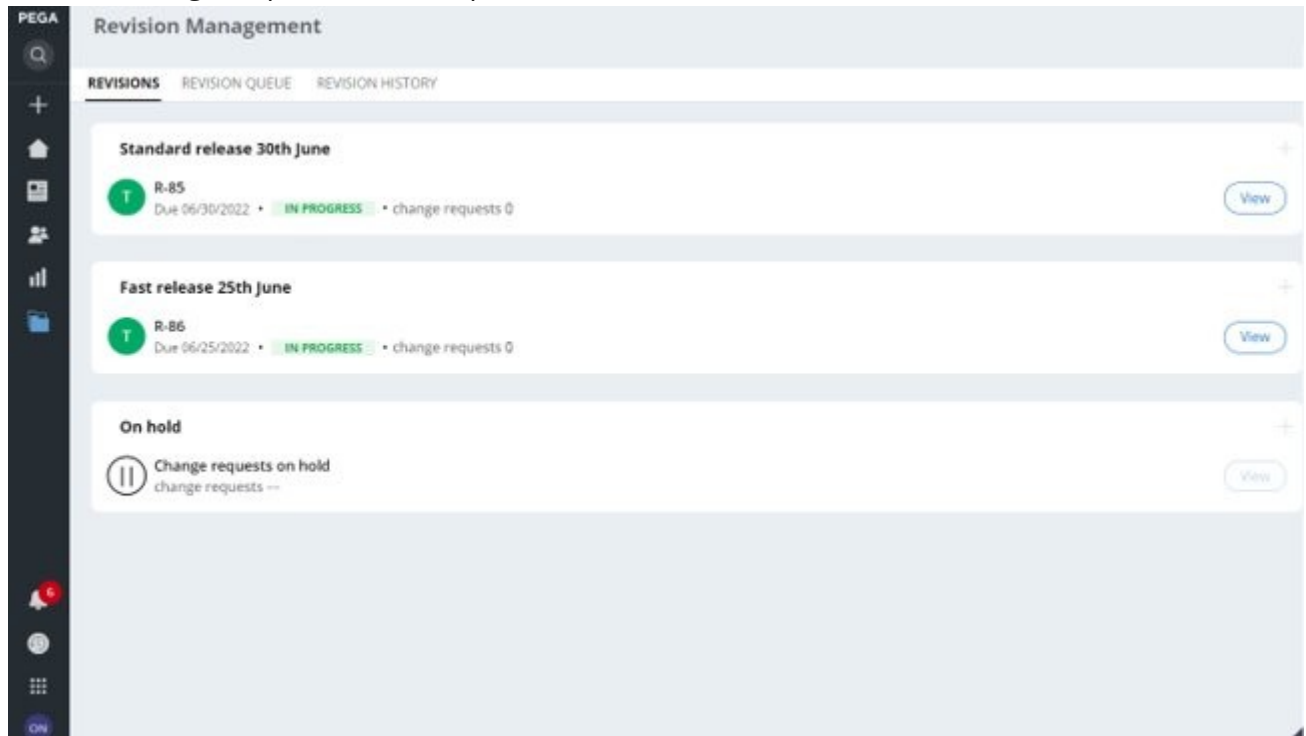
Attach files

The implementation of the fast-track change is similar to a standard business change. During the deployment process, the revision manager switches to the CDH fast release application to deploy the fast-release revision through the **fast release pipeline**.



Like a standard revision, a fast-release revision can also have multiple change requests. You can track the fast-track change requests in the **CDH fast release** section of Revision Management in Pega 1:1 Operations Manager.

The **CDH standard release** section displays the existing standard revision. You can access the list of change requests that are associated with a revision. The **On hold** section lists the change requests that are put on hold.



Note that there can be only one revision for a release, that is, one standard revision in a CDH standard release and one fast-release revision in a CDH fast release.

In summary, you implement and deploy business changes in the BOE in two types of revisions:

- Standard release revisions for regular business change requests
- Fast release revisions for emergency and high-priority change requests