



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

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.

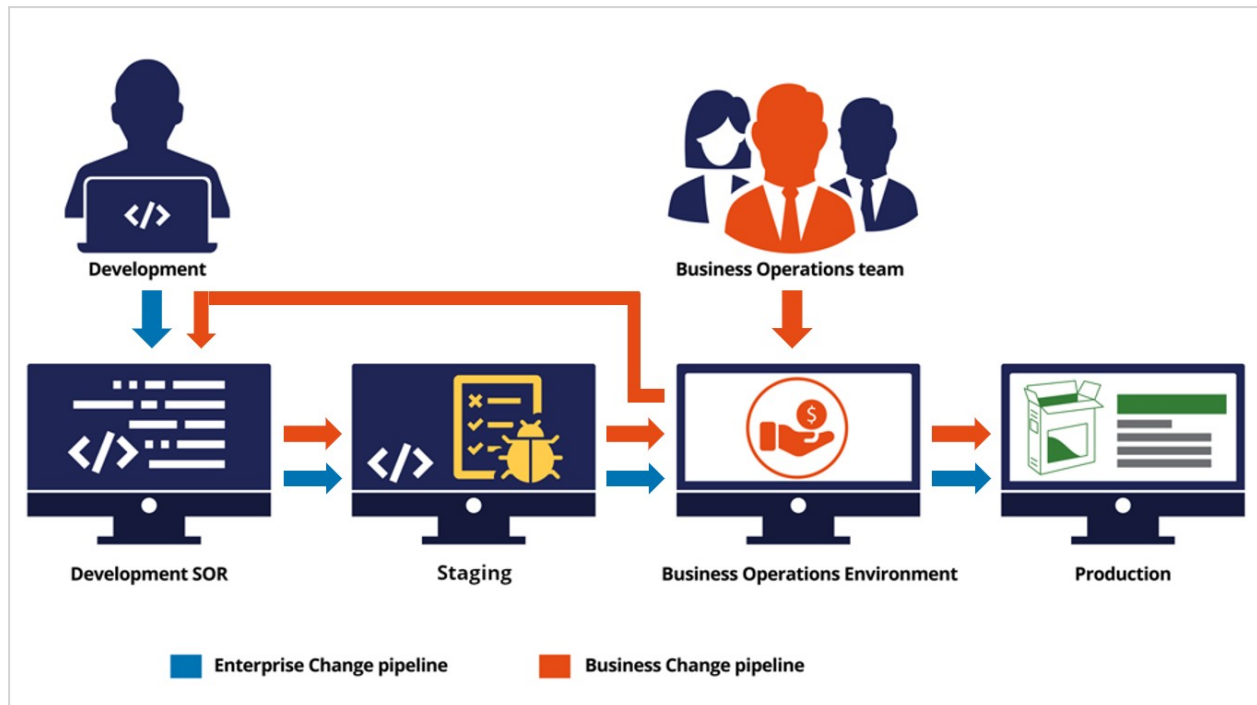
Developers make these changes in the development environment. Changes to the application are pushed to other environments through the enterprise-change pipeline managed by the Pega Deployment Manager™.

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:



 **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



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

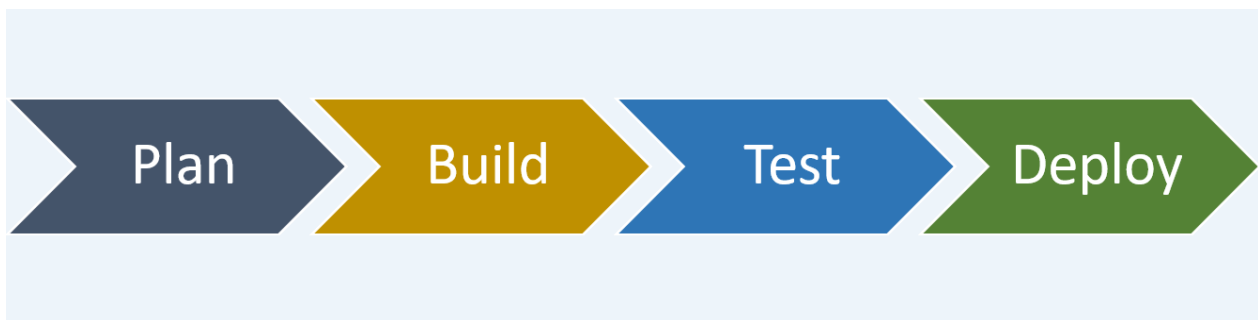
You can scale up operations by adding more team members to this group.

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.

Create Action

OUTBOUND

OUTBOUND

OUTBOUND INBOUND

Re-engagement
Promotional

Re-engage customers who have expressed interest. Examples are a shopping cart abandonment or an indication of interest.

OUTBOUND INBOUND

Retention
Promotional

Engage with customers to ensure they remain loyal, to prevent them from leaving, or win them back. Examples are a one-time credit of \$50 or a discount on your existing services.

OUTBOUND INBOUND

Sales
Promotional

Promote a new or upgraded product or service. Examples are marketing or promotional offers for a new credit card or phone upgrade.

OUTBOUND INBOUND

Announcement
One-time

Send a message to a specific group of customers on an alternate schedule. Examples are the closing of a retail location or message from the CEO.

OUTBOUND

Emergency
One-time

Send a message to a specific group of customers on an alternate schedule. Examples are a service outage or other disruption of service.

OUTBOUND

Change request name *
Promote new card on the web - cashback 5%

Completion date *
8/8/2023

Description
Create new leads from web channel for new Cashback 5% credit card.

Attach files
Filename

Remaining: 934 characters
Are you making this change to fix a production defect? [?](#)
 Yes No

Update existing action

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

Update existing Actions

Name *

Completion date *

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

Yes No

Business issue ?

Group ?

Description

Remaining: 937 characters

Attach files

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.

- Edit attributes
- Edit availability
- Edit bundle attributes
- Edit journey details
- Edit engagement policy
- Edit treatments
- Edit other attributes

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 *
Add applicability condition to Credit cards

Select type *
 Other

Completion date *
8/8/2023

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

Business issue ?
Grow

Group ?
Credit cards

Description
Credit cards are applicable only for the customers with income more than 10000 USD.

Remaining: 917 characters

Attach files
Filename

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.

T Add Task
Due 2 days from now

Objective *

Select...


- New internal email treatment
- New internal SMS treatment
- New when rule
- New external treatment
- Add or edit business taxonomy
- Manage Real-time containers, Events and Outbound schedules
- Manage group-level Engagement policies
- Manage prioritization settings (Arbitration)
- Edit Contact policies, Channel and Action limits
- Edit existing internal email treatment
- Edit existing internal SMS treatment
- New audience
- New DB or File treatment

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.

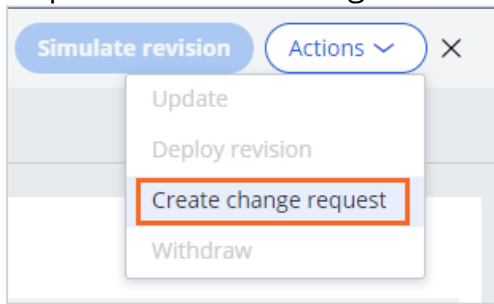
CDH standard release

Update business rules

 R-1
Due 08/08/2023 • **IN PROGRESS** • change requests 1

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.



Fast-track change request

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.

Fast-track change requests offer a means to efficiently implement urgent or unplanned business demands and deploy them immediately.

Mark the change request as a production fix to convert it into a fast-track change request. This step ensures the change request is added to fast-release revision.

Update existing Actions — ✕

Name *

Completion date *

⌄

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

Yes No

Business issue ?

▼

Group ?

▼

Description

 to "for"."/>

Remaining: 923 characters

Attach files

AttachCancelCreate

Once the change requests in a revision are individually implemented and ready for deployment, the Revision Manager deploys all the change requests using business pipelines. The standard revision uses the Standard business pipeline while the fast-release revision is deployed using the Fast Release pipeline.

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

Using Automated insights when creating treatments in 1:1 Operations Manager

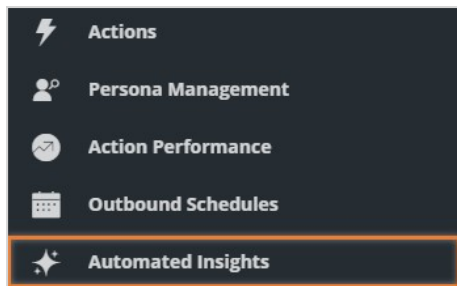
Introduction

Pega Infinity™ '23, introduces new features that use the power of Pega GenAI™ to simplify your daily tasks in Pega 1:1 Operations Manager. One of the main generative AI features available in 1:1 Operations Manager is Automated insights.

Transcript





This video shows you how to use **Automated insights** to make the change request creation process more efficient and effective.

Automated insights combine the power and features of Pega Value Finder analysis with Pega GenAI, to detect underperforming Next-Best-Actions and provide actionable recommendations for improving actions and treatments. The suggestions are available in 1:1 Operations Manager, in the **Automated Insights** section.




U+Bank has several active credit card offers. Based on a Value Finder analysis, the treatments associated with the actions do not bring the maximum business value. The bank aims to increase the accept rate of existing actions.

On the **Automated insights** tab, you can explore the recommended solutions to enhance actions and boost business value.

NEW INSIGHTS	ACTIONED INSIGHTS
>	 Create treatments for Rewards Plus card SUPERIOR CREDIT ELITE
>	 Create treatments for Rewards Plus card LOW-INCOME LONG-TERM RESIDENTS
>	 Create treatments for Rewards card SUPERIOR CREDIT ELITE
>	 Create treatments for Rewards card LOW-INCOME LONG-TERM RESIDENTS

Expand the single recommendation to view its description and details. In the **Recommended content configuration** section, you can review the recommended treatment settings and check how many variants of the treatments are preconfigured. Click **Preview treatment suggestions** to see the two options. You will be able to select one of these options at a later stage.



Create treatments for Rewards card SUPERIOR CREDIT ELITE


Superior Credit Elite have a low response rate for this action. Having treatments that appeal to this customer type may increase your business objective of increasing Grow of Creditcards. We have generated sample treatment options for multiple channels.

Selecting "Progress to plan stage" will initiate the process to update this action, where you can review, accept, reject, edit or reconfigure the recommended content.

Recommended content configuration

Channels	Web
Principle	Cialdin's principle of authority
Tone	Formal
Variants	2

[➔ Proceed to plan stage](#)



Preview treatment suggestions

In this case, a particular audience exhibits a low response rate for the Rewards card. Presenting this offer to the **Superior Credit Elite** customer type would likely result in a higher accept rate.

Selecting **Proceed to a plan stage** initiates the process of updating the action with the recommended treatment. The newly created change request includes Pega GenAI-generated suggestions, providing the opportunity to modify or reject them based on business needs.

New change request: Update action treatments ✕

Generated with Pega GenAI™
 This change request will include AI-generated treatment suggestions. You will have the opportunity to decline or modify this content, or add your own treatments

Change request name *

Action
 Rewards card

Completion date *

Description

Remaining: 947 characters

Attach files

In the **Define channels and treatments** stage, you can observe two treatment recommendations for the action. U+ Bank aims to maximize the interest in the action, so proceed with both recommended options.

Each recommendation provides two variants of predefined treatments with Pega GenAI-generated images. Additionally, you can also observe the initial **Rewards card tile** treatment. Remove the variants that are less appealing, then set the **Placement type** to **Tile** and continue.

Automated insights

Create treatments for Superior Credit Elite [Use and refine](#)

Superior Credit Elite have a low response rate for this action. Having treatments that appeal to this customer type may increase your business objective of increasing Grow of Creditcards. We have generated sample treatment options for multiple channels.

Selecting "Progress to plan stage" will initiate the process to update this action, where you can review, accept, reject, edit or reconfigure the recommended content.

Recommended content configuration

Channels	Web
Principle	Cialdini's principle of authority
Tone	Formal
Variants	2

[Preview treatment suggestions](#)

[>](#) **Create treatments for Low-income long-term residents** [Use and refine](#)

After you successfully create the change request as a Business User, log in as a Team Lead and prioritize the change request.

The next step is to complete the action build task. Log in as an NBA Specialist and check if you see the Design web treatment tasks for each of the newly created treatments. Assign the Design web treatment tasks to yourself and complete them one by one. As an NBA Specialist, you can also regenerate Pega GenAI-generated treatment images if they don't meet the business requirements. Pega GenAI-generated images can be used as an inspiration. However, the final decision about the content rests with the operations team.

From this point, the NBA Specialist, the Team Lead and the Revision Manger can finish the process until the new changes are deployed to production.

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

- What Automated Insights are in 1:1 Operations Manager.
- How to use Automated Insights recommendations to make the Change Request creation process more effective and efficient.

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.

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

In the action creation window, you can select the pre-defined action type, that most closely matches the use case or you can create the custom action change request.

Opting for the predefined action type automatically populates certain data within the change request.

The bank wants to introduce a new offer, so select the category Sales.

In the change request form, enter a name that describes the purpose of the request.

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

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`.

Select the appropriate Business issue and Group if you know it. 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.

Continue to define the journey stage.

In the **Define journey stage**, you can mark the action to be available only when a customer is on a specified customer journey stage.

Click continue to skip this step and define the engagement policy.

In the **Define engagement policy** section, there are two options to define the engagement policy details.

You can describe the requirements using business language. The NBA Specialist is responsible for implementing these requirements later in the build stage.

You can also select the **Use condition builder** option to see four categories to define the criteria.

Eligibility rules are rules that qualify a customer for an action. For example, the age of the customer must be greater than or equal to 18.

Applicability rules are factors that determine if an action is appropriate at this point for this customer. For example, the customer does not own any credit cards yet.

Suitability rules are conditions that determine if an action is deemed appropriate and is in the best interest of the customer. For example, customer's debt-to-income ratio should be less than or equal to 48.

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: `Annual Income is greater than 10000`.

Continue to define the channels.

Finally, in the **Define channels** section, you can select the channel and add details about the channel in which the action is presented. As you opted for the predefined "Sales" action type at the beginning of the change request creation process, two channels—E-mail and Web—are preselected at this stage. In this case, the bank wants to display this offer on the web channel. Therefore, delete the E-mail channel group. In the **Web channel group** window, you can provide details for one or more web treatments (for example, the availability date and the placement type such as hero or tile). 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>Always** is selected. Complete the task.

The **To do** list now has just two tasks remaining. The next task is to define the journey stage of the action. Assign the task to yourself.

On the **Define journey stage** tab of the task pane, you can mark the action to be available only when a customer is on a specified customer journey stage. Click continue to skip this step and define the engagement policy.

On the **Configure engagement policy** tab, you can view the engagement policy that the business user defined per the business requirement.

In this case, the business user defined the eligibility rule: **Annual income is greater than 10000**. Continue the task.

The next step is to verify if the engagement policy is correct. In this case, select Joanna, a customer who is supposed to receive the **Cashback 5 card** action, as her annual income is greater than 10000, 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 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.

Creating treatments with GenAI

Introduction

Pega software suite, Pega Infinity™ '23, introduces new features that use the power of Pega GenAI™ to simplify your daily tasks in Pega 1:1 Operations Manager. One of the main generative AI features available in 1:1 Operations Manager is treatment creation.

Transcript

This video shows you how to create a treatment in 1:1 Operations Manager, using Pega GenAI features.

A treatment represents a message to be communicated to a customer. With Pega GenAI, designing persuasive web and e-mail treatments becomes easier and more efficient.

To enable the image generation functionality, you must configure your own generative AI image provider and set a provider key. Without this key, the application will not generate images.

U+Bank plans to announce a new, Travel Rewards card offer to its customers, through web and e-mail channels.

To begin, create a new change request of the **Create > Action** type, give it an appropriate name and description, and select the completion date.

Create Action - X

Select the pre-defined Action type that most closely matches your use case. These types pre-populate certain attributes, including if it's an Always-on or One-time Action. Q Search...

[Change selection](#)

Sales
Promotional

Promote a new or upgraded product or service. Examples are marketing or promotional offers for a new credit card or phone upgrade.

OUTBOUND INBOUND

Change request name * Completion date *

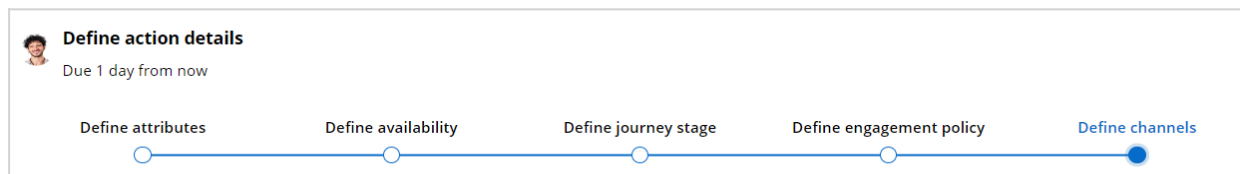
Description Attach files [Attach](#)

Remaining: 772 characters
Are you making this change to fix a production defect? [?](#)

Yes No

[Cancel](#) [Create](#)

In the Plan stage of the change request completion process, you can define the attributes, availability, journey stage, and engagement policies. Once completed, you proceed to the **Define channels** stage.



In the **Define channels** stage, two treatment creation windows are open: e-mail and web. In this case, these treatment types are predefined because you selected the Sales action type at the beginning of the process.

The Pega GenAI feature is available in both web and e-mail treatment creation windows, after you click the purple **Polaris** icon.

When creating an email treatment, Pega GenAI assists in generating a message to a customer, based on the provided input details.

You then select one of seven Cialdini's Principles of Influence to specify the aim of the message.

Depending on the selected principle, the generated message will be authoritative, empathetic, or focused on the scarcity of a particular offer.

After selecting the principle, determine the tone of voice for the message. Finally, outline the specific items you wish to emphasize in the treatment.

The screenshot shows a configuration window titled "Treatment 1" with a subtitle "Cialdini's principle of social proof • Formal". It features a "Configure AI" section with a "Principle" dropdown set to "Cialdini's principle of social proof" and a "Tone" dropdown set to "Formal". Below this, there are checkboxes for "Generate fields" including "Headline", "Subject", "Body", and "Image", all of which are checked. A "Generate treatment" text area contains the text: "U+Bank would like to present the new, exclusive, travel rewards card offer to their loyal, long-term customers." At the bottom, there are "Cancel", "Preview prompt", and "Generate" buttons.

Before generating the e-mail, click on the Preview prompt button, to view the instructions and the details used by Pega GenAI to generate the final message.

The screenshot displays the Pega GenAI interface for creating a "New, Travel card offer". On the left, a sidebar shows the "Details" section with fields for "Rank", "Status", "Request type", "Completion date", "Business issue", "Group", "Created", and "Updated". The main workspace shows a "Channels" section with an "Email channel" selected. A "Treatment" configuration window is open, showing the same "Configure AI" settings as the previous screenshot. Below the configuration, there are fields for "Name" (Travel Rewards), "Key code", "Subject line", and "Offer message". A "Preview prompt" button is visible, and the "Generate" button has been clicked, resulting in the generation of the email content.

After clicking Generate, Pega GenAI creates a formal e-mail within seconds. You can review the generated content and make updates if necessary,

Subject line: Introducing the new Travel Rewards Card - elevate your travel experience!

Headline: Unlock a world of possibilities with the ultimate travel companion!

Offer message:

Dear valued customer,

We are thrilled to introduce our latest offering - the Travel Rewards Card! As one of our loyal, long-term customers, we believe this exclusive card is the perfect companion for your globetrotting adventures.

With the Travel Rewards Card, you can elevate your travel experience and turn every journey into a memorable adventure. Enjoy a range of exclusive perks and benefits designed to enhance your travels, such as complimentary airport lounge access, priority boarding, and travel insurance coverage.

As part of our commitment to providing exceptional service, we have partnered with leading airlines, hotels, and travel providers to offer you special discounts and privileges. Whether you have a dream destination in mind or simply love exploring new places, the Travel Rewards Card will help make your travel dreams a reality.

Apply for the Travel Rewards Card today and unlock a world of possibilities. Start planning your next adventure with confidence, knowing that you have the ultimate travel companion by your side.

Sincerely,
[Your Name]

Image:

Each part of the message, such as the **Subject line**, the **Headline**, the **Offer message**, and the **Image**, can be re-generated or edited separately.

Headline: Unlock a world of possibilities with the ultimate travel companion!

AI options menu:

- Re-generate
- Elaborate
- Shorten
- Configure

is the perfect companion for your globetrotting adventures

The other elements of the e-mail treatment, for example **Name**, **Availability** and **Business weight** must be set manually.

For the web treatment, which is the visual presentation of the offer on the website, Pega GenAI can generate an image that matches the offer, based on the given details.

Web channel group

Treatment 1: Cialdini's principle of liking • Formal

Configure AI

Principle: Cialdini's principle of liking

Tone: Formal

Generate fields:

- Image

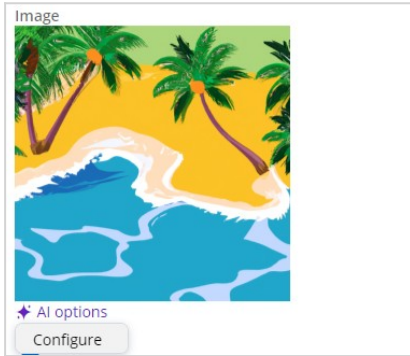
Generate Treatment:

U+Bank wants to offer a new Travel Rewards Card to their valued customers.

Buttons: Cancel, Preview prompt, Generate

You can select the **Principle** and the **Tone**, write the description in natural language and click Generate to see the AI-generated image.

If the image does not meet the business requirements, you can regenerate it by clicking the **Polaris** icon and then clicking **Configure**. In the **Configure AI** window, you can write a new description and generate a new image.



Set the remaining treatment elements manually and **Finish** the task.

After you successfully create the change request as a Business User, log in as a Team Lead to prioritize the change request.

The next step is to complete the action build task. You log in as an NBA Specialist and check for tasks related to the New, Travel card offer.



Assign the tasks to yourself and complete them one by one.

Finalize the first task by submitting the action details. Then complete the second task without adding a journey stage or engagement policies.

In the Design web treatment task, review the details of the treatment. As an NBA Specialist, you can also regenerate the image using the Pega GenAI feature if it doesn't meet business requirements. AI-generated images can be used as an inspiration. However, the final decision about the content rests with the operations team.

In the Design e-mail treatment task, review the details of the treatment and if needed, regenerate them using Pega GenAI. As an NBA Specialist, you must also complete the Destination field. Select Email output template from the dropdown list and then complete the task.

Business user and NBA Specialist, both have the right to use Pega GenAI capabilities and the Team Lead can review the contents created by Pega GenAI and approve it. It ensures that a chain of people checks the content generated by the AI.

Following the submission of updates by the NBA Specialist, log in again as a Team Lead to approve the updates and promote them for deployment.

The final step in the process is for the Operations Manager to deploy the changes to production.

You have reached the end of this video. You have learned:

- How to streamline the process of creating treatments using Pega GenAI features.
- The benefits of using Pega GenAI features.

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 Operations 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. Depending on the type of update required, you can select the task from the available list.

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

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

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

Updating existing actions in bulk

Introduction

One of the change requests currently supported in 1:1 Operations Manager is the **Action update** change request. Initiating this request triggers a process for updating the properties of single or multiple actions. Within the **Action update** change request, the **Bulk Edit** option is available, streamlining the creation of change requests aimed at updating several actions with one specific modification.

Transcript

In 1:1 Operations Manager, there are three types of change requests that are currently supported:

- Create Action
- Create Action update
- Create Other

In addition to single action updates, the **Action update** change request type enables you to perform bulk updates on always-on actions. A bulk edit feature is a valuable option when you need to implement a specific change across multiple actions. For instance, if a business requirement entails modifying the availability of 100 actions, instead of creating change requests and modifying settings separately for each action, you can make a unified modification. The bulk update simplifies the process of creating change requests for multiple actions.

Consider the following scenario: U + Bank, a retail bank, wants to limit the availability of two actions: the Rewards Card and Rewards Plus card, and make them available only for the next two weeks.

To meet the business requirement, you need to design a bulk edit change request. As a Business user, create the **Action update** change request and select the credit card actions

that require editing.

Update existing Actions

Name *
Update the availability

Completion date *
8/17/2023

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

Business issue ?
Grow

Group ?
Credit cards

Description
Update the availability of the Rewards and Rewards Plus cards: Availabile within a defined period of time from 10.08.2023 to 24.08.2023

Remaining: 865 characters

Attach files
Filename

In the **Detail Updates for Selected Actions** stage, the **Bulk edit** option becomes accessible when you choose two or more actions from the list. In this case, select the Rewards Card and Rewards Plus Card, and proceed with the bulk update. The bulk edit option supports several predefined tasks. In this case, modify the action availability.

Detail updates for selected Actions

Due 6 days from now •

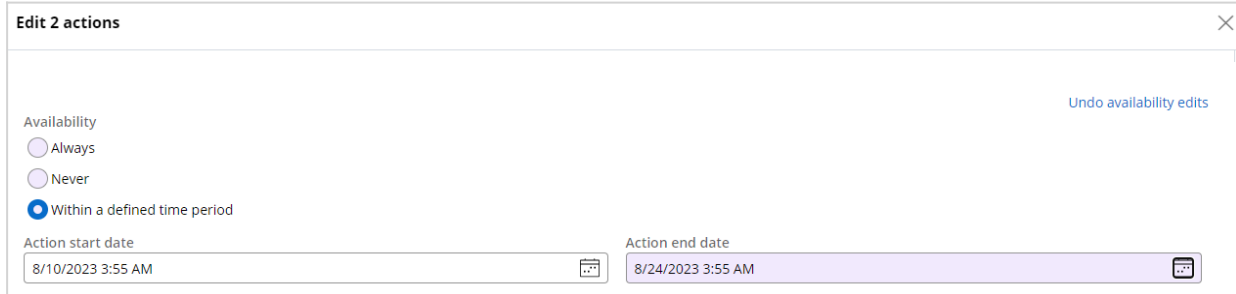
Select actions to update Detail updates for selected actions

Search... 2 results

<input checked="" type="checkbox"/>	Action	Con	Issue	Group	Treatments
<input checked="" type="checkbox"/>	Rewards card	Cust	Grow	Creditca...	1
<input checked="" type="checkbox"/>	Rewards Plus card	Cust	Grow	Creditca...	1

- Edit attributes
- Edit availability**
- Edit bundle attributes
- Edit treatments
- Edit other attributes

Within the **Edit 2 actions** window, you can set the actions as available at all times (always visible to customers), unavailable (never active), or within a defined time period (visible temporarily). Adjust the availability timing according to the requirement, and submit the change request.



The screenshot shows a window titled "Edit 2 actions" with a close button (X) in the top right corner. On the right side, there is a link that says "Undo availability edits". Under the heading "Availability", there are three radio button options: "Always", "Never", and "Within a defined time period". The "Within a defined time period" option is selected. Below these options, there are two date and time pickers. The first is labeled "Action start date" and has the value "8/10/2023 3:55 AM". The second is labeled "Action end date" and has the value "8/24/2023 3:55 AM". Both pickers have calendar icons to their right.

After you successfully create the change request as a Business User, log in as a Team Lead to prioritize the change request.

The next step is to complete the action build task. Log in as an NBA Specialist and check if you can see two tasks, one for each action. Despite having created a single bulk edit change request for multiple actions, as an NBA Specialist, you should complete tasks individually.

Assign the first task to yourself and finalize the task by reviewing the availability setting. Given that the Business User has updated availability during the planning stage, the build stage only requires verification and confirmation of the changes. Upon completing the build stage, review and submit the task. Repeat the same process for the second task and then submit the changes.

Following the submission of updates by the NBA Specialist, log in again as a Team Lead to approve the updates and promote them for deployment.

The final step in the process is to deploy the changes to production using 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**.

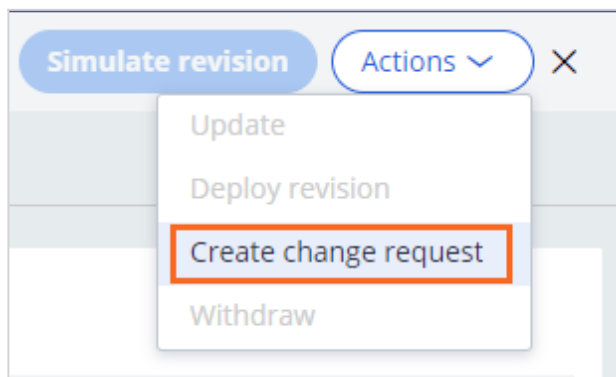
Such a low-volume business change cannot be achieved by the change request types available in 1:1 Operations Manager. So, you must initiate and implement

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.

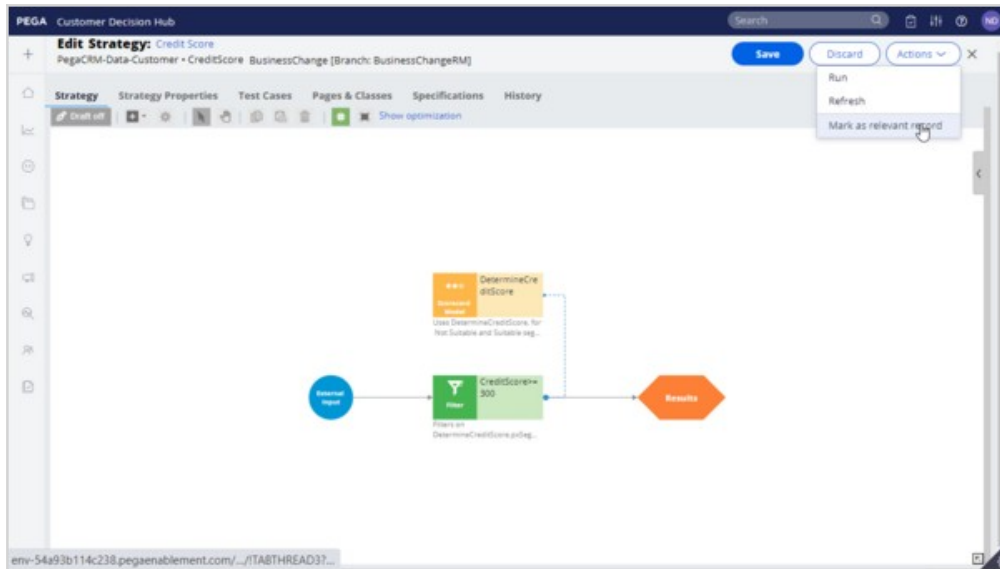
Once the change request is submitted, as an NBA designer, using revision management, you can access the change request assigned to you and the rules associated with it.

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.

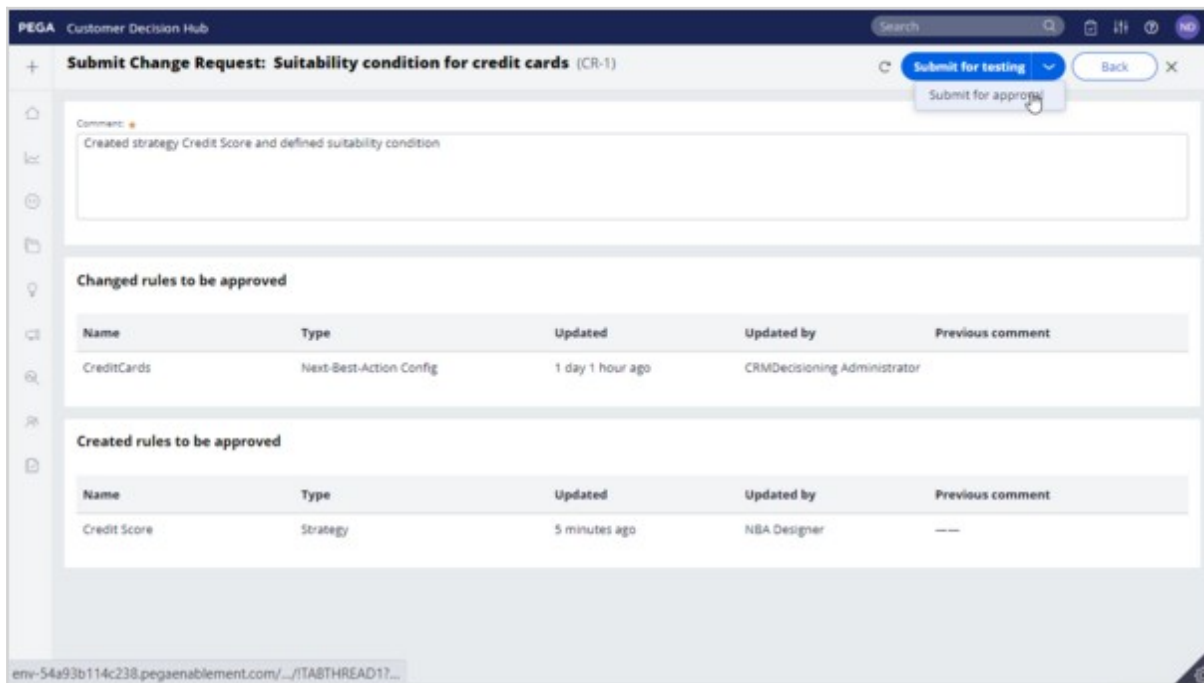
An NBA designer can send the change request back to the team lead if additional rules are required to complete the change request. The NBA designer can also create new rules, and those new rules are automatically added to the change request.

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 **Manage group-level Engagement policies** and then assign it to the NBA designer.

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

Learn how to efficiently implement and deploy critical and emergency business changes by using the 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**.

Update existing Actions

Name *
Fixing a typo in the Standard Card action de

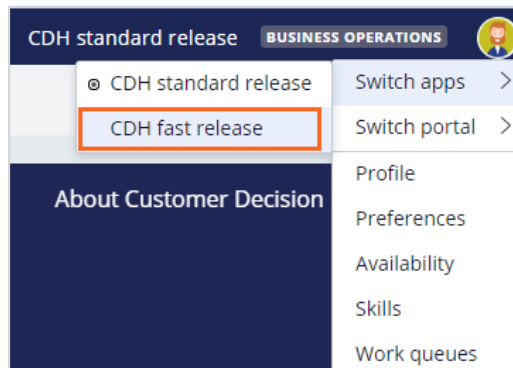
Completion date *
8/25/2023

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

Business issue ?
Grow

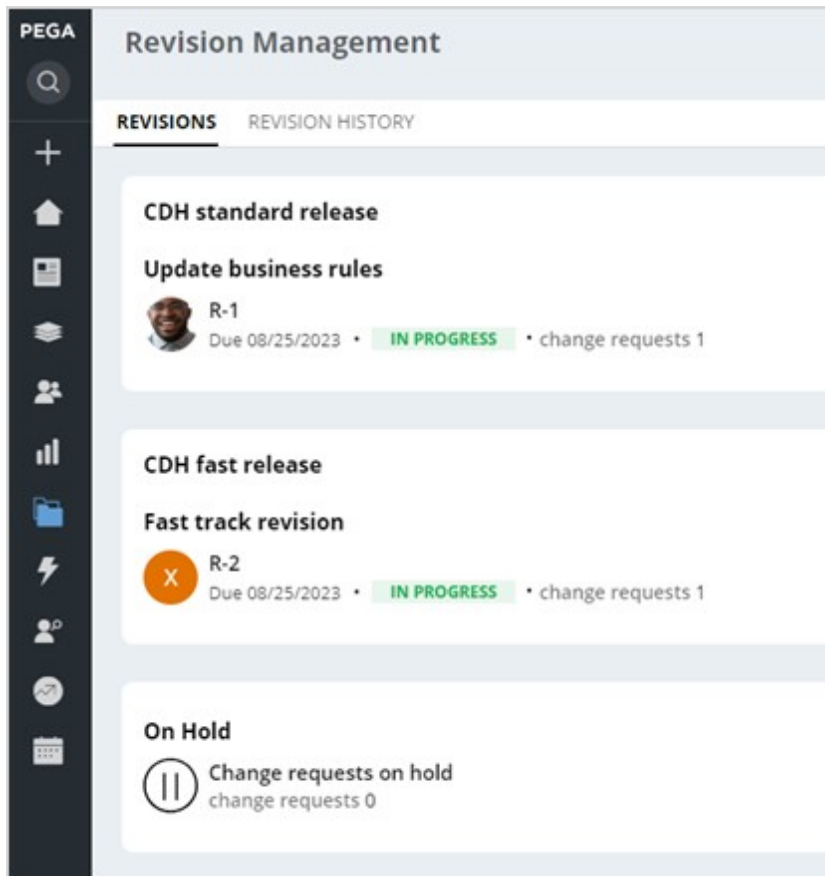
Group ?
Credit cards

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

Implementing outbound communication in the BOE

Description

Discover how to implement outbound customer engagement in a Business Operations Environment (BOE) and deploy necessary changes to production. Explore how you can create essential artifacts for outbound communication by using Pega 1:1 Operations Manager.

Learning objectives

- Create and deploy one-time Actions in a BOE.
- Create and deploy artifacts required for implementing outbound communication.

One-time actions

Effective communication is critical for a business, especially when it comes to delivering timely and urgent messages to customers. In exceptional circumstances, businesses may need to contact all, or a subset of their customers, outside of their regularly scheduled updates. For example, if U+ Bank temporarily closes one of its branches due to maintenance activity, it should send out an email communication to all customers, or those who are affected.

In such scenarios, you can send out the communications using one-time actions.

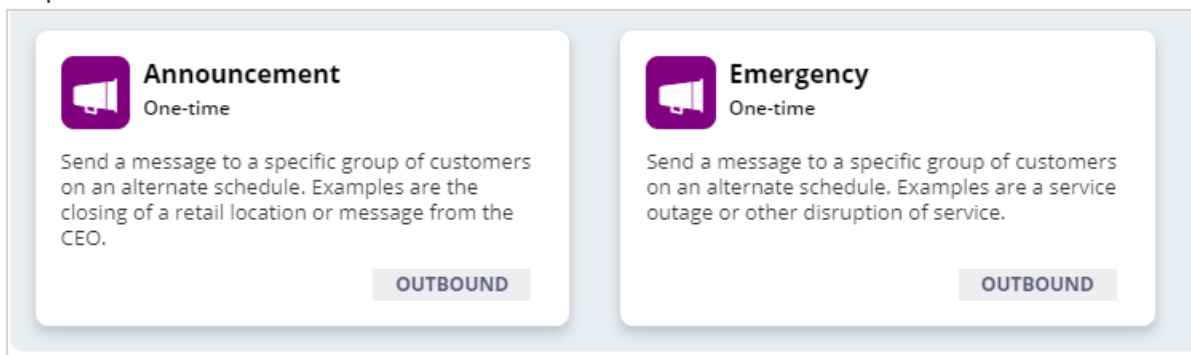
A one-time action is a batch communication that all or a subset of customers receive at a specific date and time, that is not coordinated with the always-on outbound schedules. These actions are created in a Business Operations environment to deliver one-time urgent or time-sensitive communications that do not repeat automatically.

When should you use One-time actions?

One-time actions are sent when the communication:

1. Must be sent to all or a group of customers.
2. Must be sent at once to all the customers and should not be repeated.
3. Communication is to be sent outside the regular outbound schedules.

To create a one-time action, you must choose the relevant tile while creating the change request.



Examples of one-time action change requests include:

- An emergency communication to all the customers from the CEO.
- Compliance notice notifying customers of changes in benefits and terms.

- Announcement of a branch closure.
- Communication of services outage due to maintenance activity in an area.

Unlike always-on actions, no engagement policies or constraints apply to one-time actions. One-time actions use a defined audience, and all the members of that audience receive the same message at the same time. These actions can be created and deployed to production through both standard release and fast-release revisions. However, as most one-time actions are used for immediate communication, it is recommended to use fast-release revision for deploying one-time actions.

The following figure shows which policies and constraints apply to different outbound interactions:

		Eligibility/ Applicability/ Suitability conditions	Arbitration	Outbound channel limits	Outbound action limits	Contact policies
Always-On actions	Promotional (Default actions)	✓	✓	✓	✓	✓
	Transactional actions	✓	✓	✗	✓	✓
	Mandatory actions	✓	✗	✗	✗	✓
One-time actions	One-time actions	✗	✗	✗	✗	✗

Creating a One-time action

One-time actions are created in 1:1 Operations Manager in a Business Operations environment, to deliver one-time, urgent, and time-sensitive communications that do not repeat automatically.

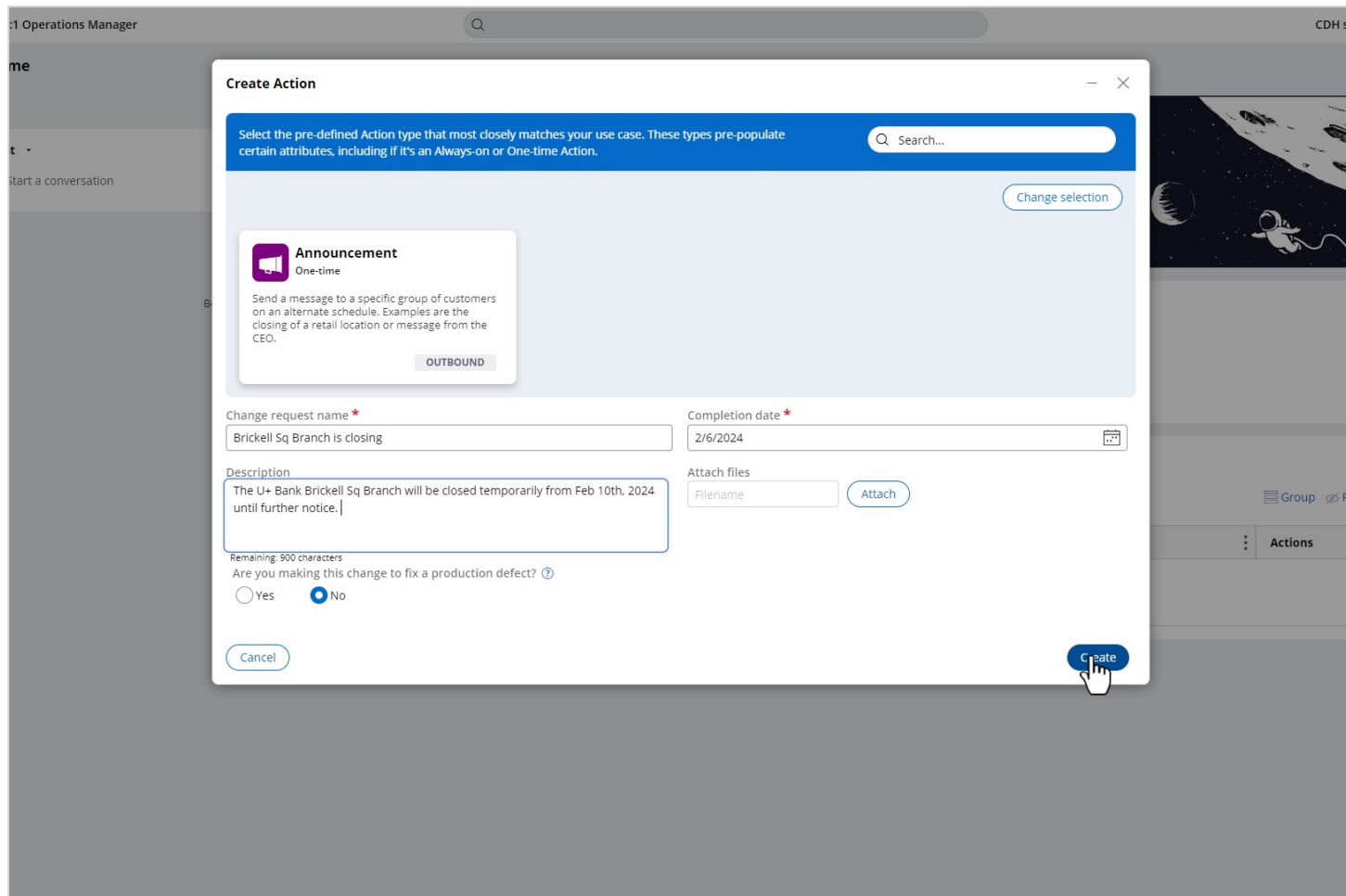
Transcript

This video demonstrates how to create a one-time action in 1:1 Operations Manager.

U+ Bank intends to temporarily close its operations at the Brickell Square branch because of planned maintenance work. The bank wants to communicate the message to all customers or those who are affected, through an email channel.

The process of creating a one-time action is the same as creating a new action in 1:1 Operations Manager.

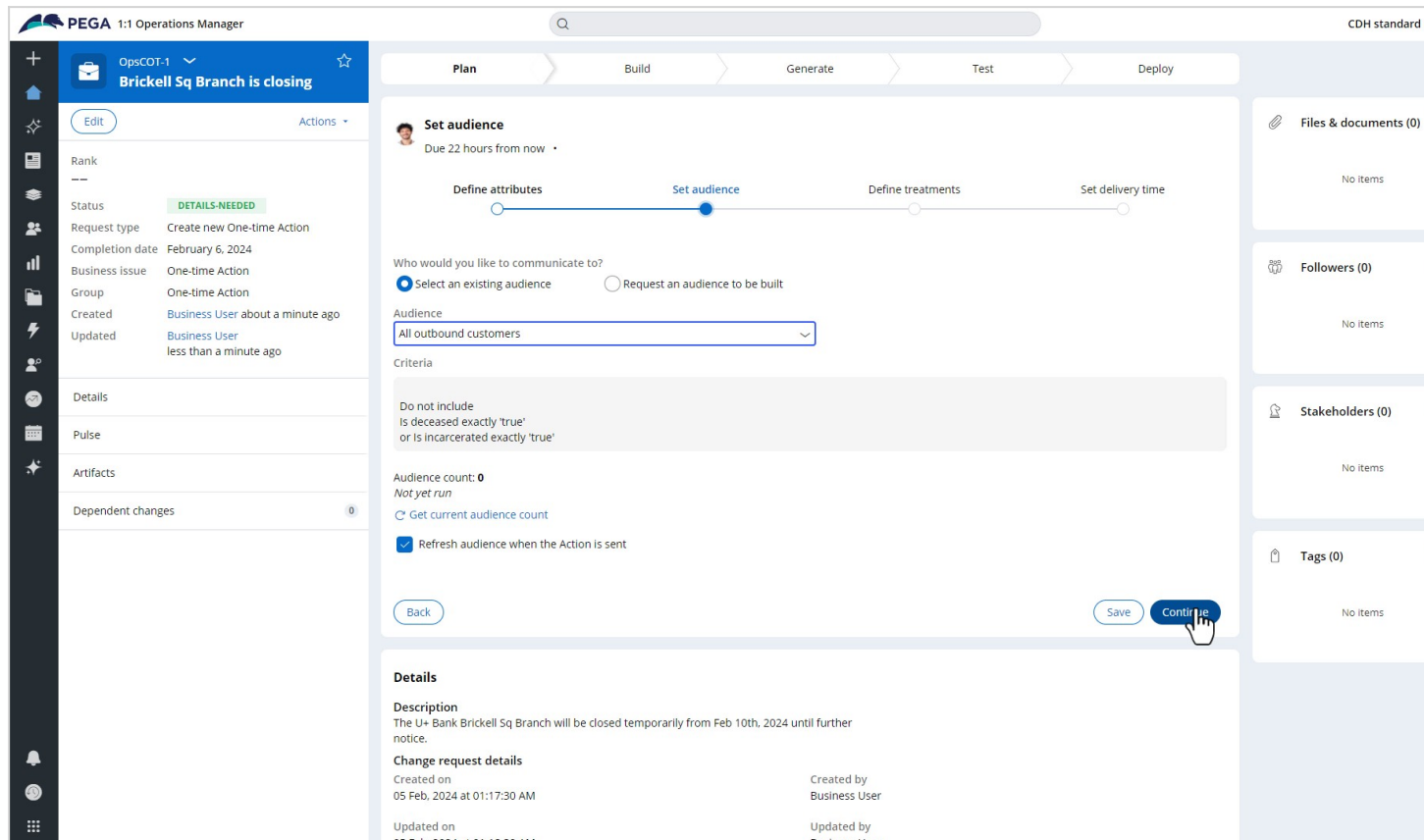
To begin, as a Business User, you create a new change request of the **Create > Action** type and select the appropriate tile. In this case, **Announcement**. Enter an appropriate name and description for the change request and specify the completion date.



In the **Plan** stage of the change request process, you define the attributes. In the **Define attributes** section, note that the Business issue and group default to One-time action. Enter a description and continue to set the audience.

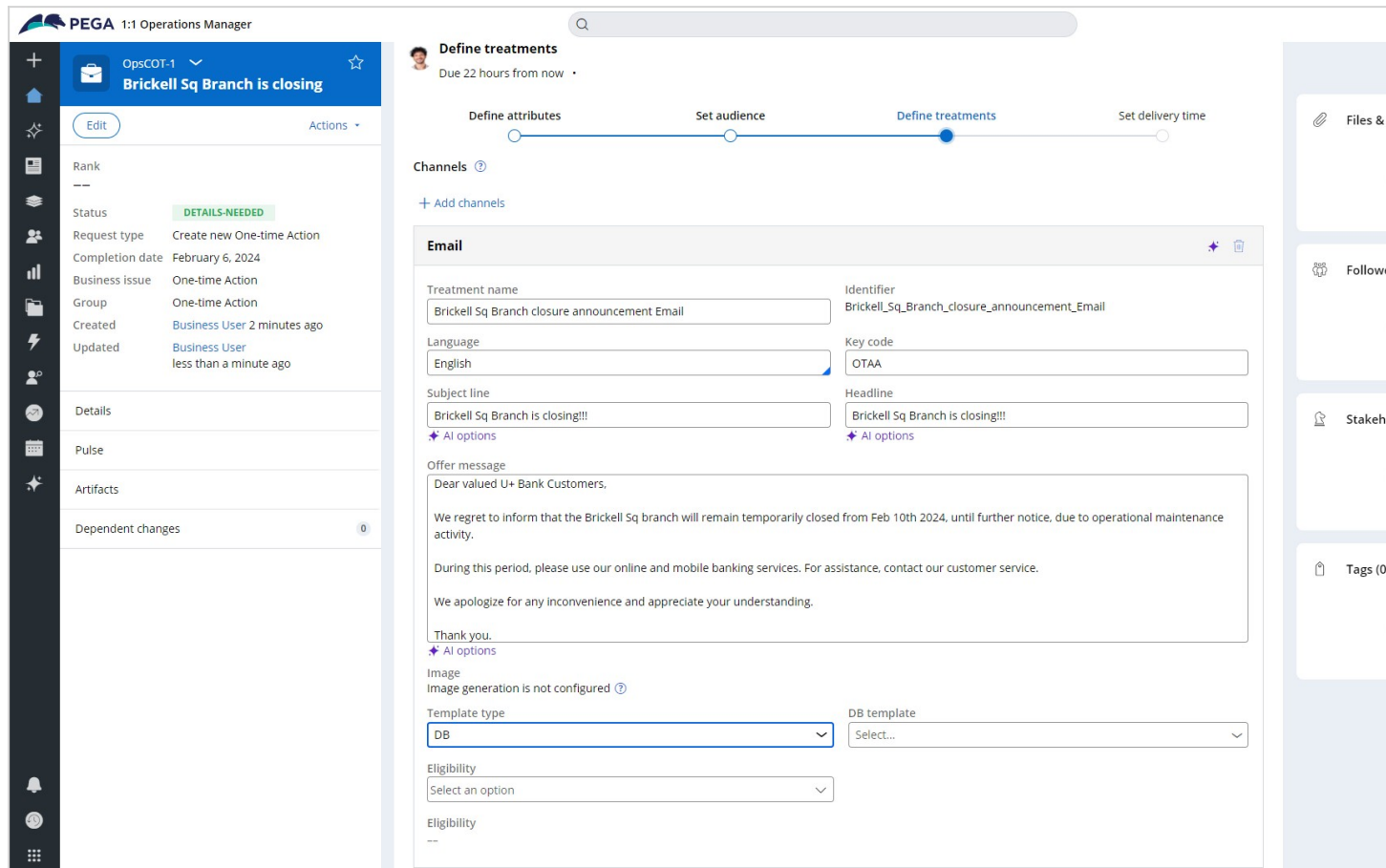
Audience refers to a list of potential target customers, which is implemented using the segment component. A segment is a reference to a database table containing a list of customer IDs that match specific criteria.

You can either select an existing audience or request a new audience to be built by NBA Designer. If you choose to request a new audience, the system creates a separate change request, called *Create an audience*. NBA Designer must complete this change request before the current change request moves to the Build stage. This ensures that the NBA Specialist can utilize the audience created by the NBA Designer while implementing the current change request.



Note that the existing audience is the list of the segments that are available in the overlay.

In the **Define treatments** task, enter the treatment name, email subject line, headline, and offer message, which forms the email body. You can use the Pega GenAI feature to generate the contents of the email. Additionally, you can specify the output template type as either DB or File.



Next, you set the delivery time and finish the task.

After you create the change request as a Business User, log in as a Team Lead to prioritize the change request.

The next step is to log in as an NBA Specialist and complete the action build tasks.

In the first step, finalize the action attributes. In the Set audience step, ensure that the right audience is selected. Then, define the treatments. Review the treatment details and make edits if necessary. As an NBA Specialist, you also need to configure the **Template type** field. Select the Email output template from the drop-down list.

PEGA 1:1 Operations Manager

OpsCOT-1
Brickell Sq Branch is closing

Plan Build Generate Test Deploy

Set delivery time
Due 22 hours from now

Define attributes Set audience Define treatments Set delivery time

When do you want this delivered? *

2/7/2024 1:31 AM

Email

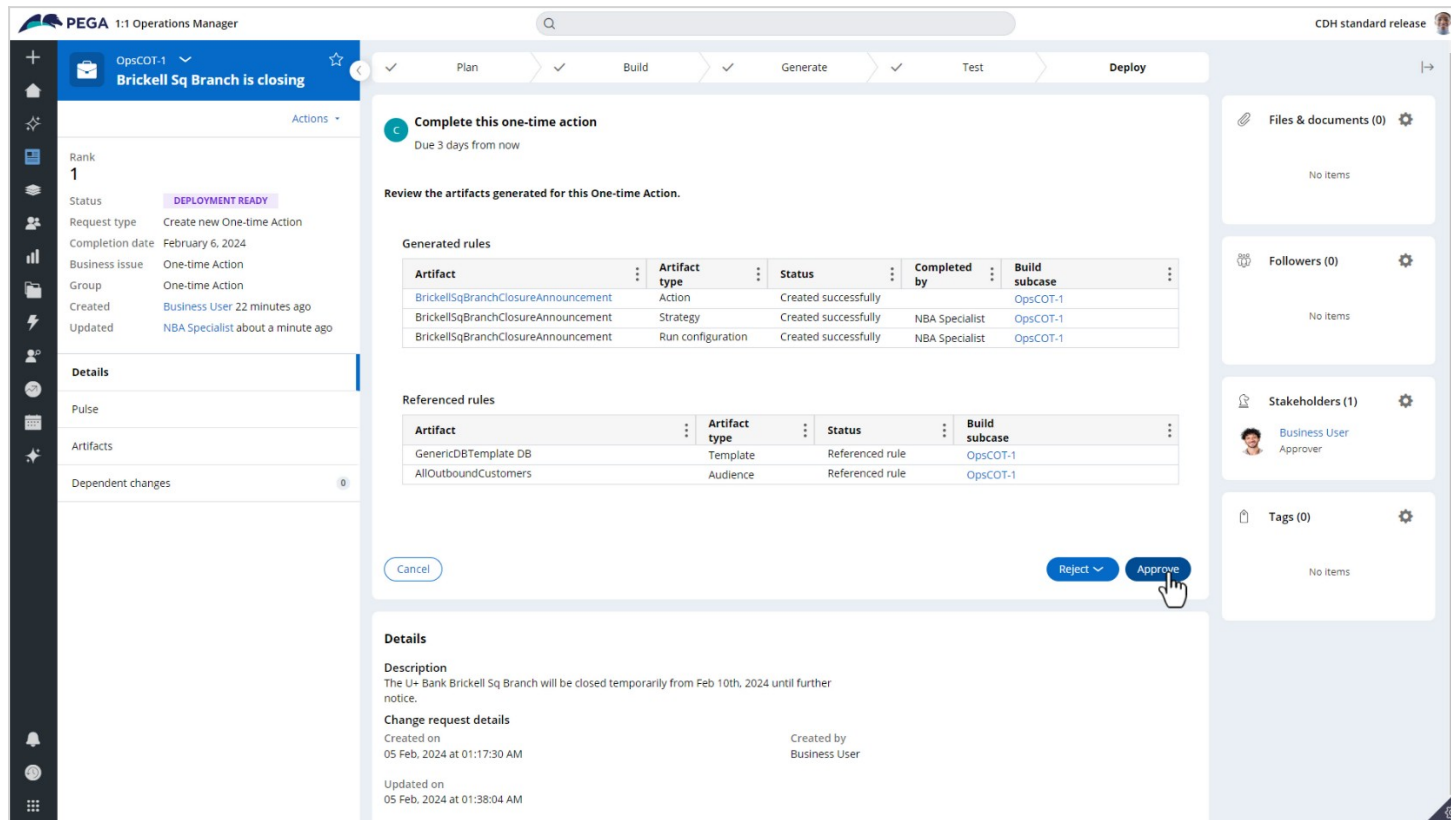
Eligibility	--	Identifier	Brickell_Sq_Branch_closure_announcement_Email
Treatment	Brickell Sq Branch closure announcement Email	Key code	OTAA
Language	English	DB template	--
Template type	DB	Offer message	Dear valued U+ Bank Customers.
Subject line	Brickell Sq Branch is closing!!!		We regret to inform that the Brickell Sq branch will remain temporarily closed from Feb 10th 2024, until further notice, due to operational maintenance activity.
Headline	Brickell Sq Branch is closing!!!		During this period, please use our online and mobile banking services. For assistance, contact our customer service.
			We apologize for any inconvenience and appreciate your understanding.
			Thank you.
Eligibility	--		

Back Save Finish

Review the time of delivery for the one-time action and finish the task. Then, complete the **Review all completed tasks in build stage** task.

As an NBA Specialist, access the **Test and validate artifacts** task to review and submit the artifacts generated for the One-time action.

Following the submission of updates by the NBA Specialist, log in again as a Team Lead to approve the updates and promote them for deployment.



The final step in the process is for the Revision Manager to deploy the changes to production.

After the one-time actions are deployed to production, the communication is sent out according to the delivery time defined during the creation of the action.

You can monitor the deployment and run status of the schedules in the Outbound Schedules landing page within 1:1 Operations Manager. The Outbound Schedules landing page provides an overview of all outbound schedules, including both always-on and one-time action schedules.

PEGA 1:1 Operations Manager

Outbound schedules

> Primary schedule: All issues / All groups(Customer) NOT DEPLOYED - DRAFT

One-time action scheduled runs

Upcoming runs

Deployment status	Status	RunID	Action	Channels	Audience	Scheduled send date	Actual send date	Completed date	Initiated
DEPLOYED	SCHEDULED		Brickell Sq Branch closure announcement	Email	All outbound customers	2/7/24 1:31 AM			

Completed runs

Display past 30 days

Deployment status	Status	RunID	Action	Channels	Audience	Scheduled send date	Actual send date	Completed date	Initiated
No One-time Action runs									

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

1. How to create a one-time action in 1:1 Operations Manager.
2. How to define attributes for the one-time action, including setting the audience using segments.
3. How to monitor the deployment and schedule run status of one-time actions in 1:1 Operations Manager.