Business Agility in 1:1 Customer Engagement

STUDENT GUIDE

PEGA Academy

This document is the property of:
Pegasystems Inc.
1 Rogers Street
Cambridge, MA 02142
Phone: (617) 374-9600
Fax: (617) 374-9620
www.pega.com

Mission: Business Agility in 1:1 Customer Engagement

Product: Pega Customer Decision Hub™ ’26

URL: Business Agility in 1:1 Customer Engagement | Pega Academy

Date: 06 August 2026

Contents

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.

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.

- 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 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™.

Business changes are small, day-to-day updates made as part of normal business operations. 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 in Pega 1:1 Operations Manager

Introduction

In today's experience-driven world, organizations must be able to respond quickly to changing customer needs. In Pega Customer Decision Hub™, this agility is enabled by the Business Operations Team - a cross functional group working inside the Business Operations Environment (BOE) - their mission is simple but powerful: deliver the right action, to the right customer, at the right time, across all channels.

What the Business Operations Team Does

The Business Operations Team is responsible for implementing, managing, and continually improving business-as-usual change requests. These changes include updating actions, adjusting treatments, refining policies, and managing the logic behind Next-Best-Action decisioning.

To support consistent, intelligent customer engagement, the team focuses on several key goals:

1. Increasing agility in change management.
2. Responding rapidly to changing customer needs.
3. Enabling safe updates with minimal technical complexity.
4. Delivering changes reliably into production.

Key Roles in the Business Operations Team

A high-performing Business Operations Team consists of several roles, each with a distinct function:

Business User provides strategic context and submits business requests.

Main responsibilities:

- Creating new change requests, such as new offers, updates, and bulk changes.
- Providing business objectives, audience details, and descriptive content.
- Collaborating with the Team Lead on priorities and timelines.

Team Lead guides and orchestrates the Business Operations workflow.

Main responsibilities:

- Triaging and prioritizing change requests.
- Maintaining a healthy, up-to-date backlog.
- Approving requests and assigning work to Next-Best-Action Specialists or Next-Best-Action Designers.

Next-Best-Action Specialist implements and tests business changes at scale in 1:1 Operations Manager.

Main responsibilities:

- Building and updating Actions and Treatments.
- Configuring channels, and eligibility rules-code tools.
- Ensuring that content adheres to brand guidelines and business objectives.

Next-Best-Action Designer shapes the underlying logic of Next-Best-Action decisioning in Customer Decision Hub.

Main responsibilities:

- Configuring and maintaining NBA Designer settings.
- Designing and updating:
    - Taxonomy,
    - Engagement policies,
    - Arbitration logic,
    - Real-time containers and channel configurations.
- Implementing strategy extensions without modifying the core framework.

Revision Manager manages larger changes that require structured governance.

Main responsibilities:

- Creating and governing revisions that impact decision rules or underlying artifacts.
- Coordinating review, approval, and deployment processes.
- Ensuring quality control

Communication in the Business Operations Team

Successful collaboration within the Business Operations Team depends on a structured workflow that ensures clear communication and smooth hand-offs between roles. The revision management system in Pega 1:1 Operations Manager signals when each team member needs to take action in the process. When a Business User creates a change request, the system notifies the Team Lead to review, approve, and triage the request to an NBA Specialist or NBA Designer, who are responsible for building and testing the revision. Once the work is complete, the system notifies the Team Lead or Revision Manager that the revision is ready for approval and deployment. This automation clearly defines ownership and next steps throughout the process.

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

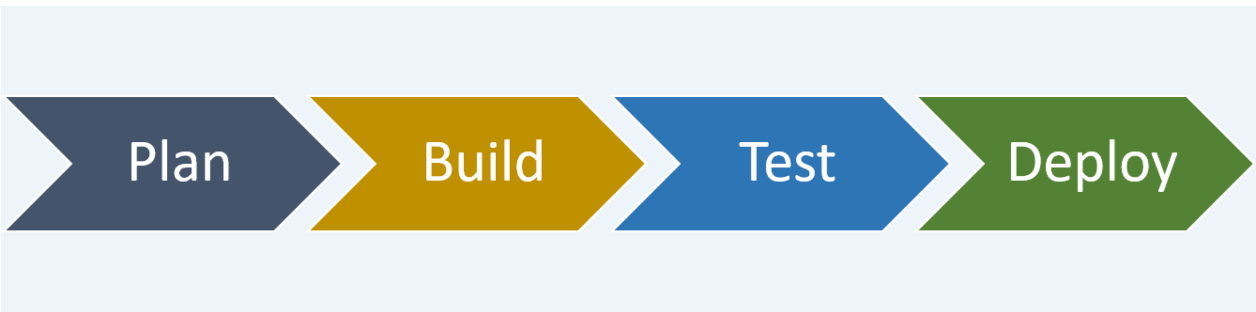
- The main roles of the Business Operations Team
- The main responsibilities of the Business Operations Team members.
- The main goals of the Business Operations Team.

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:

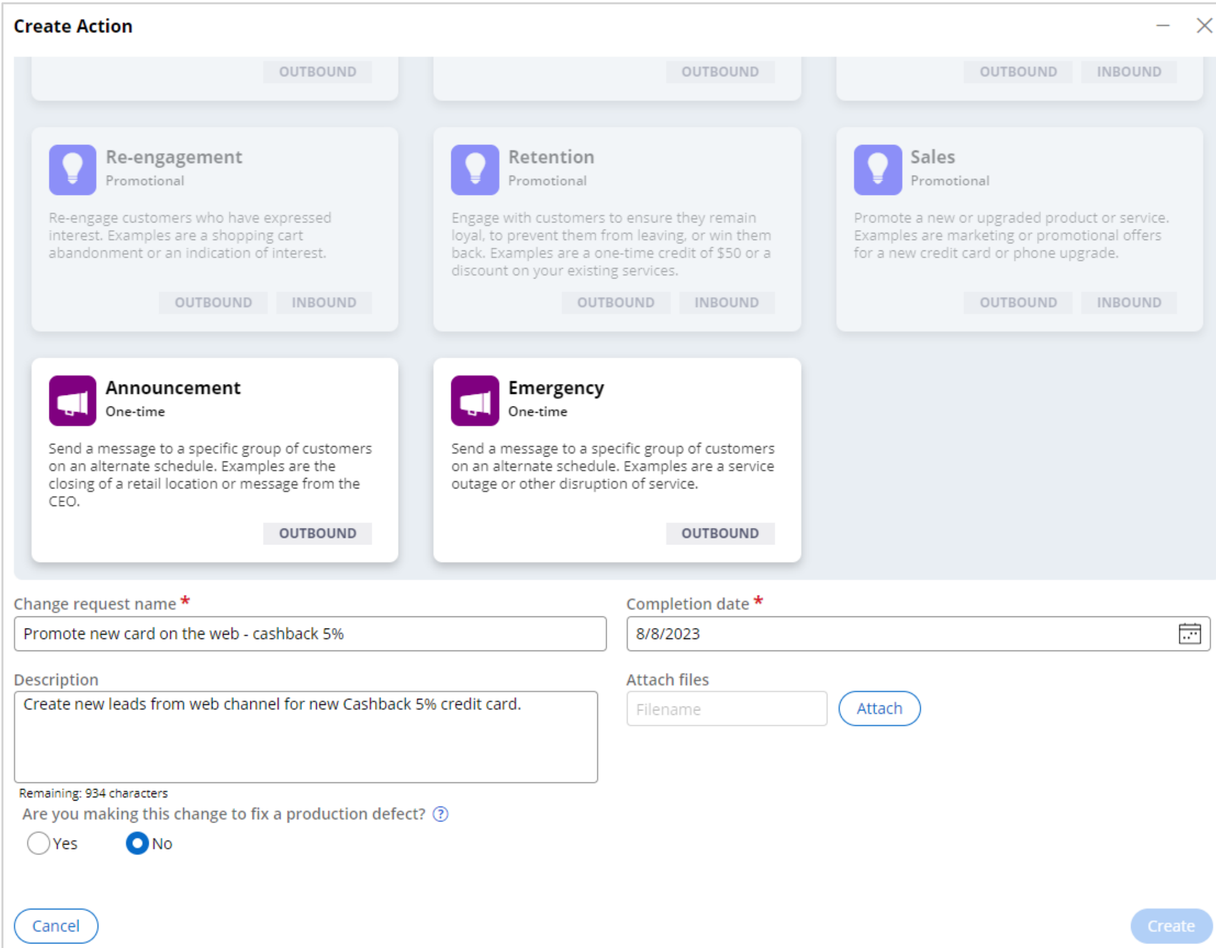
- High-volume day-to-day business changes, such as creating new actions and treatments, and updating existing action and treatment details.
- Low-volume changes such as changes to taxonomy, arbitration, and group-level contact policies.

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.

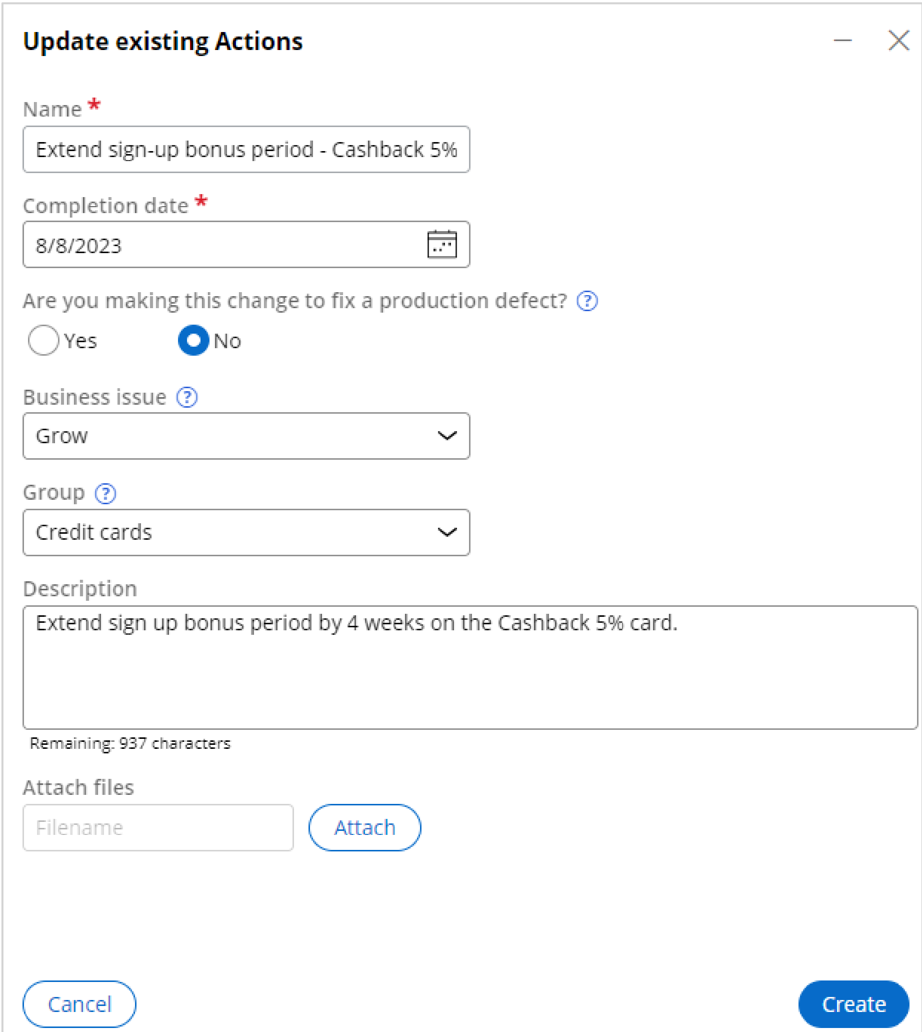
Create new action

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

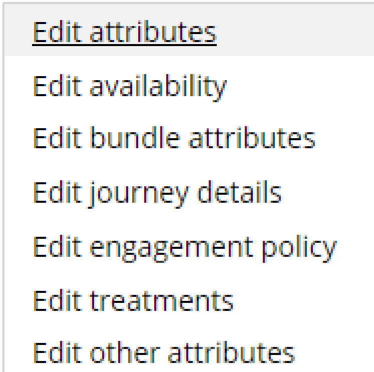


Update existing action

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

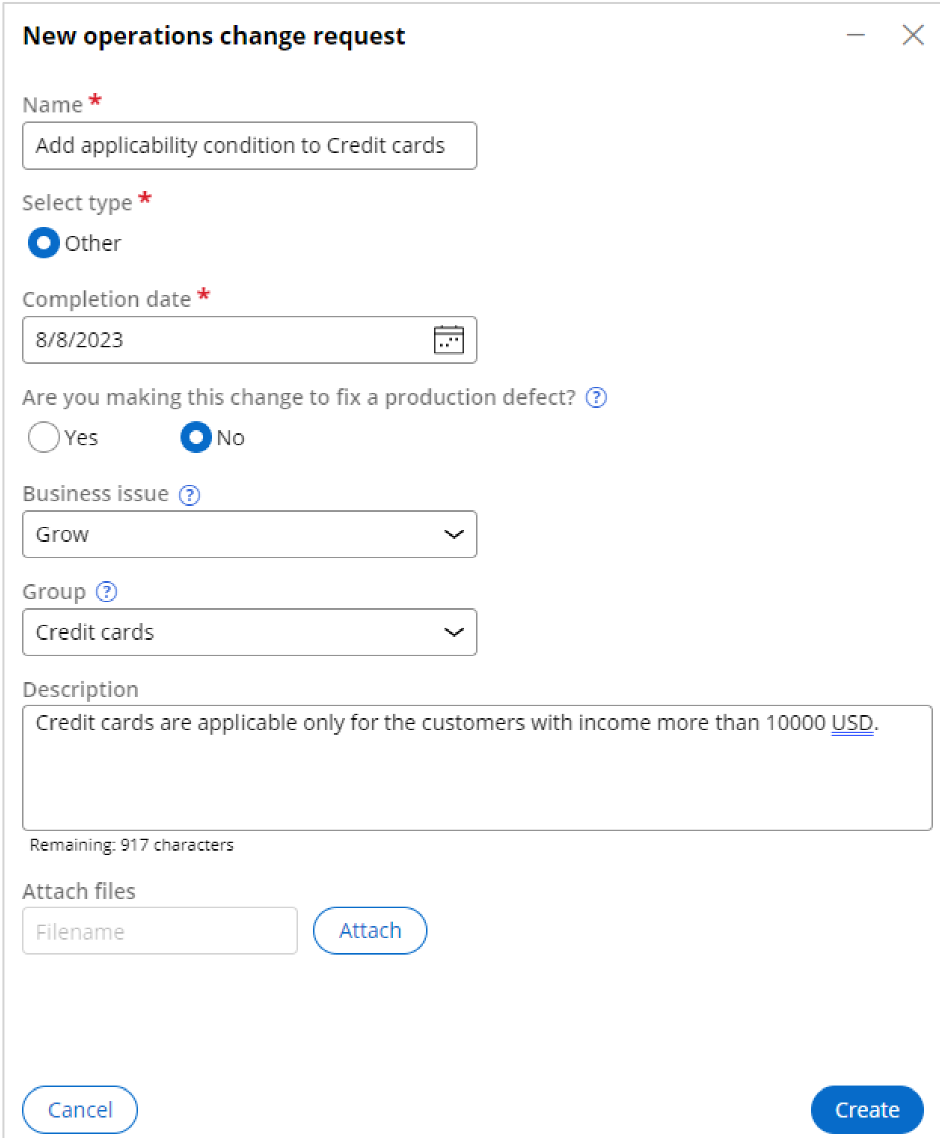


As part of updating an existing action, you can request one or more changes at the action level. The available tasks enable you to add a new treatment, modify the action-level engagement policy and modify the action details.

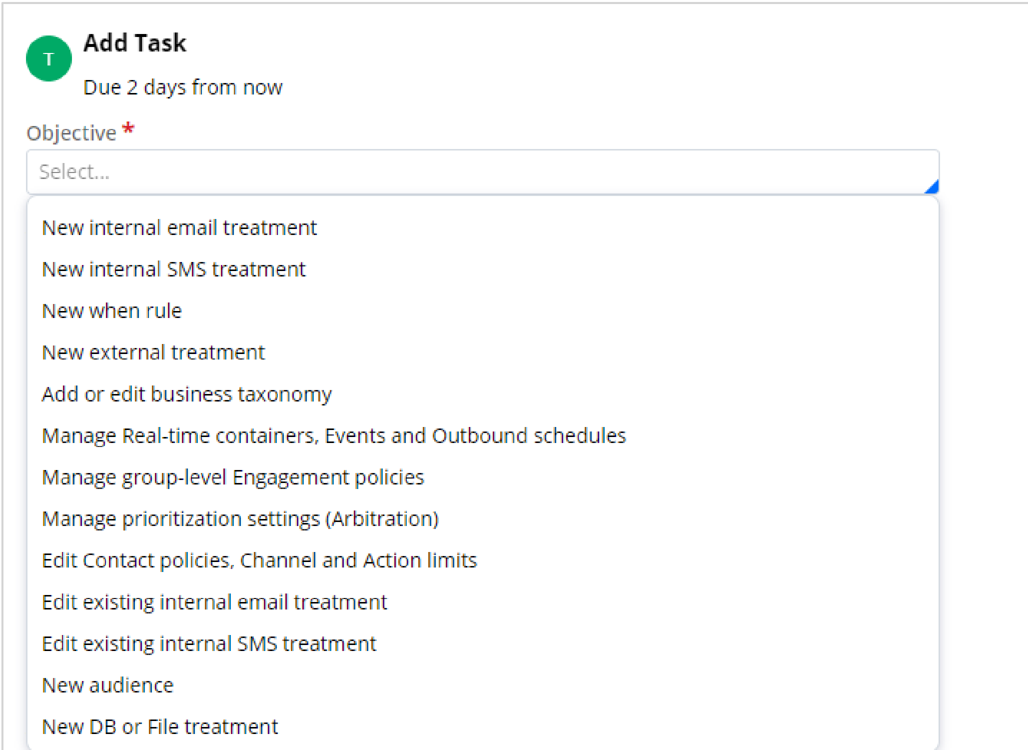


Request type Other

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.

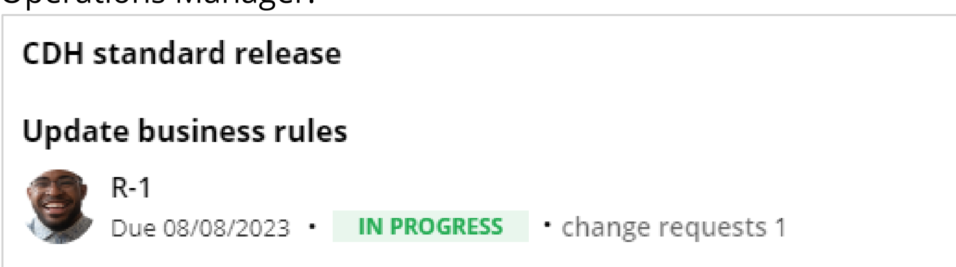


A change request with **Other** as its category is assigned to a team lead, who then adds one or more tasks from the predefined list of objectives according to the business requirement. These tasks are typically assigned to an NBA designer.

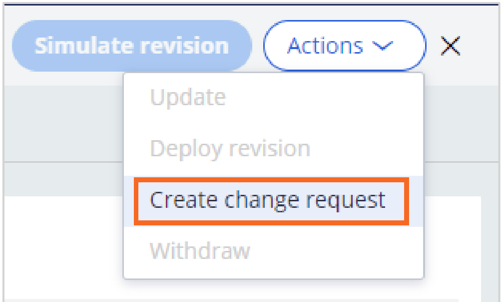


Revision Management

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.



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.

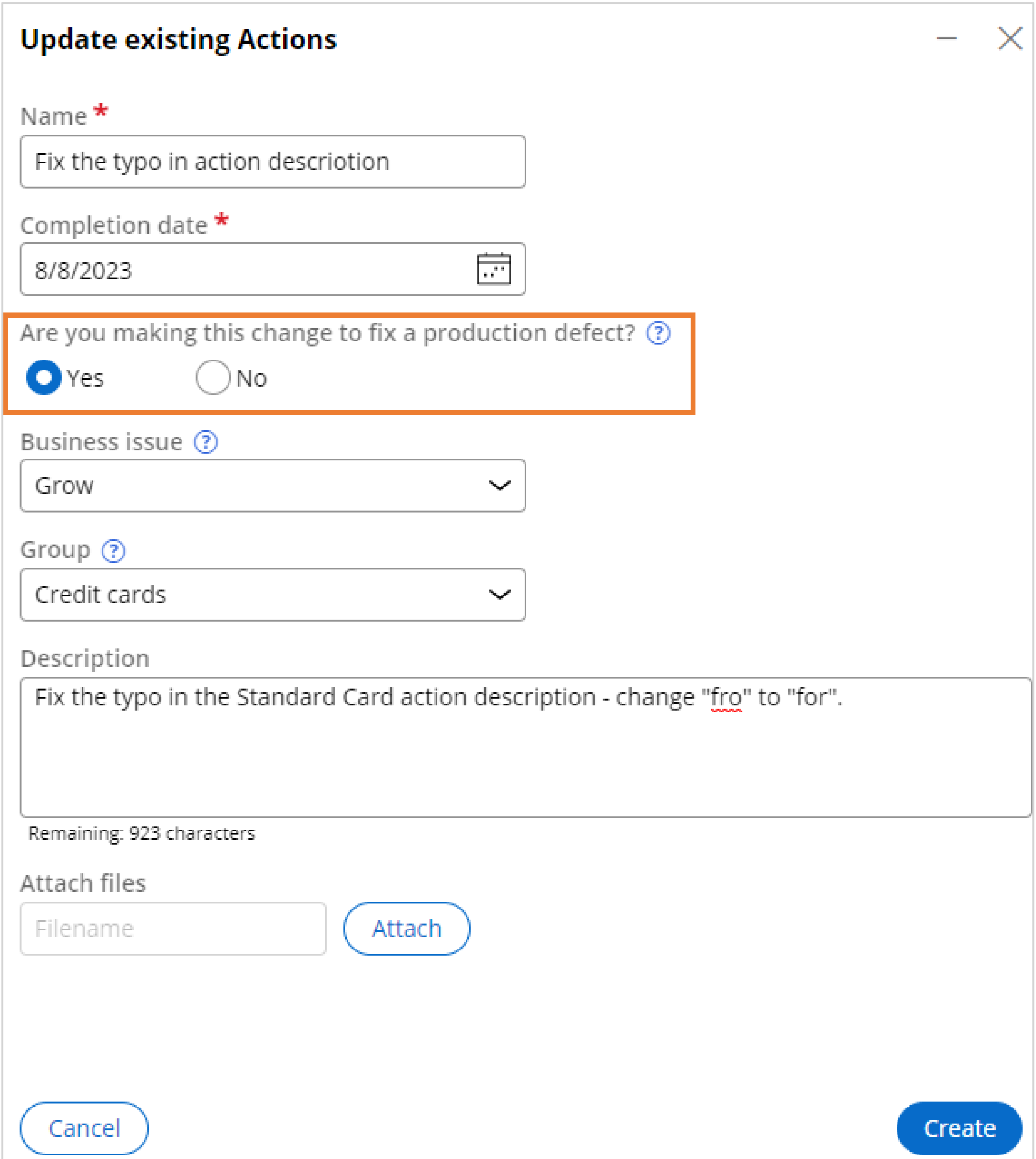


Fast-track change request

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.



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.

Brand Voice Management with Pega GenAI™

Description

In this module, learn about the importance of a brand's voice in today's competitive market and how it reflects a company's personality and values. Explore how to choose the right brand voice by aligning tone and style with the company's values and customer expectations. Additionally, discover how Pega GenAI™ can help create highly personalized marketing treatments that adhere to your brand voice and style guidelines. The module will guide you through the process of setting up global directives and creating a brand voice using the Pega 1:1 Operations Manager portal.

Learning objectives

- Define and implement global directives to maintain a consistent brand voice across all communications.
- Create and submit a brand voice change request in Pega 1:1 Operations Manager.
- Utilize Pega GenAI™ to generate personalized, compliant content that aligns with your brand's voice and style guidelines.

Brand Voice

Transcript

In today's competitive market, a brand's voice is vital – it reflects the company's personality and values, and shapes communication and relationships. But what is brand voice? It is the unique tone and style that convey a company's core values in every message. Whether you aim to convey trustworthiness, friendliness, innovation, or a sense of community, consistency and authenticity are key.

Choose the right brand voice by aligning the tone and style with the company's values and customer expectations. A strong brand voice aids in clear communication and strengthens the overall brand identity. Use the brand voice to define brand guardrails and establish core values and tone that align with the brand and create comprehensive style guidelines. These guidelines serve as a blueprint for the brand, ensuring every piece of content speaks in the same voice.

Pega GenAI™ helps you create highly personalized marketing treatments. By using data-driven insights, Pega's GenAI™ tools can tailor your messages to resonate with specific segments of your audience, ensuring relevance and engagement. With generative AI, you can automate the creation of content that adheres to a specific brand voice and style guidelines. Pega GenAI analyzes vast amounts of data to generate content that is consistent and personalized for the audience. The system, then checks for compliance with brand guidelines, ensuring that all content meets established standards.

Pega 1:1 Operations Manager provides a Brand Voice landing page to integrate the distinct voices that you create, generated through analysis of existing materials or manual crafting, to enhance content authenticity. Best practice is to define brand guidelines for tone and style across all communications by using Global Directives. These directives serve as the foundation for maintaining a consistent brand voice, ensuring that all content reflects the company's values. The brand voice applies these global directives to establish a unique and authentic tone, so that businesses can enhance customer engagement, build trust, and differentiate themselves in a competitive market.

Using the Brand Voice landing page, you can:

- Set global directives, update global directives, and view existing directives.
- Create your brand voice and view existing voices.

    - Test drive your voice.

You have reached the end of this video. What have you learned?

- A brand's voice reflects its personality and values, which is essential for clear communication and strong brand identity.
- Pega GenAI creates personalized, compliant content using data-driven insights, automating adherence to brand voice and style guidelines.
- The Brand Voice landing page helps you set and update global directives, create and test brand voice, ensuring consistent and authentic communication.

Creating Global directives

Define brand guidelines for tone and style across all communications by using Global Directives. Global directives serve as the foundation for maintaining a consistent brand voice, ensuring that all content adheres to the guidelines outlined and coherence and consistency across all communications.

Transcript

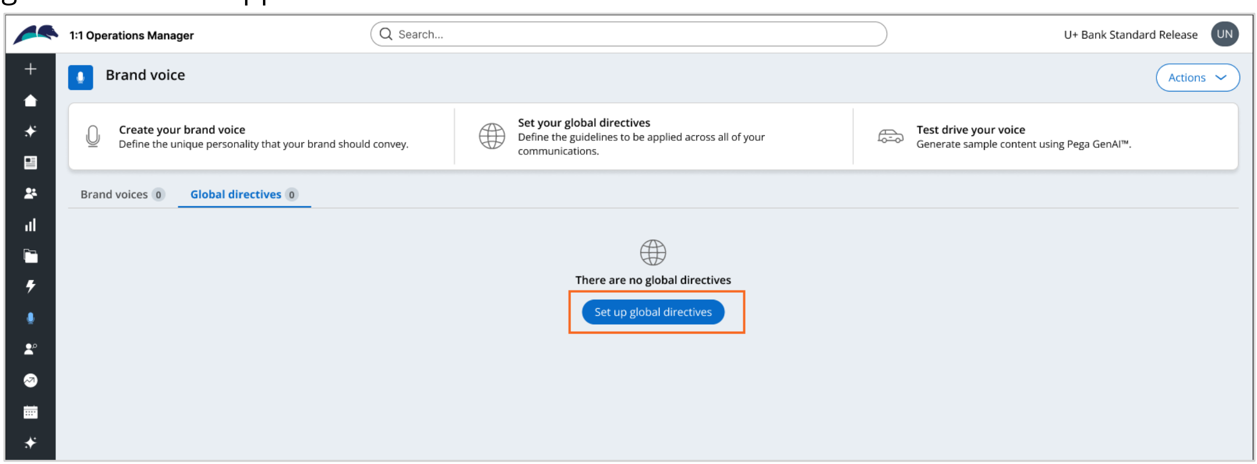
This video shows you how to create and approve global directives for a brand voice.

As a Business User, log in to the Pega 1:1 Operations Manager portal.

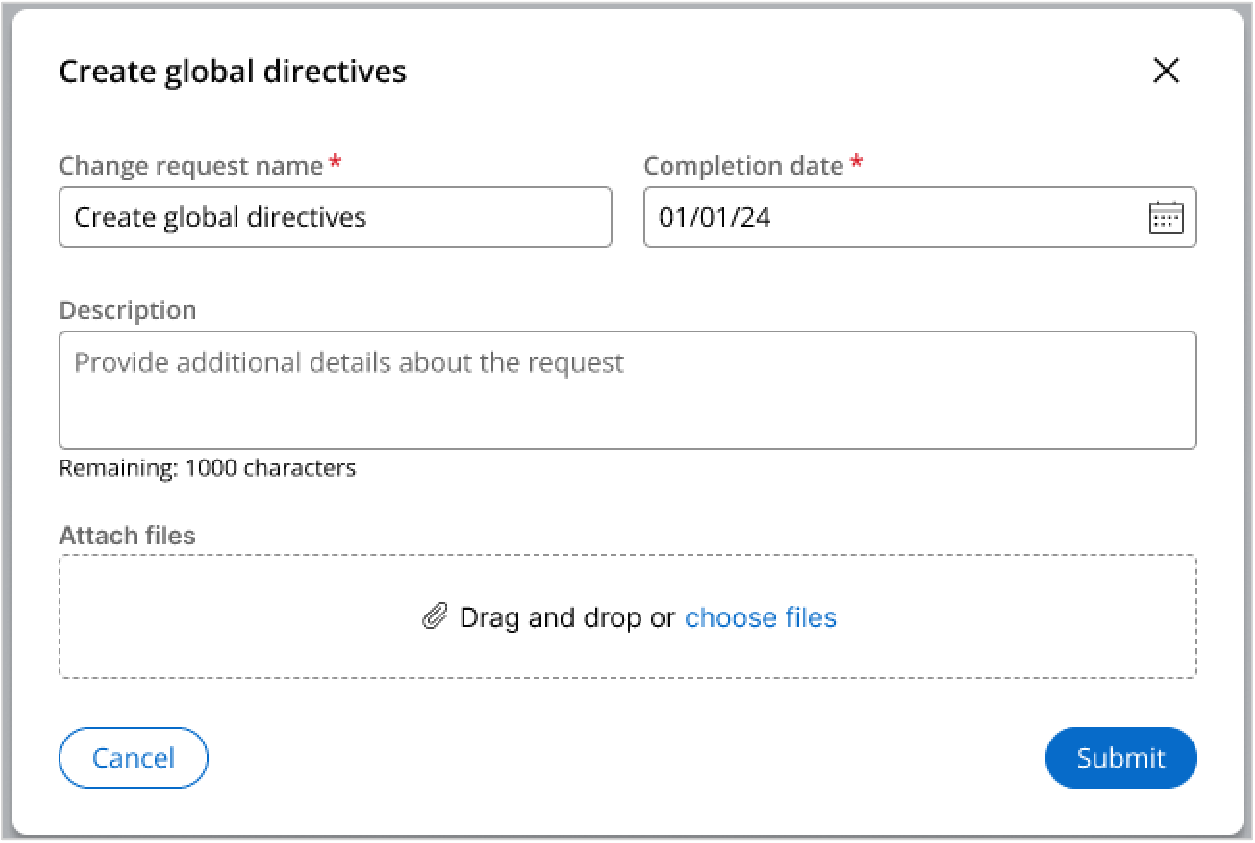
In the navigation pane, click **Brand voices** to open the Brand voice landing page. On this landing page, you can create your brand voice, set up global directives, and test the content generated using Pega GenAI™.

The landing page contains two sections: Brand voices and Global directives.

On the **Global directives** tab, set up some global directives. Global directives define the guidelines to be applied across all communications that use the brand voice.



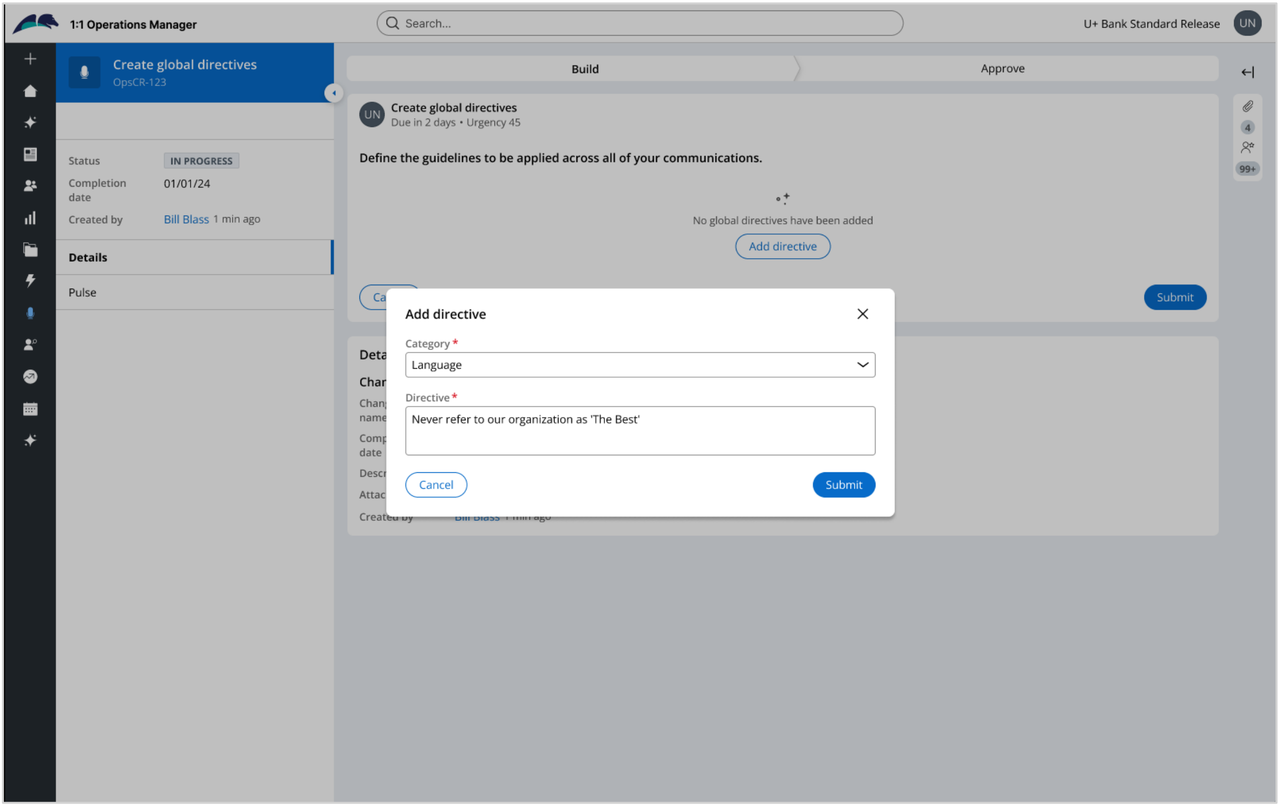
Fill in the **Change request name**, **Completion date**, and **Description** fields to initiate a change request to create a global directive.



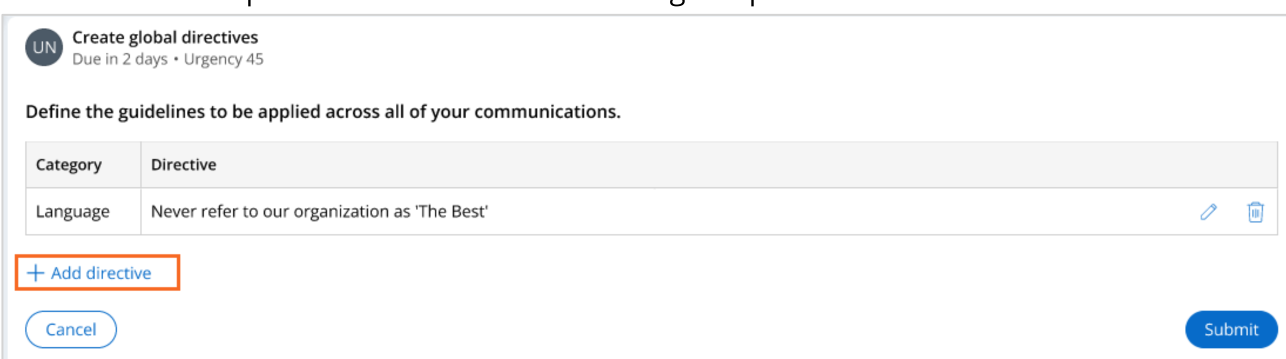
Now, you can add a directive.

There are various categories, such as Style, Grammar, Language, and Compliance for which you can add directives. Select a category for the directive that you want to create.

Next, add the guideline. These guidelines act as the foundation for tone and style to be applied in all communications and maintaining a consistent brand voice.



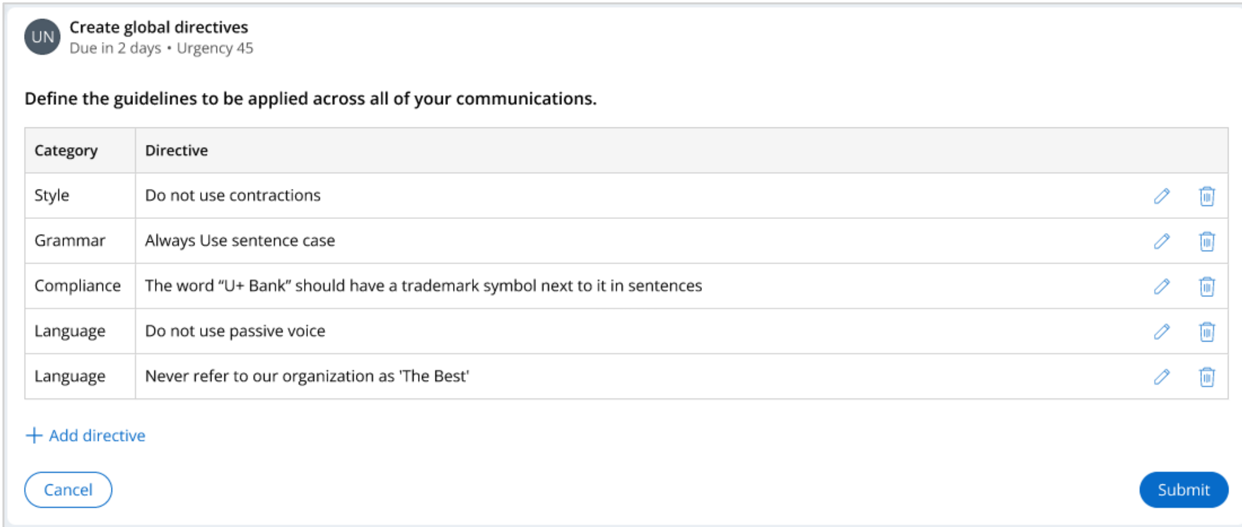
You can add multiple directives to the same change request.



Other directives can include:

- Style: Do not use contractions.
- Grammar: Always use sentence case.
- Compliance: The phrase 'U+ Bank' should have a trademark symbol next to it.

- Language: Do not use passive voice.


UN Create global directives
Due in 2 days • Urgency 45

Define the guidelines to be applied across all of your communications.

Category	Directive
Style	Do not use contractions
Grammar	Always Use sentence case
Compliance	The word “U+ Bank” should have a trademark symbol next to it in sentences
Language	Do not use passive voice
Language	Never refer to our organization as 'The Best'

+ Add directive

Cancel   Submit

You can edit or delete an already added directive.

Once all the required directives are added, click **Submit** to submit the change request.

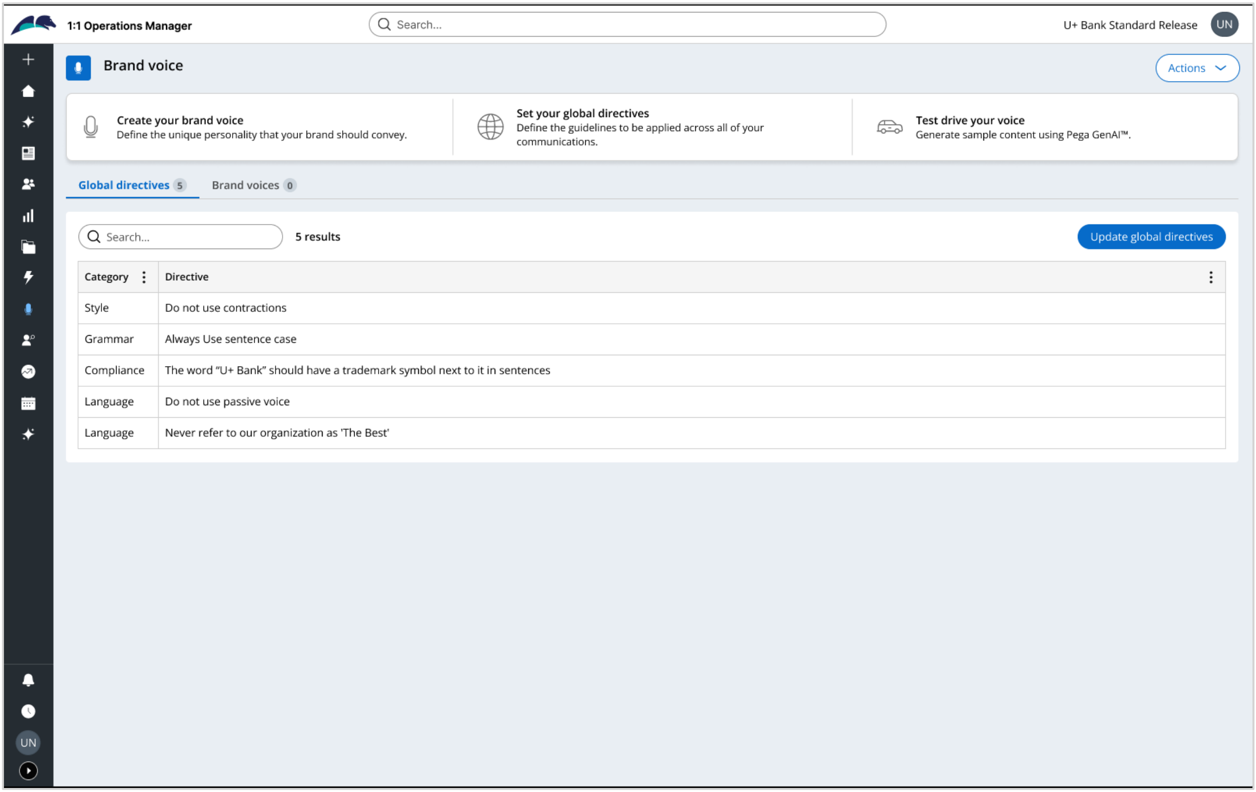
The request is now routed to the Team Lead for approval.

As a Team Lead, log in to Pega 1:1 Operations Manager. The **Approve global directives** task is listed in the **My Worklist** section for the Team Lead’s review.

The Team Lead reviews the global directives and can either approve or reject them.

Rejecting the changes will send the change requests back to the Build stage, where the business user needs to make the required changes and re-send them for approval.

Once the global directives are approved, the change request is complete.
You can now see the approved global directives on the Brand voice landing page. The system uses these directives while formulating the brand voice and any other content that you generate using Pega GenAI, such as Email treatment content.



You have reached the end of the demo. You have learned:

- How to create and approve global directives that define communication guidelines.

Creating Brand voice

A brand voice captures a company's unique tone and style, reflecting its personality and values in marketing content. Integrate the organization’s distinct voice, generated through analysis of existing materials or manual creation, to enhance content authenticity.

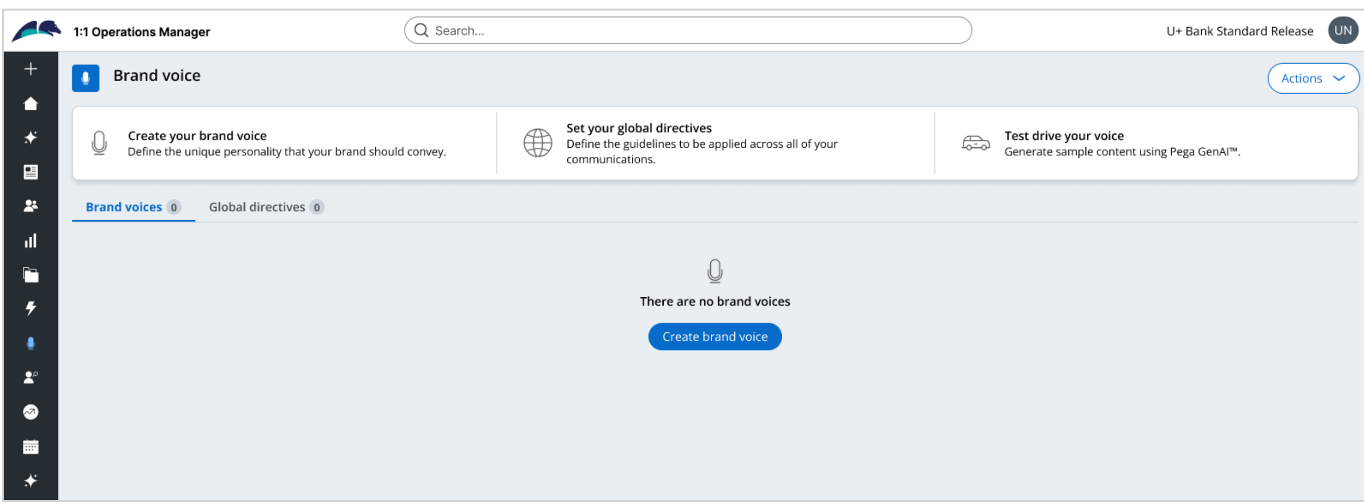
Transcript

This video shows you how to create a brand voice. By establishing a unique and authentic tone, businesses can enhance customer engagement, build trust, and differentiate themselves in a competitive market.

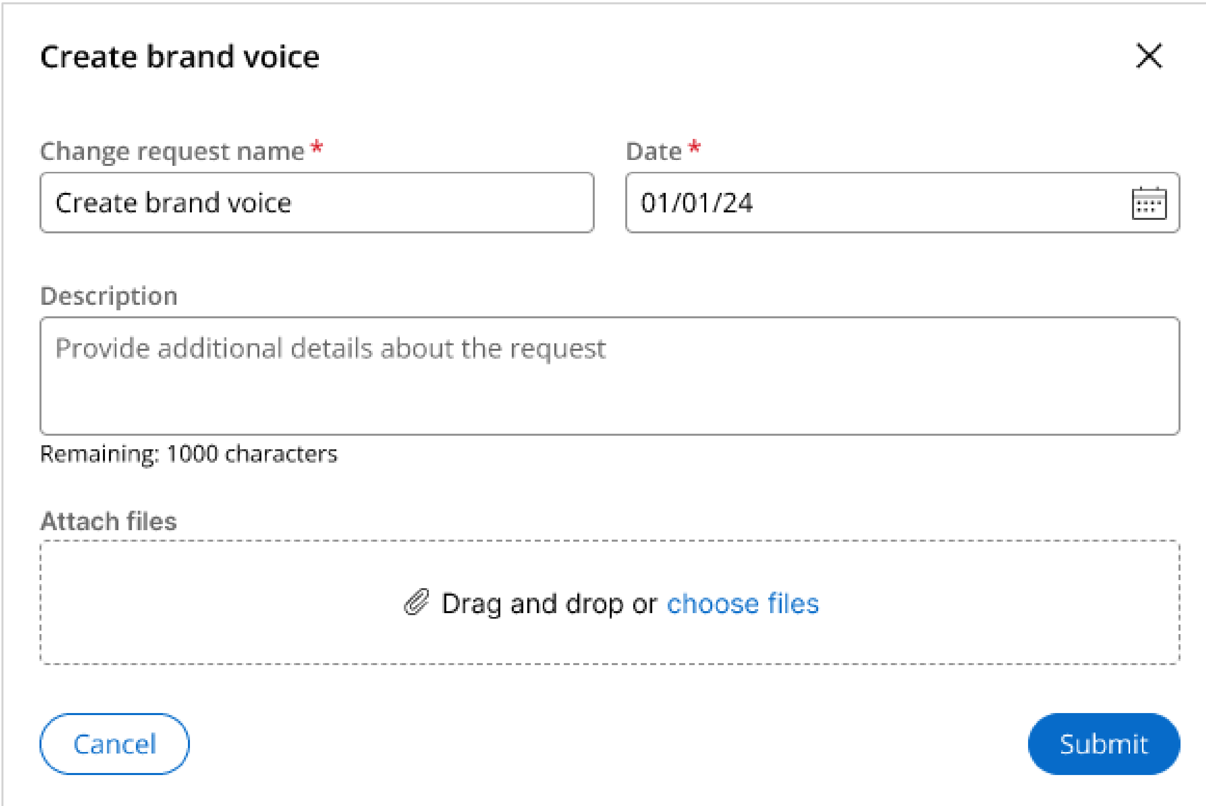
As a Business User, log in to the Pega 1:1 Operations Manager portal.

In the navigation pane, click **Brand voice** to open the landing page.

On the **Brand voices** tab, click **Create brand voice**.



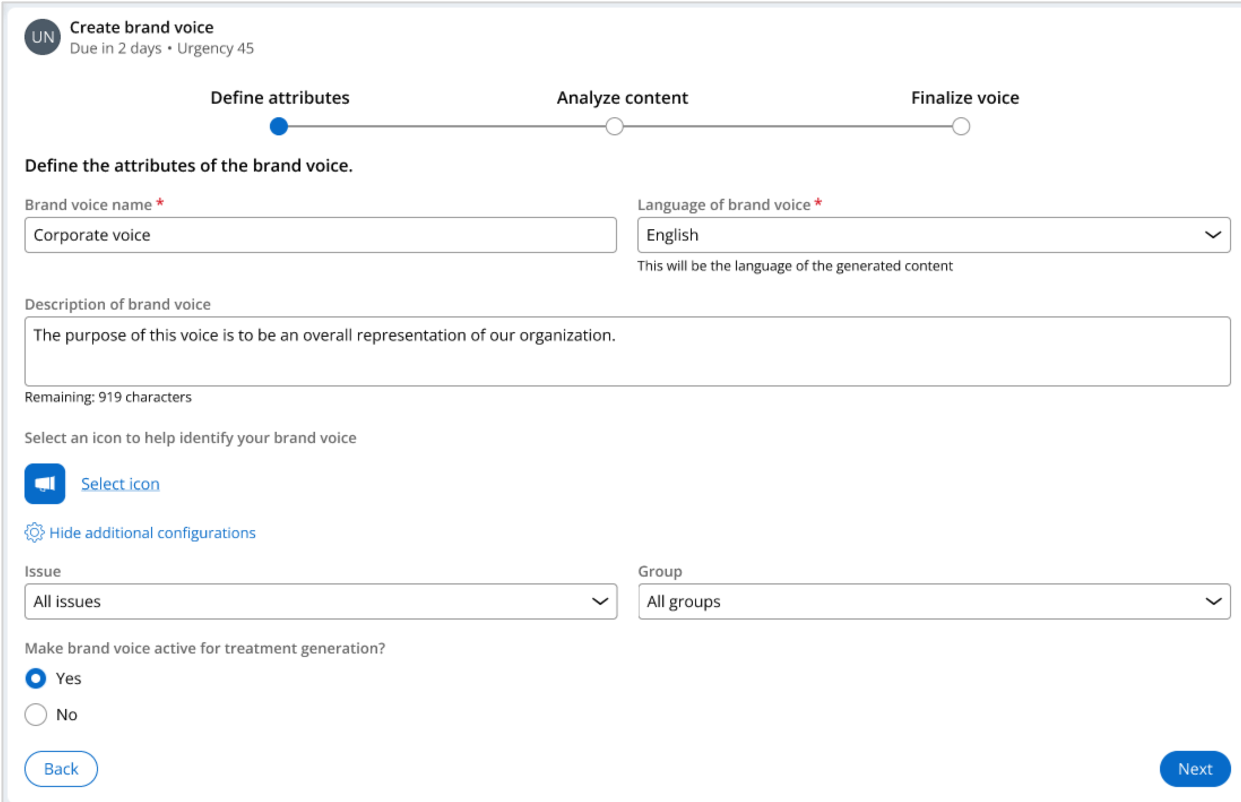
Fill in the **Change request name**, **Completion date**, and **Description** fields to initiate the change request, and then click **Submit**.



In the **Select usage** section, select the Business Issue and Group for which the brand voice will generate treatments. By default, the system considers All Issues and groups if you do not select a business issue and group.

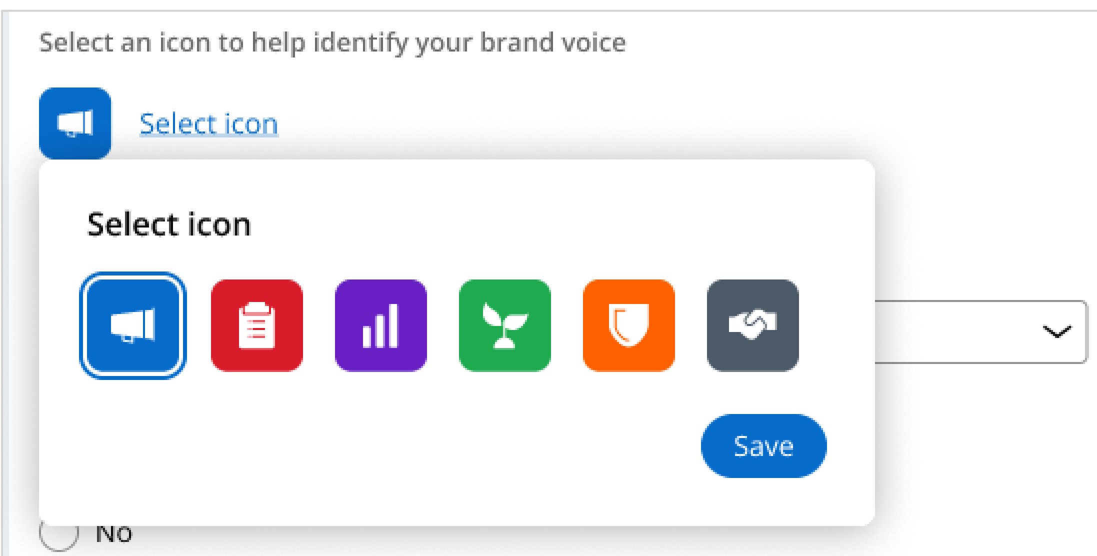
Optionally, if you have multiple brand voices for the same Business Issue and Group, you can set the current brand voice as the default for the specific issue and group.

Choose whether the brand voice should be active for Treatment generation by selecting one of the radio buttons.



In the **Define attributes** step, name your brand voice, and select the language of the generated content. You can also add a brief description about the intended purpose of the voice.

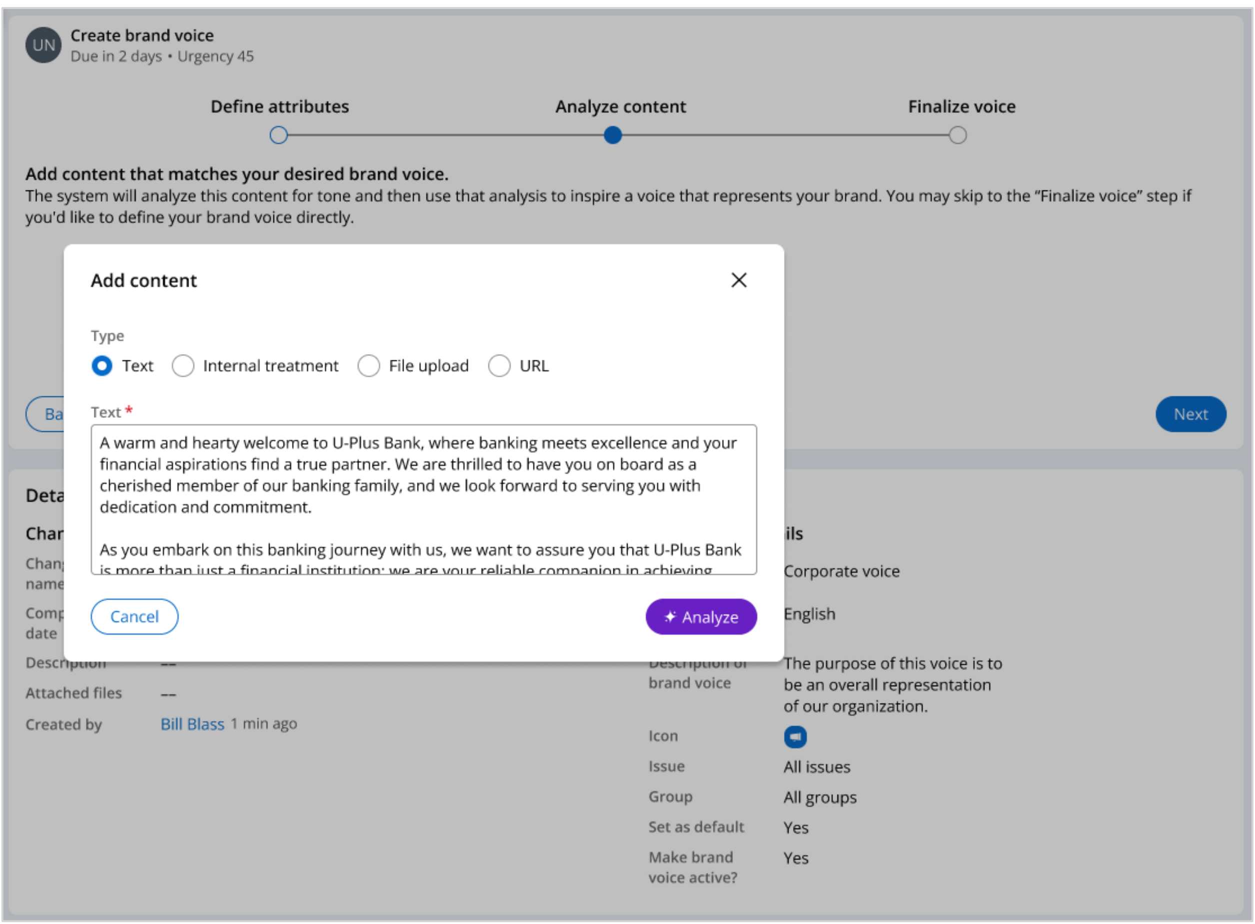
Pick an icon that helps you identify the brand voice.



In the **Analyze content** step, you can add the content that matches the brand voice. The system analyzes the provided content to inspire a voice that represents the brand. For analysis and inspiration, you can select:

- **Text** - Any text content that represents that brand, such as marketing emails, company mission statements, social media posts, and so on.
- **Internal treatment** – The content of an existing email treatment.
- **File upload** – Upload files that represent the brand. The system supports PDF, DOC, TXT and HTML formats.
- **URL** – URL to the brand's website or an online content folder.

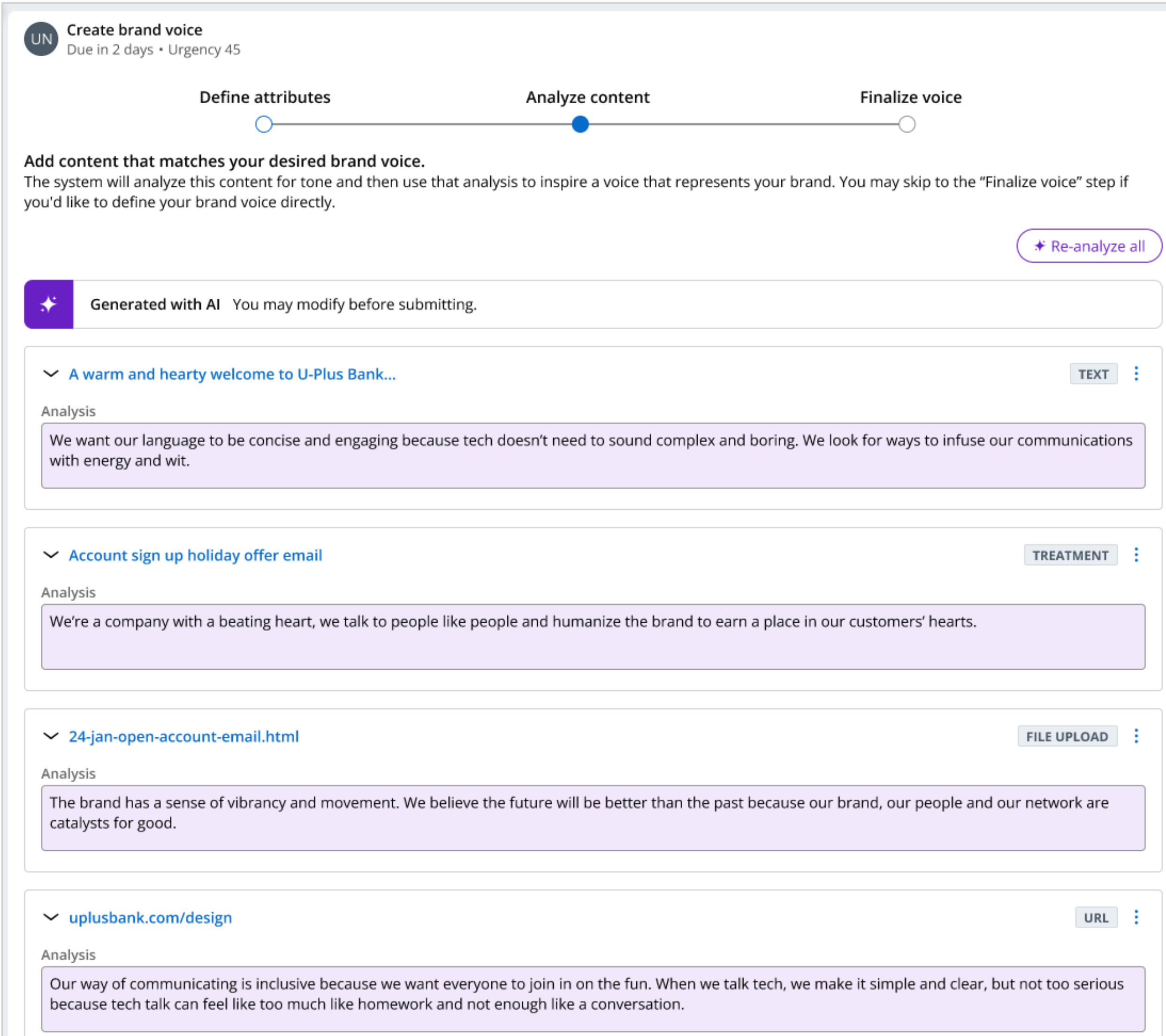
Provide the content and analyze the content.



You can review the generated analysis and update the provided content, if required.

After updating you can reanalyze the content so that the system generates a new analysis.

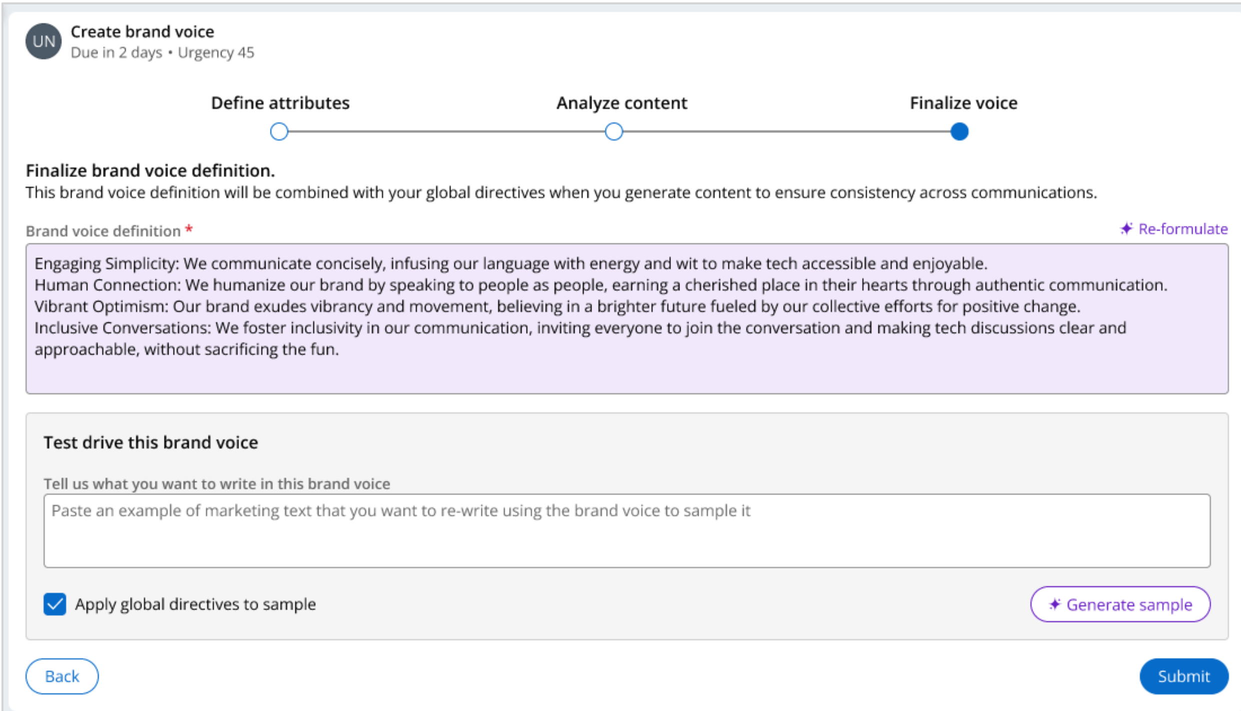
You can add multiple pieces of content to analyze and optionally reanalyze all the content at once. Note that providing content to analyze is an optional step.



Next, in the **Finalize voice** step, review the generated brand voice definition, and if necessary, you can edit it. If there is no content analyzed in the previous step, you can manually provide the brand voice definition.

If you are not happy with the generated definition, you can reformulate and test a different variation of brand voice definition that is generated by AI.

Use the **Test drive your brand voice** section to test the new brand voice in real-time. Enter a prompt and choose whether or not to apply existing global directives and then generate sample content to test the brand voice.



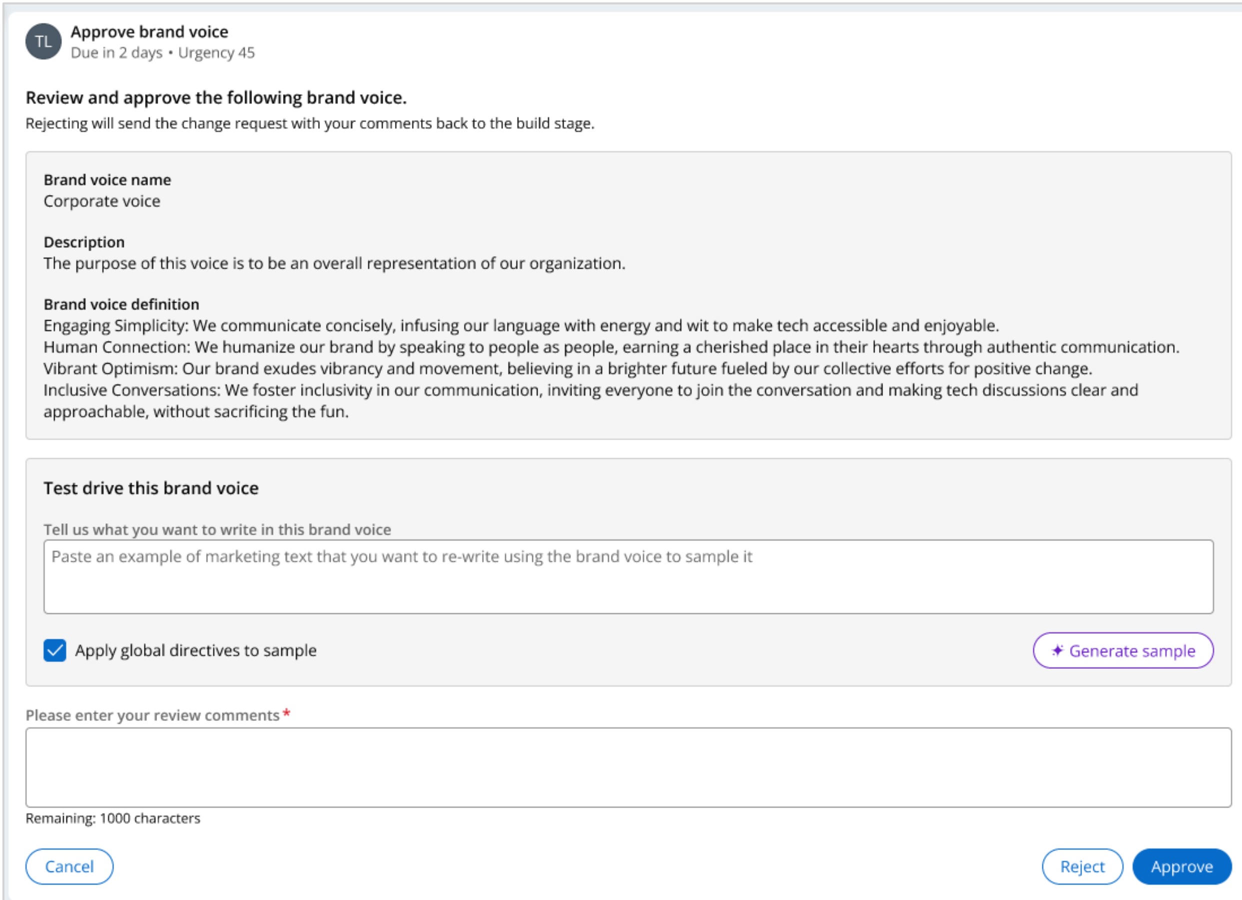
Review the generated content and click **Submit** to submit the change request.

The request is now routed to the Team Lead for approval.

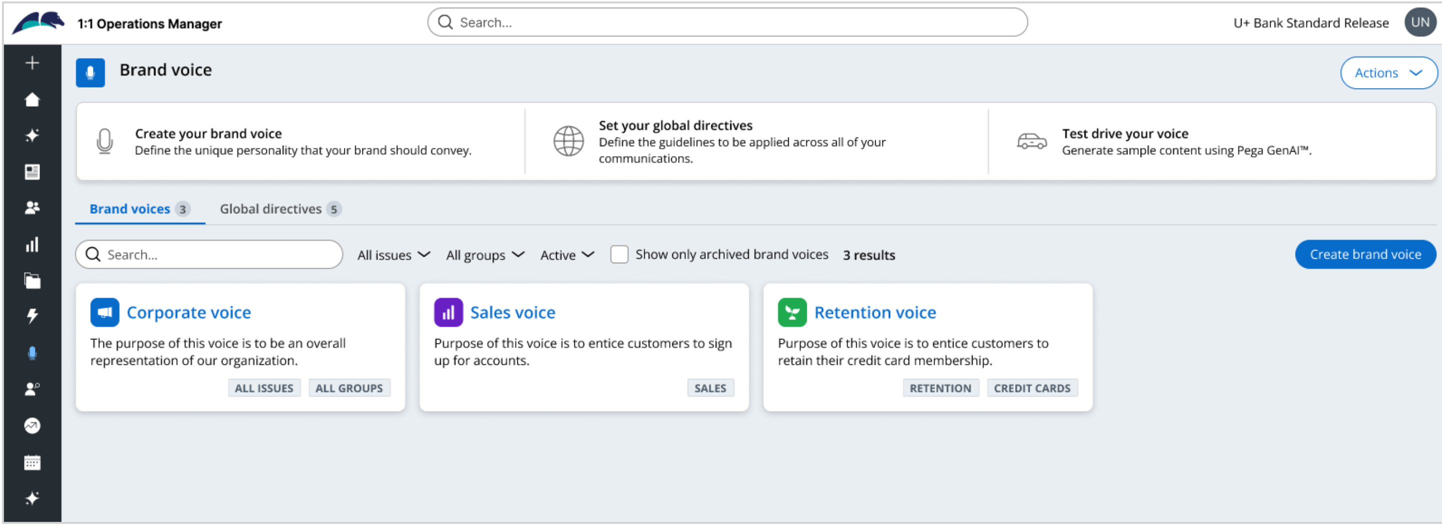
The Team Lead logs in to Pega 1:1 Operations Manager. The **Approve brand voice** task is listed in the **My Worklist** section for the Team Lead's review.

The Team Lead reviews the brand voice and can generate additional sample content to test the brand voice.

They can choose to either approve or reject the brand voice. Rejecting the changes will send the change requests back to the build stage, where a business user must make the required changes and re-send it for approval.



Once the brand voice is approved, the change request is complete.
You can now see the brand voice on the Brand voice landing page. The system will use this brand voice, along with global directives to generate content with a distinct and consistent voice reflecting organization's unique tone and style.



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

1. How to create and submit a brand voice change request in Pega 1:1 Operations Manager.
2. How to analyze and finalize the brand voice content.

Accelerating 1:1 engagement with blueprint import

Description

Learn how to accelerate 1:1 Customer Engagement implementations by importing Customer Engagement Blueprints into Pega Customer Decision Hub™. This module walks you through the end-to-end process—from uploading a blueprint file in 1:1 Operations Manager to mapping strategic elements and generating operational artifacts using Pega GenAI™. You'll explore how blueprint components like Outcomes, Products, Experiences, and Messages are transformed into Issues, Groups, Actions, and Treatments, and how to verify and refine the import for production readiness.

Learning objectives

- Import a Blueprint into Customer Decision Hub

Importing a Customer Engagement Blueprint

Introduction

Explore one of the most powerful features in Pega Customer Decision Hub™: Importing Customer Engagement Blueprints. Whether working with marketing campaigns, customer experience initiatives, or comprehensive engagement strategies, this import capability enables you to transition seamlessly from blueprint design to live customer interactions.

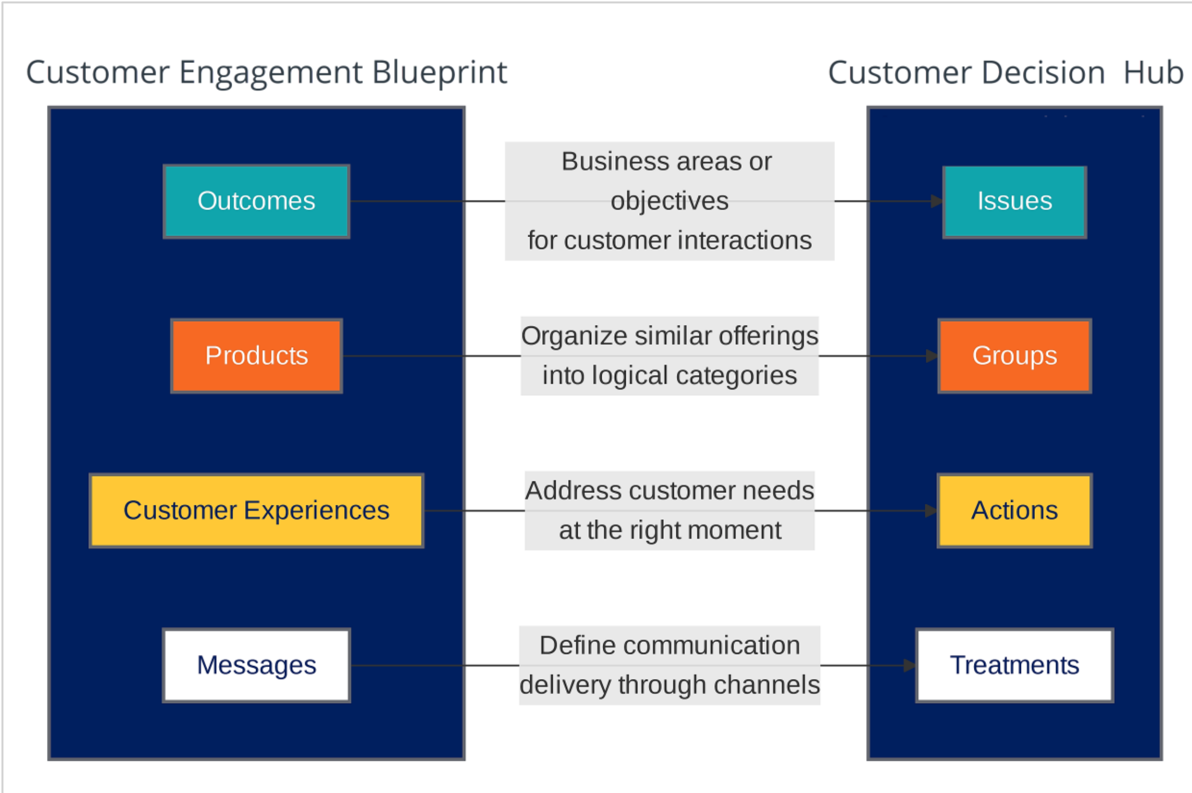
You take a blueprint file and import it directly into 1:1 Operations Manager, where it generates the necessary artifacts to accelerate your 1:1 Customer Engagement implementation.

Understanding Blueprint-to-Hub Mapping

The strategic elements defined in a Customer Engagement Blueprint are systematically translated into operational structures within Customer Decision Hub. This integration uses advanced Pega GenAI™ technology to enhance the design process for customer engagement strategies.

Here is how the transformation works:

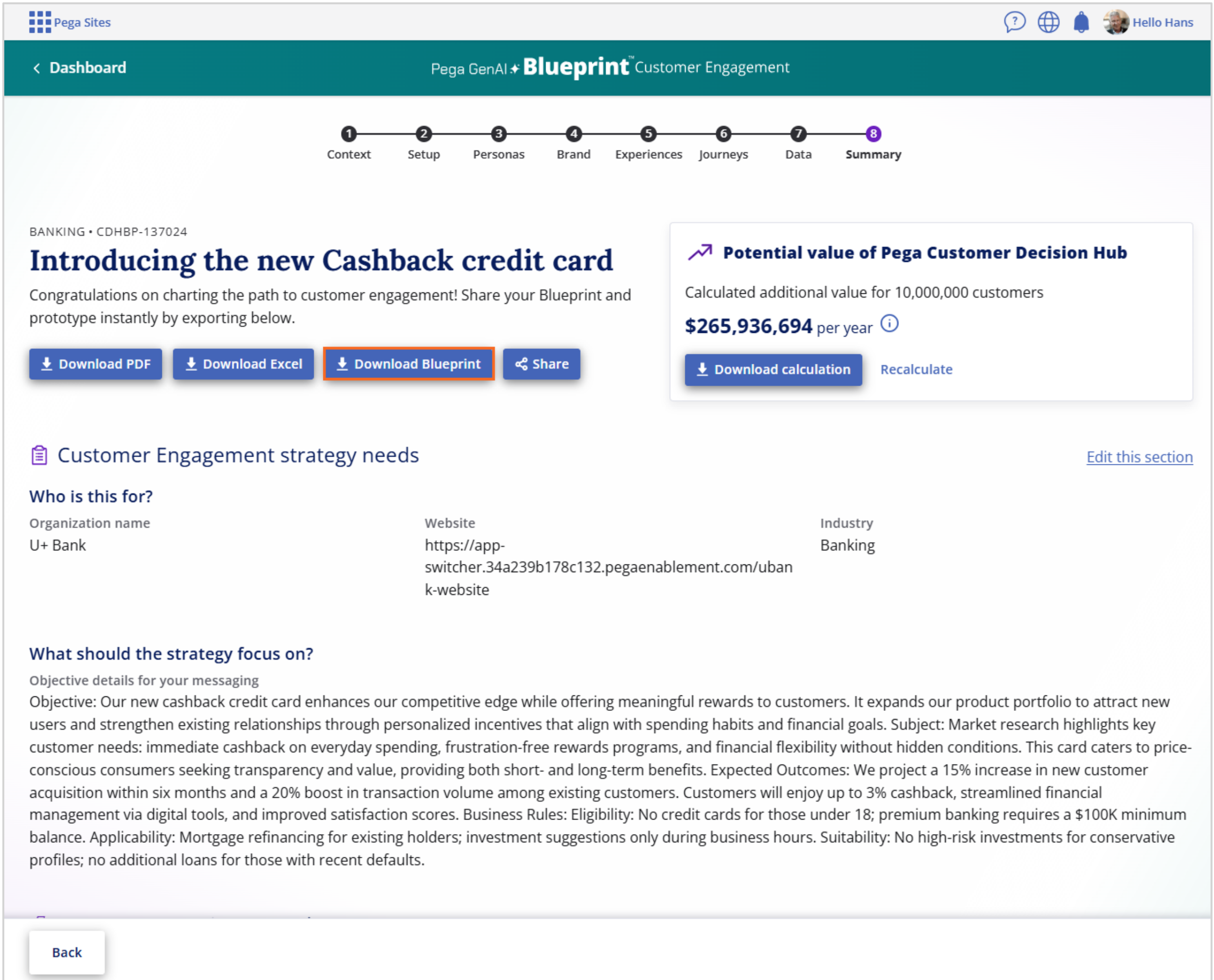
- Outcomes from the Blueprint are mapped to Issues in Customer Decision Hub, representing the business areas or objectives that customer interactions target, for example, retention or growth initiatives.
- Products defined in the Blueprint correspond to Groups in Customer Decision Hub, which organize similar offerings into logical categories for more effective management.
- Customer Experiences outlined in the Blueprint transform into specific Actions within Customer Decision Hub, each designed to address customer needs or opportunities at the right moment in their journey.
- Messages articulated in the Blueprint are implemented as Treatments in Customer Decision Hub, defining how communications are delivered through various channels.



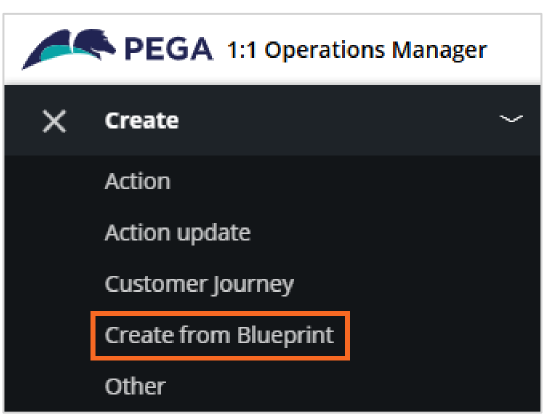
Importing a Customer Engagement Blueprint

To demonstrate the import process, consider this example: U+ Bank wants to introduce a new Cashback credit card to enhance its competitive positioning in the financial services market while delivering meaningful value to customers seeking everyday financial rewards.

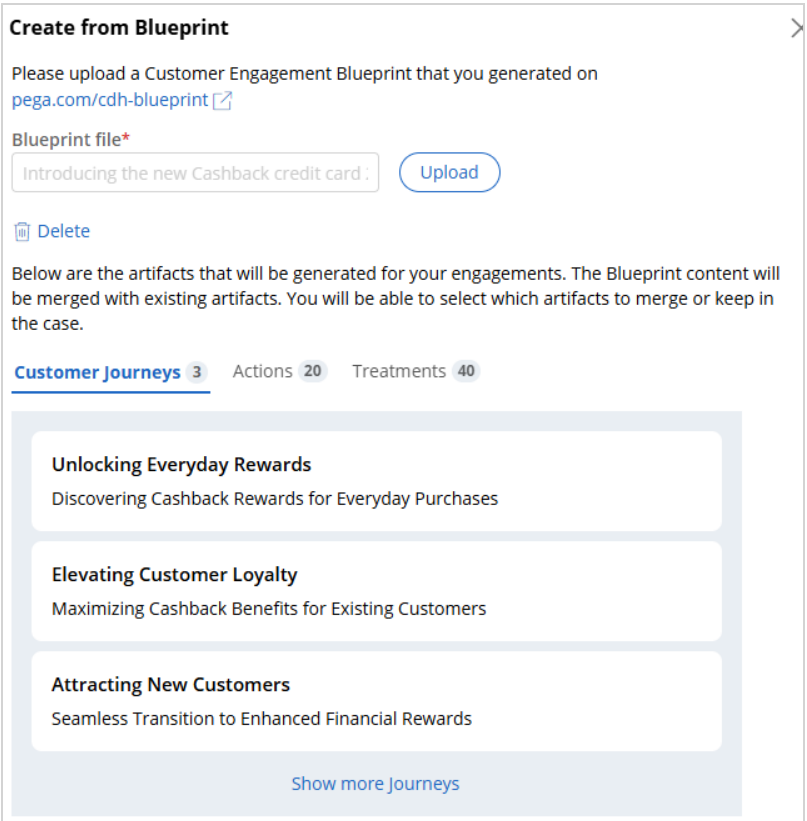
The U+ Bank marketing team has created and downloaded a Customer Engagement Blueprint that contains customer experiences to attract new customers and deepen relationships with existing ones.



When you begin the blueprint import process, you first need to access the 1:1 Operations Manager portal, either as a Business User, Team Lead, or NBA Specialist. Upon selecting the Create from Blueprint option, you'll be presented with a window where you can upload your Customer Engagement Blueprint file.

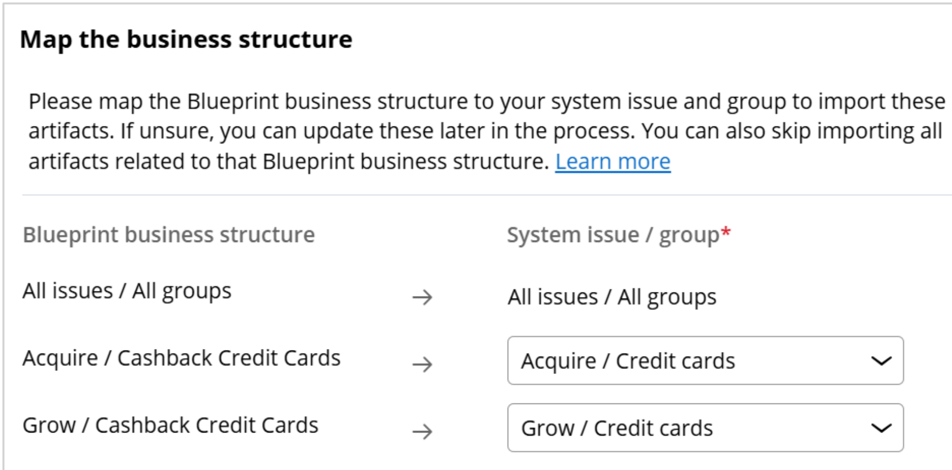


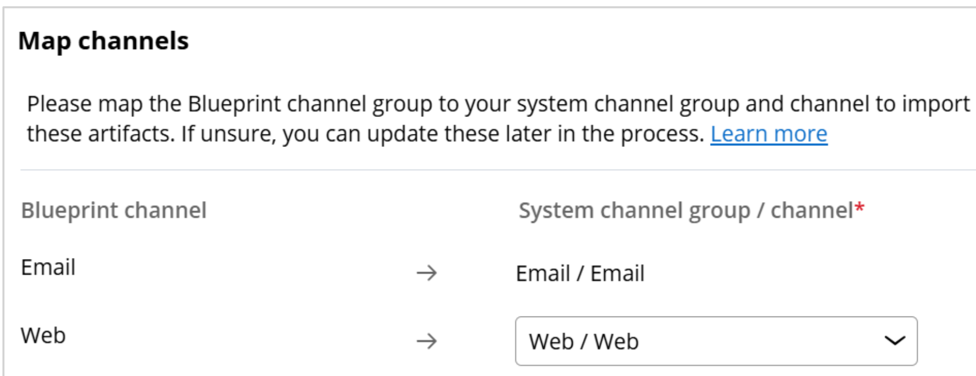
The system processes this file and displays a preview of the assets that will be generated for your engagements. By default, you see three items from each category, though you can expand this view by clicking "Show more" to see additional Actions or Treatments that will be created based on your blueprint.



Mapping the business structure and channels

The mapping stage represents a critical part of the import process. Here, the system presents your blueprint's business structure and channels alongside your existing Customer Decision Hub business structure and channels. This side-by-side comparison allows you to properly align the two environments.

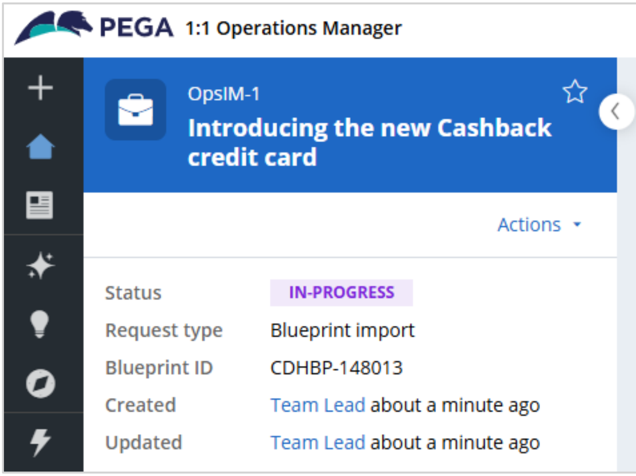




To facilitate this process, the system attempts to automatically map elements where possible, using fuzzy matching to identify potential correspondences. However, you may need to manually adjust these mappings to ensure proper alignment between your blueprint design and implementation environment.

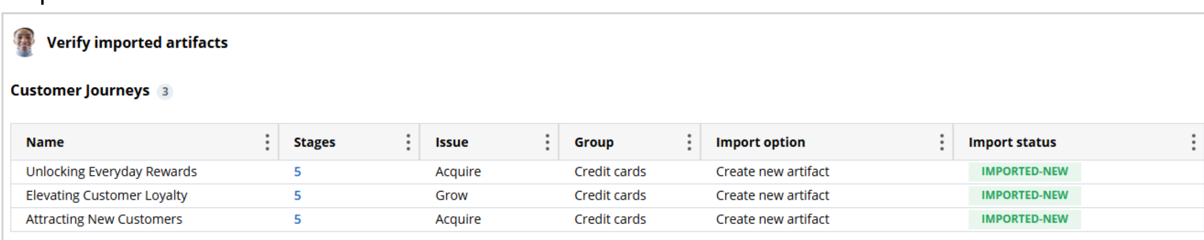
Generating artifacts

When you proceed with the import, the system creates an **Operations Import Management** Case to track the import process. An OpsIM Case is a specialized transformation process, providing full visibility into the progress and maintaining an audit trail of all changes.



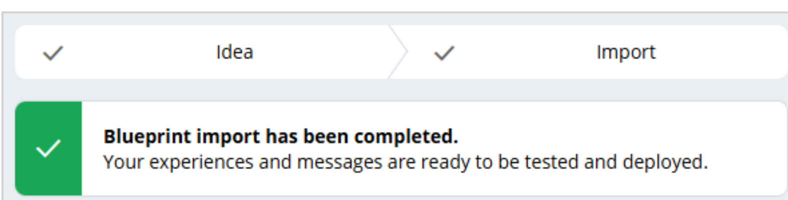
The actual generation of artifacts transforms your blueprint specifications into tangible implementation components. The system creates Journeys, Actions, and Treatments during this phase.

Once artifact generation is complete, you can review the results through a verification task. This step ensures that all imported elements align with your expectations and system requirements.



Name	Stages	Issue	Group	Import option	Import status
Unlocking Everyday Rewards	5	Acquire	Credit cards	Create new artifact	IMPORTED-NEW
Elevating Customer Loyalty	5	Grow	Credit cards	Create new artifact	IMPORTED-NEW
Attracting New Customers	5	Acquire	Credit cards	Create new artifact	IMPORTED-NEW

When verification is complete, submitting the case finalizes the import.



Important Considerations

Post-Import Refinement: The imported artifacts need further refinement before they are deployed to production. Remember that imported elements require customization and optimization based on your specific business requirements and customer engagement strategies.

Revision Management: To minimize disruption for other users, it is recommended to import to a new revision whenever possible. This approach allows you to manage changes effectively and maintain system stability during the implementation process.

Best Practices for Success

To maximize the value of your Customer Engagement Blueprint imports, consider these best practices:

1. **Plan Your Business Structure Mapping:** Before importing, review your existing Customer Decision Hub business structure and plan how blueprint elements should align.
2. **Use New Revisions:** Always import to a new revision to maintain system stability and change management capabilities.
3. **Verify Thoroughly:** Take advantage of the verification step to ensure all imported elements meet your requirements before finalizing the import.
4. **Plan for Refinement:** Budget time for post-import customization and testing before deploying to production environments.

Launching a new offer on the web

Description

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

Discover how to use the power of Pega GenAI™ to simplify your daily tasks in Pega 1:1 Operations Manager.

Learning Objectives

After completing this module, you should be able to:

- Use Automated Insights suggestions.
- 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.
- Create treatments using Pega GenAI.

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

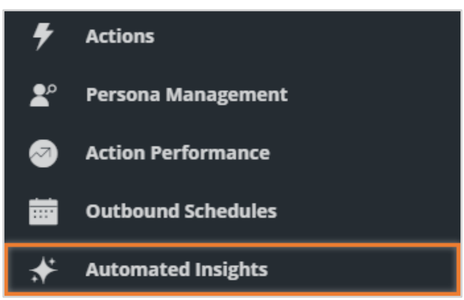
Introduction

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

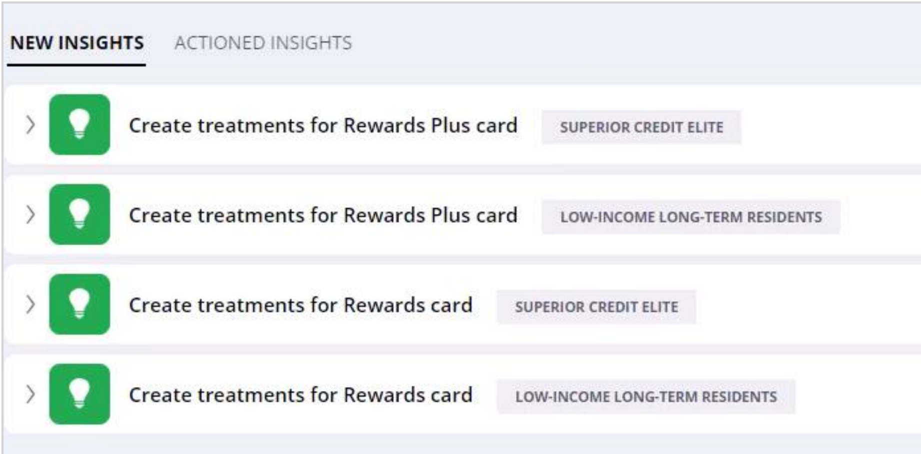
This video shows you how to use **Automated insights** to make the change request creation process more efficient and effective.

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.

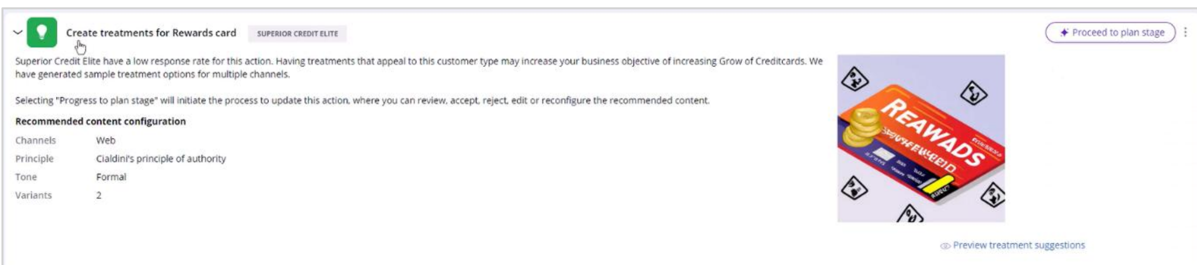


U+Bank has several active credit card offers. Based on a Value Finder analysis, the treatments associated with the actions do not bring the maximum business value. The bank aims to increase the accept rate of existing actions.

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

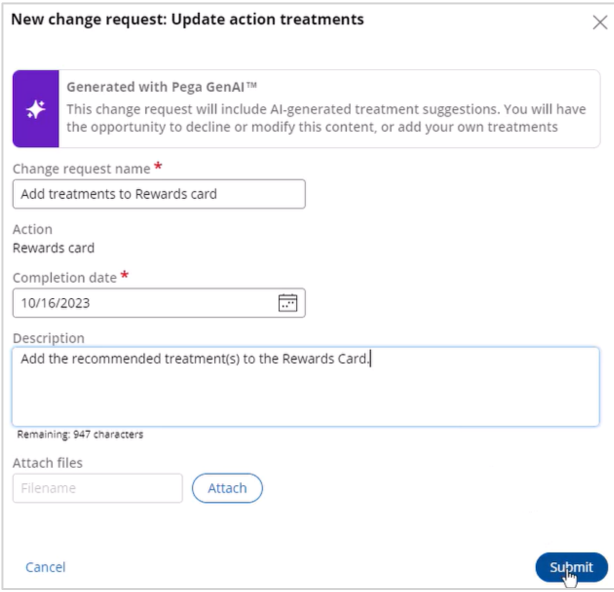


Expand the single recommendation to view its description and details. In the **Recommended content configuration** section, you can review the recommended treatment settings and check how many variants of the treatments are preconfigured. Click **Preview treatment suggestions** to see the two options.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



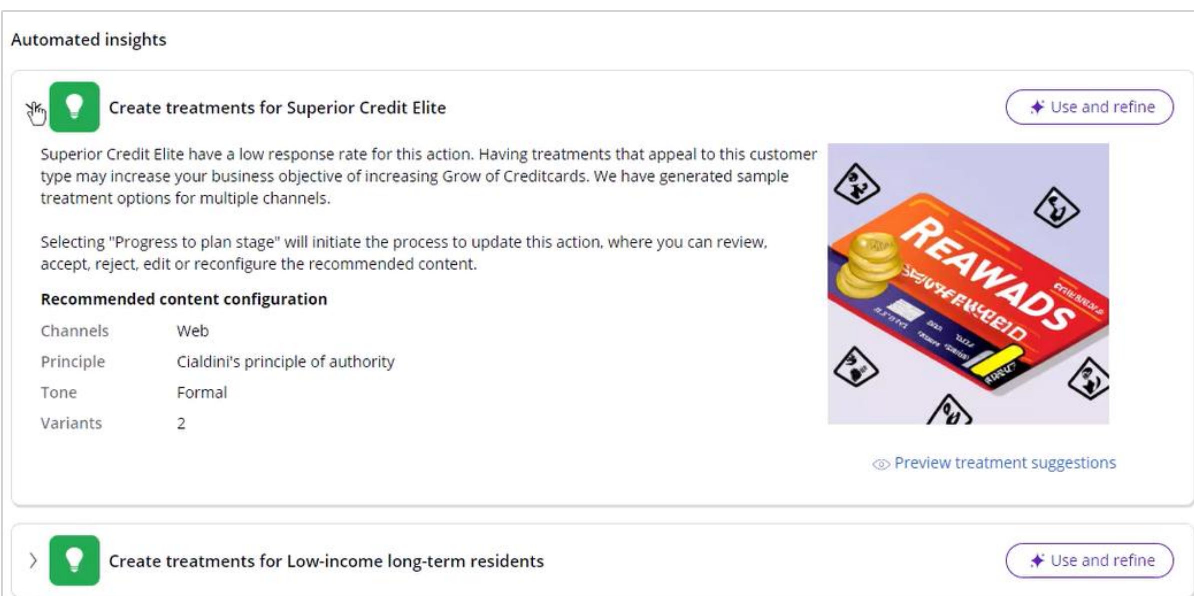
In this case, a particular audience exhibits a low response rate for the Rewards card. Presenting this offer to the **Superior Credit Elite** customer type would likely result in a higher accept rate.

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.



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.



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`, add the description of the card and select the appropriate Business issue and Group if you know it. These details can be updated later in collaboration with the next-best-action specialist.

In the **Define attributes** Stage, you can also provide details about the purpose of your action or upload the marketing brief file to generate the Marketing Summary.
A marketing brief is a document that defines the goals, target audience, and strategy for a marketing campaign. It contains key information about the campaign, offer, channels, timelines, and success metrics.

The Marketing Summary captures key business information about the product, including:

- Action details
- Campaign details
- Marketing context
- High-level description of the intended customer interaction

Customer Decision Hub uses this information as input for large language models (LLMs), along with elements such as Brand Voice and Cialdini's principles, to generate consistent and effective treatment content across channels.

Without the Marketing Summary, the system might lack sufficient context. As a result, the generated content might be less accurate or inconsistent, because the LLM might attempt to infer missing details.

The Marketing Summary feature is available only when Pega GenAI™ capabilities are enabled.

Continue to define the availability.

In the **Define availability** section, you can provide details on action availability.

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 completed tasks and generate artifacts from tasks as an NBA Specialist. When the artifacts generation is 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, continue to the validation stage, write a comment, and continue.

Check the status of the artifacts to validate the revision. In this case, the status is pass. Now, you can deploy the revision and complete the change request.

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

With this pipeline, you can 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

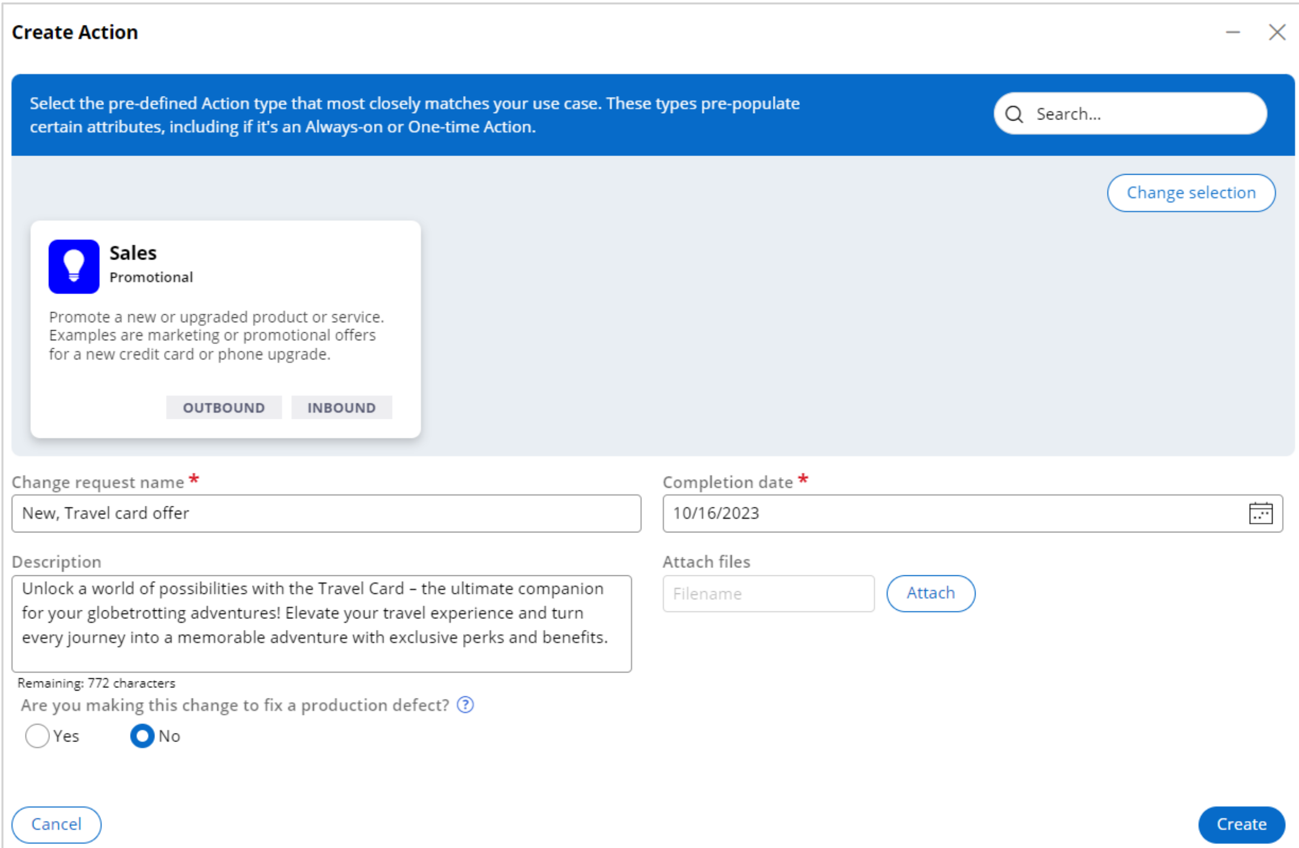
This video shows you how to create a treatment in 1:1 Operations Manager, using Pega GenAI features.

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.

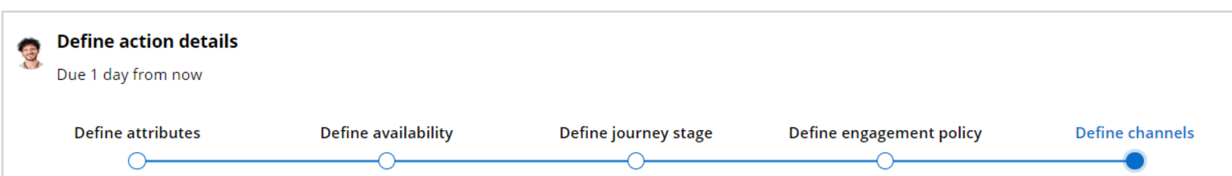
To enable the image generation functionality, you must configure your own generative AI image provider and set a provider key. Without this key, the application will not generate images.

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.



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.

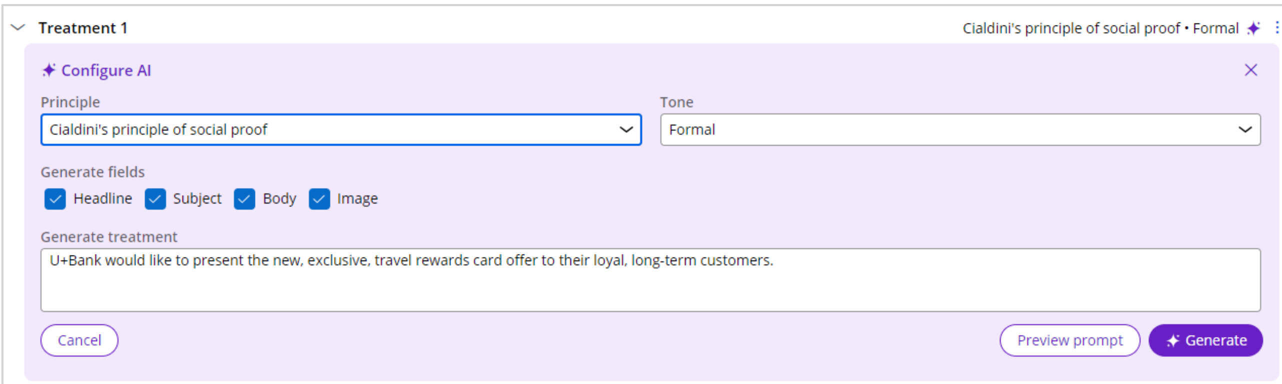
The Pega GenAI feature is available in both web and e-mail treatment creation windows, after you click the purple **Polaris** icon.

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

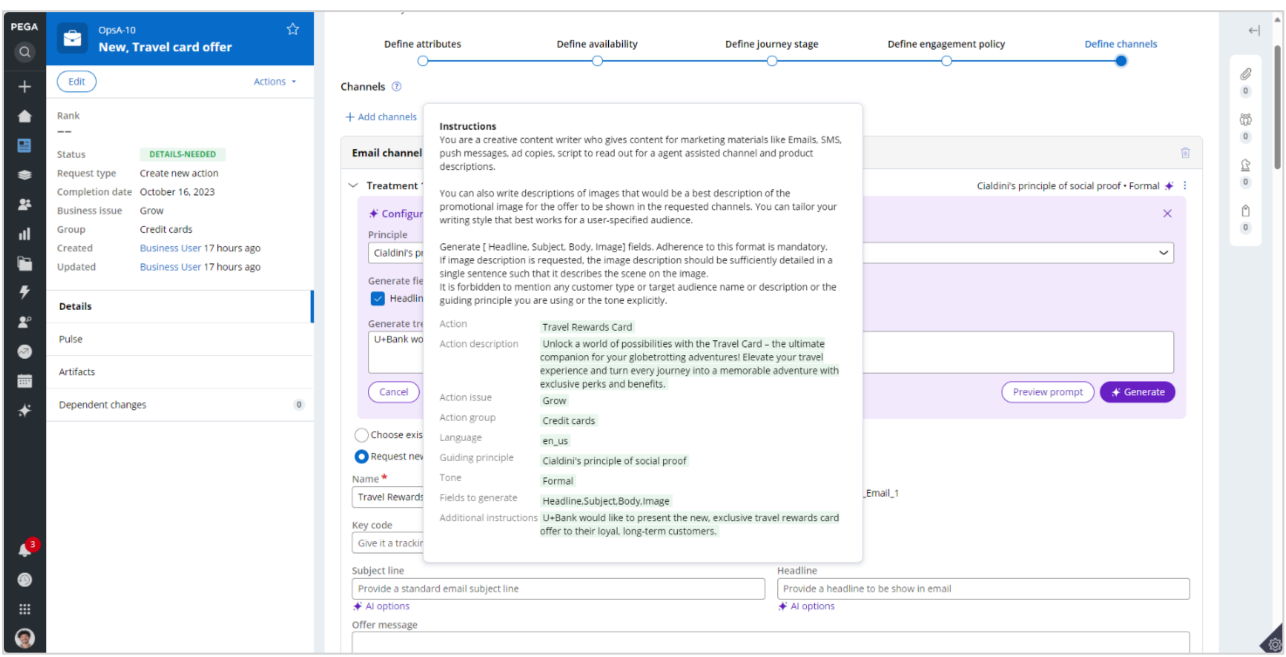
You then select one of seven Cialdini's Principles of Influence to specify the aim of the message.

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

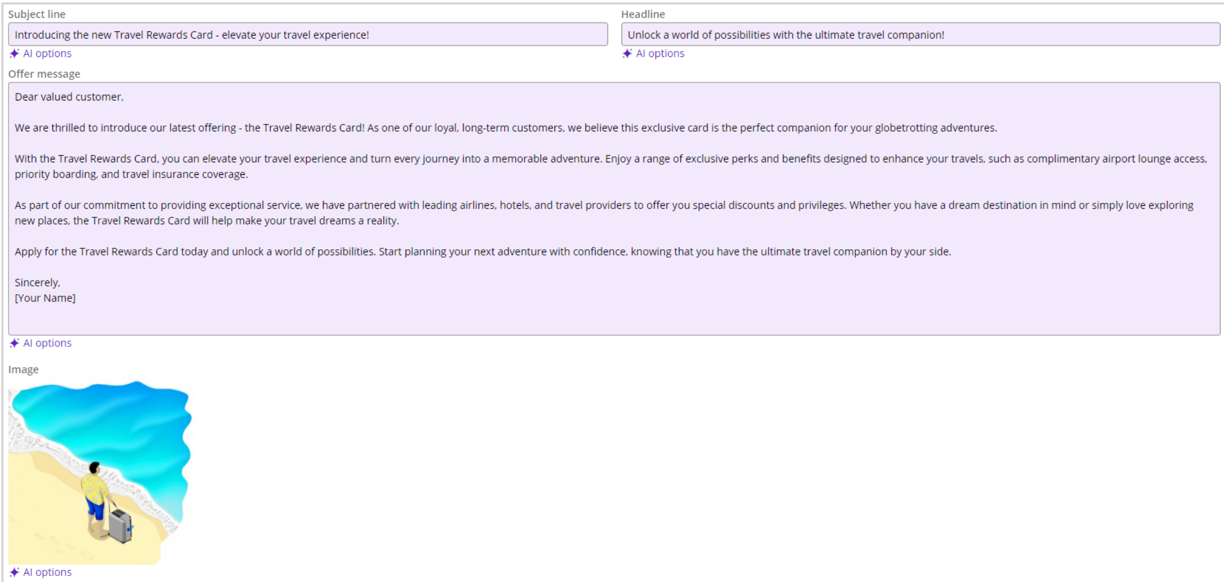
After selecting the principle, determine the tone of voice for the message. Finally, outline the specific items you wish to emphasize in the treatment.



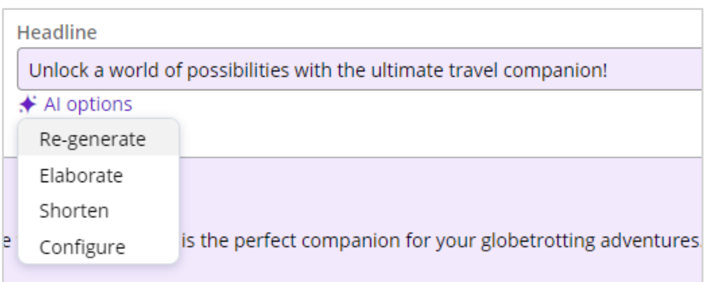
Before generating the e-mail, click on the Preview prompt button, to view the instructions and the details used by Pega GenAI to generate the final message.



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

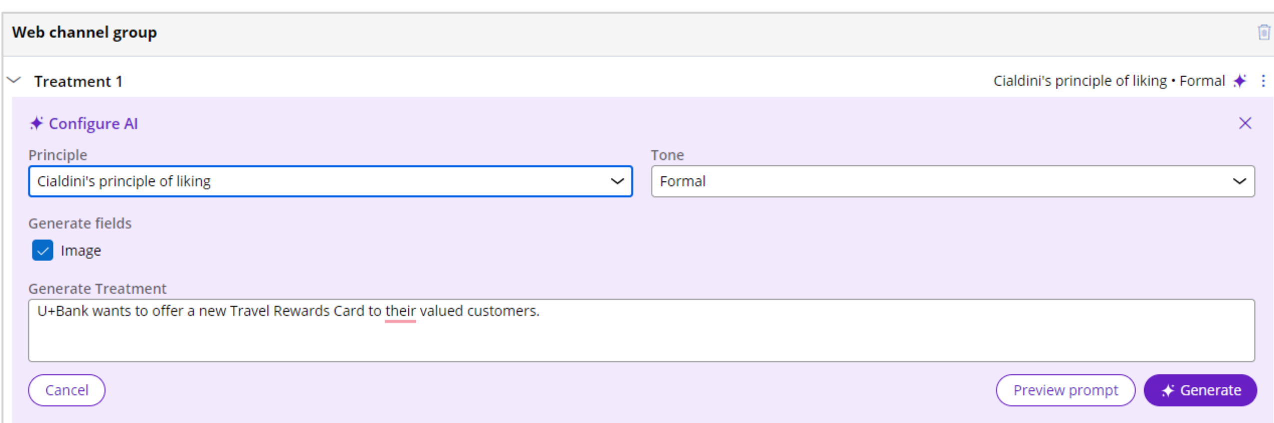


Each part of the message, such as the **Subject line**, the **Headline**, the **Offer message**, and the **Image**, can be re-generated or edited separately.



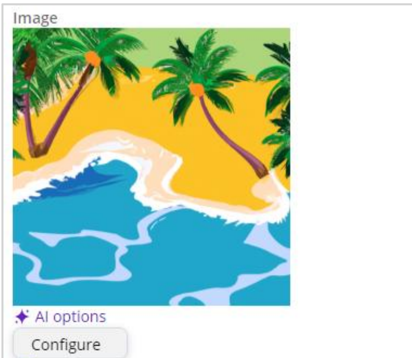
The other elements of the e-mail treatment, for example **Name, Availability** and **Business weight** must be set manually.

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.



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.

Anticipating customer outreach

Reach explorer enables business users to explore the potential reach of new actions based on defined engagement policies.

Users can estimate the impact of their customer engagement policies without requiring technical expertise, enabling them to make data-driven decisions and assess how well the new action reaches its audience.

Reach explorer enables users to test-drive the actions by applying policies and learning about anticipated volume estimates at each engagement level, before deploying actions to production.

When should you use Reach explorer?

Use Reach explorer when you need to:

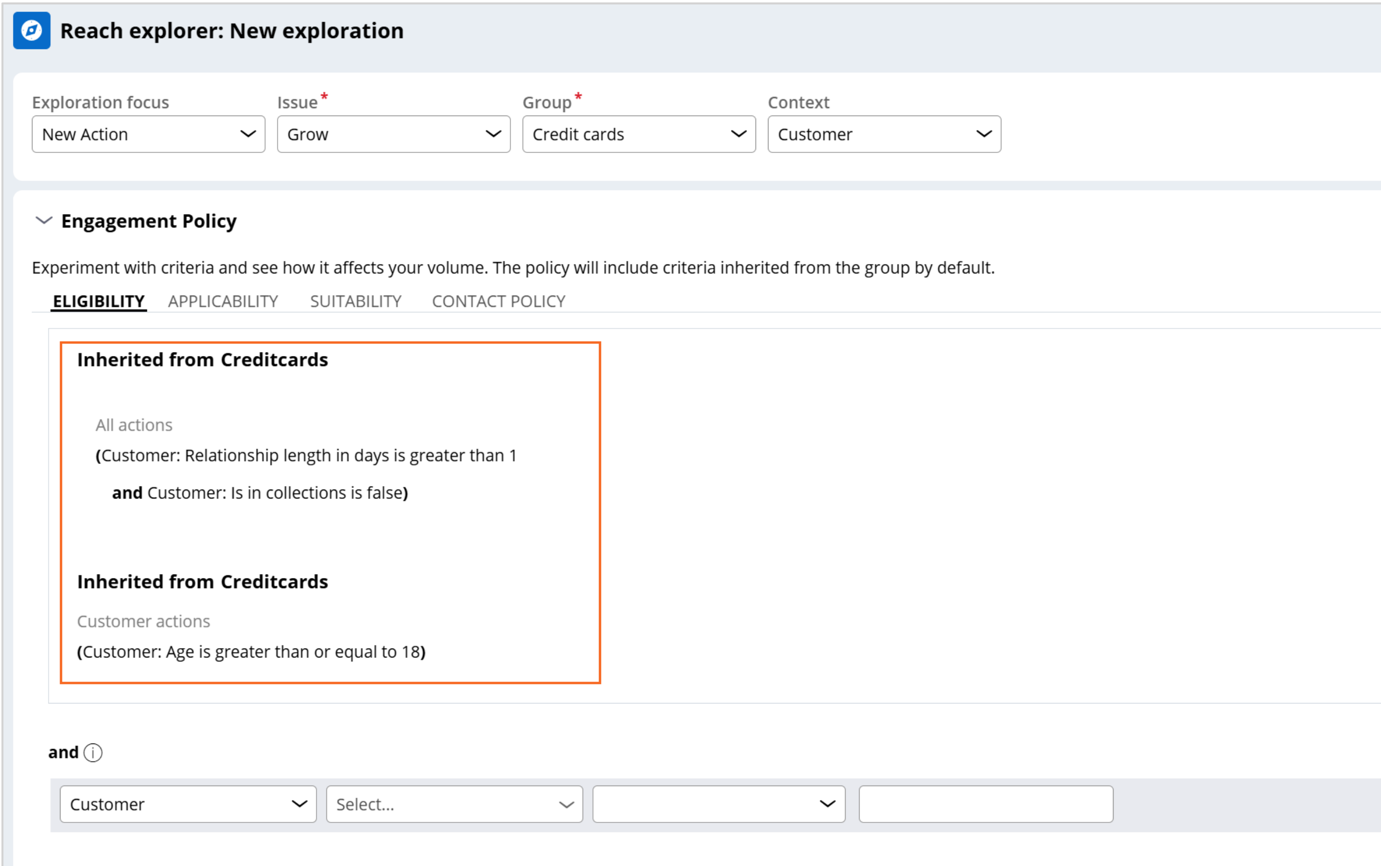
1. Estimate potential customer reach before launching a new action
2. Test different engagement policy combinations
3. Validate Action effectiveness before deploying the changes to production
4. Optimize customer engagement strategies based on anticipated volumes

Transcript

U+ Bank is preparing to introduce a new credit card promotion. The new offer is designed for current account holders aged over 25 years. Prior to implementing the full-scale launch, the content management team seeks to assess the potential reach among targeted customers.

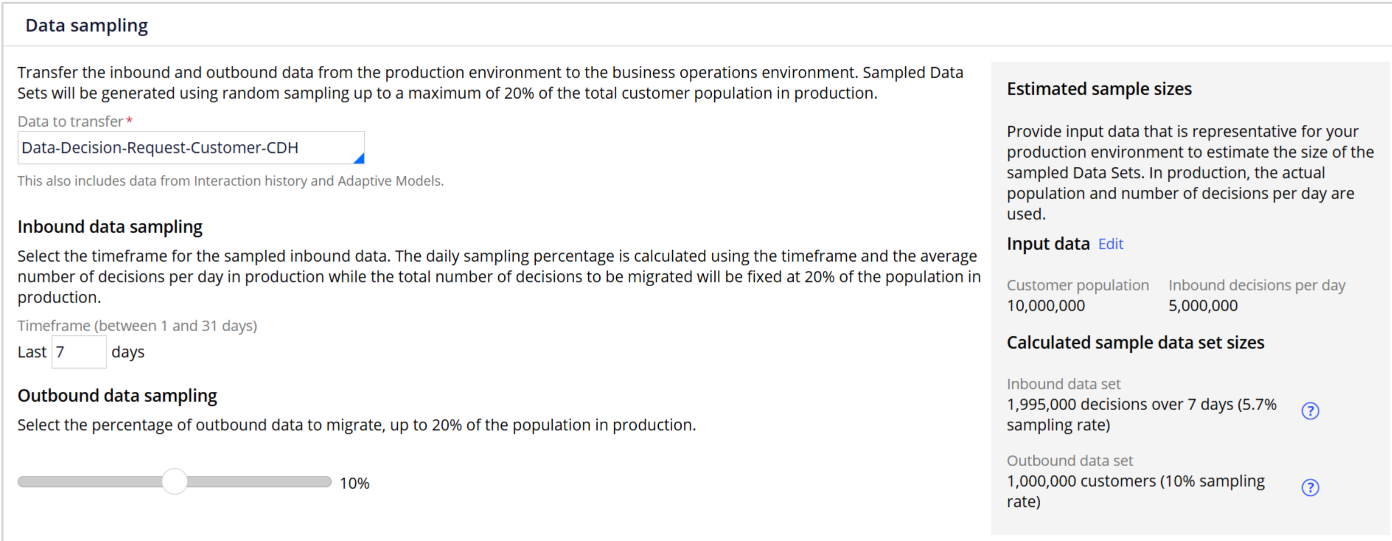
To implement this requirement efficiently, log into Pega 1:1 Operations Manager as a Business User.

Navigate to **Reach explorer** landing page and create a new exploration. Select the business issue and group. The group level engagement policies (defined in the Next-Best-Action designer) will be inherited from the group by default. You can choose to apply them or ignore them.



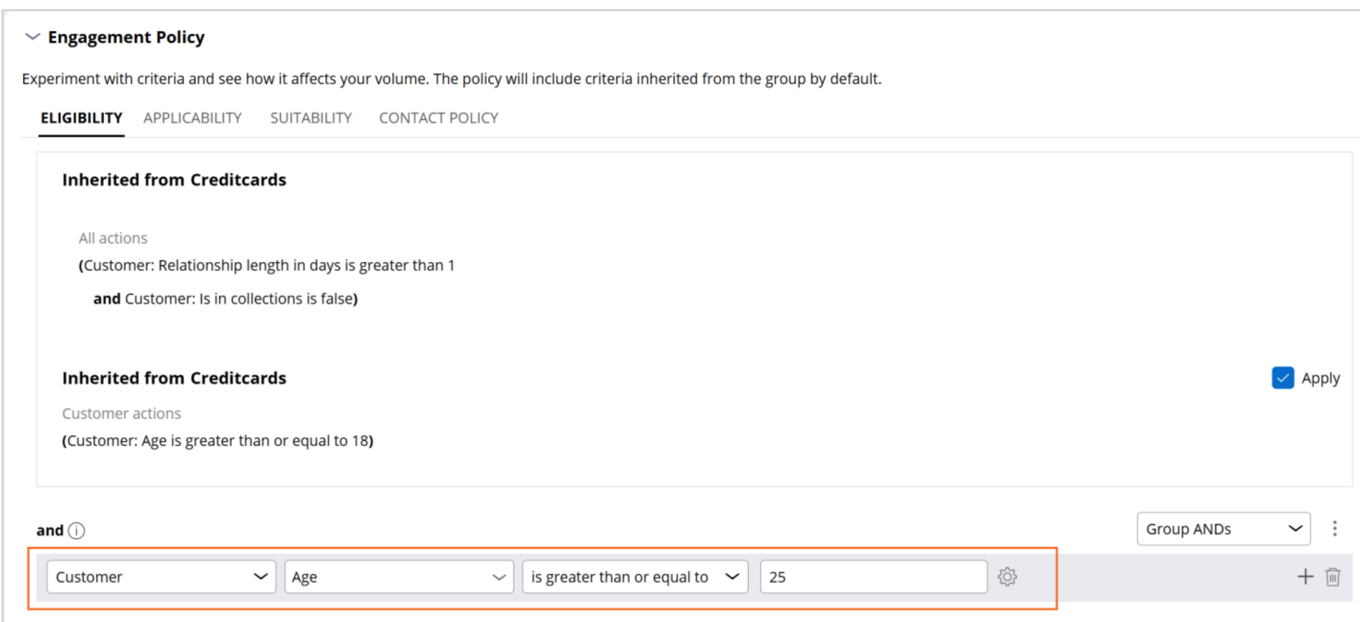
The **Anticipated reach** section provides a detailed overview of the expected reach based on the engagement policy configured. It provides a graphical and tabular view of reach reductions at every policy phase, helping business users in the decision-making process.

The starting population of the anticipated reach is based on the sample size setting in the data migration configuration.

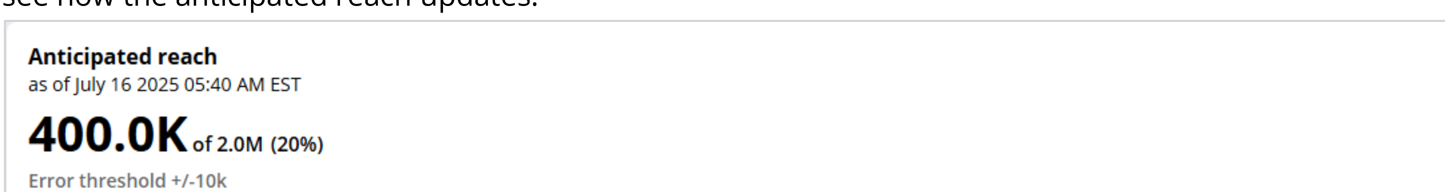


Add the new criteria in the Engagement policy section:

Eligibility: Age is greater than or equal to 25 years



Once the criteria have been added, refresh the counts with the latest engagement policy to see how the anticipated reach updates.



Now, you can analyze the anticipated reach.

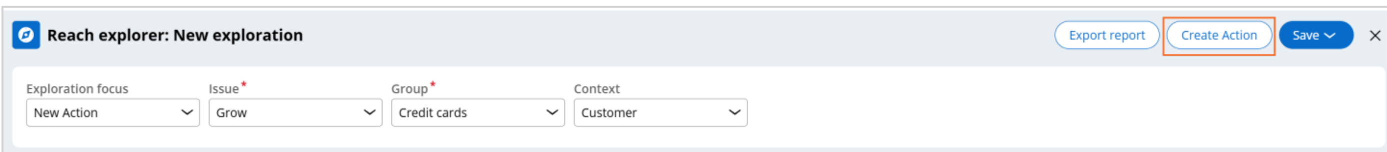
Anticipated reach numbers show expected customer volume based on defined engagement policies.

Engagement levels help identify how different customer segments respond to specific policies, enabling fine-tuning for maximum effectiveness.

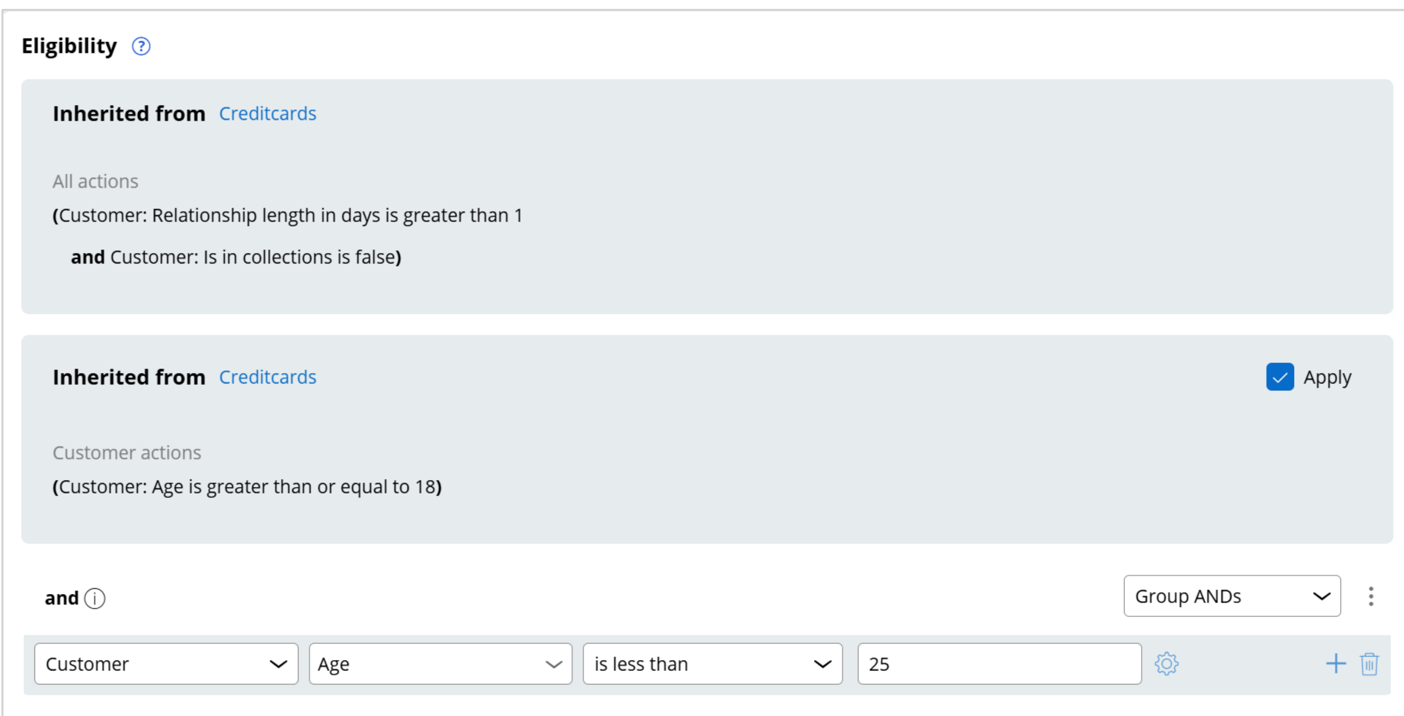
Save the exploration.

You can modify the Engagement policy with different criteria and iterate the exploration until you reach the optimal results.

After evaluating engagement policies and results, you can create a change request for the new action from the same landing page.



The system prepopulates the **Create Action** change request with Business issues/group, and defined engagement policy.



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

1. How to create an exploration to identify the potential reach of a new action.
2. How to apply different engagement policy criteria and observe the anticipated reach.
3. How to save an exploration and create a change request for the new action with a predefined engagement policy criteria.

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

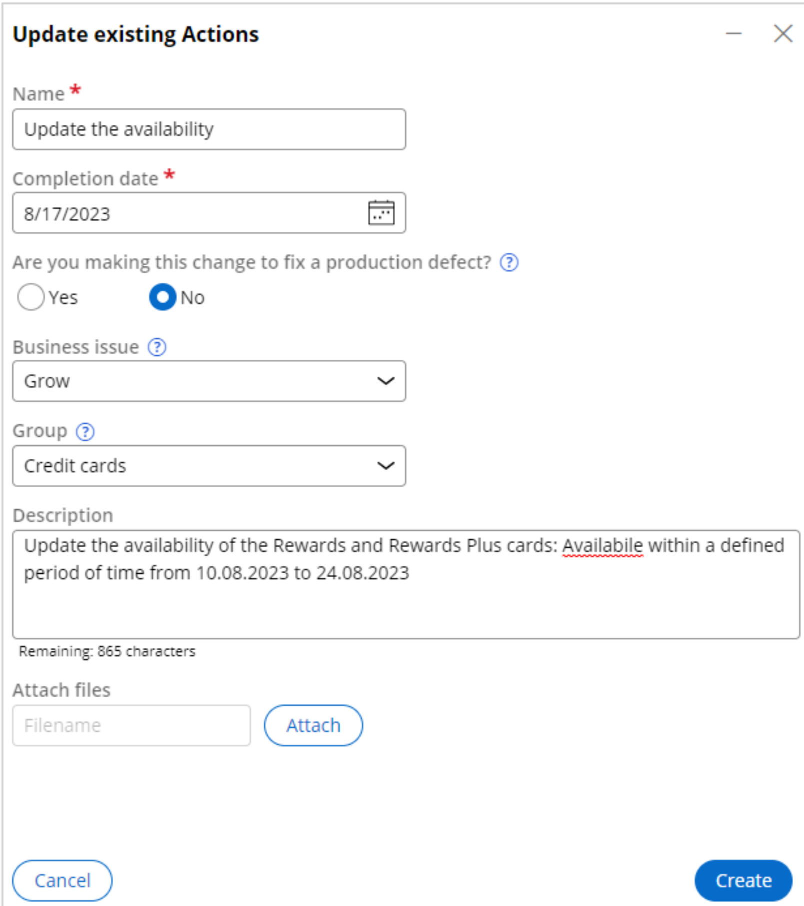
In 1:1 Operations Manager, there are three types of change requests that are currently supported:

- Create Action
- Create Action update
- Create Other

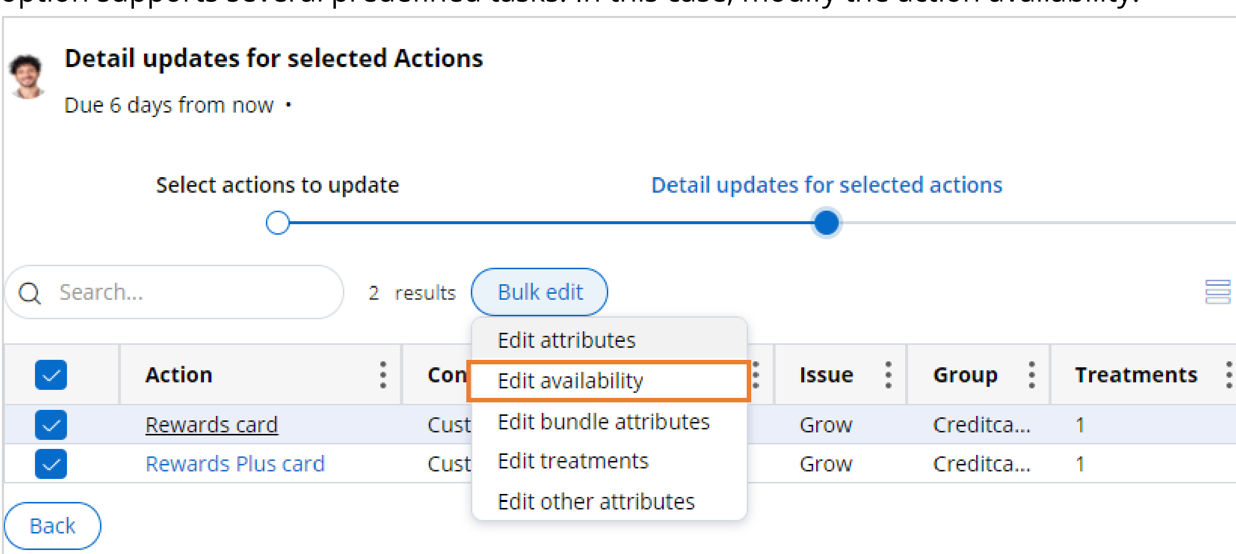
In addition to single action updates, the **Action update** change request type enables you to perform bulk updates on always-on actions. A bulk edit feature is a valuable option when you need to implement a specific change across multiple actions. For instance, if a business requirement entails modifying 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.

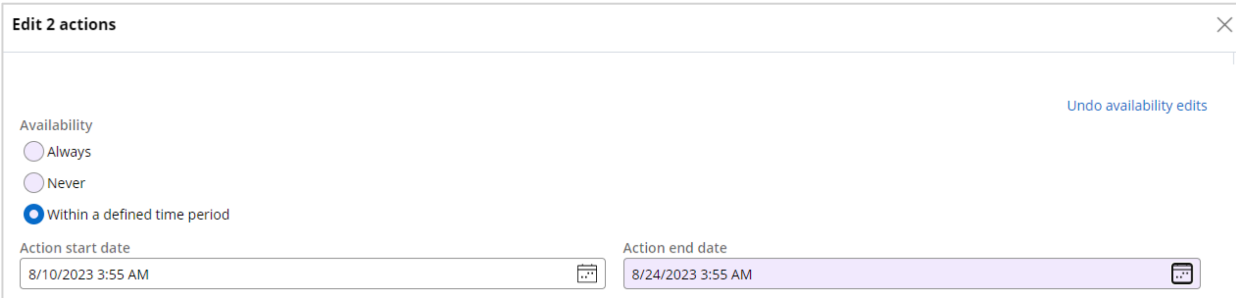
To meet the business requirement, you need to design a bulk edit change request. As a Business user, create the **Action update** change request and select the credit card actions that require editing.



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.



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.



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.

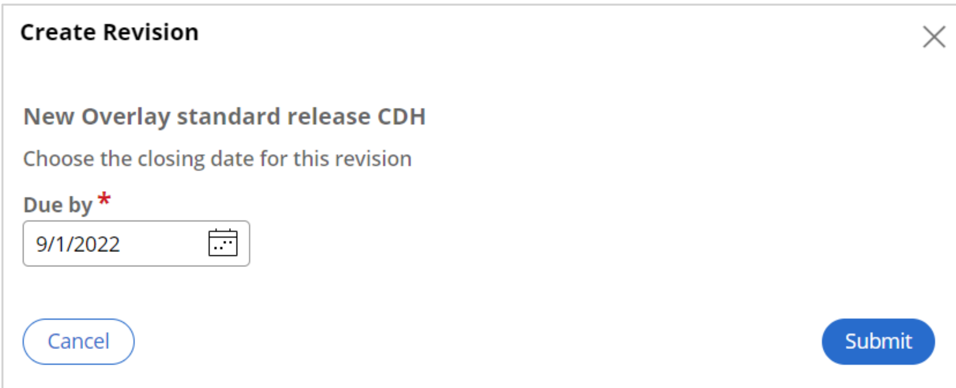
Transcript

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.

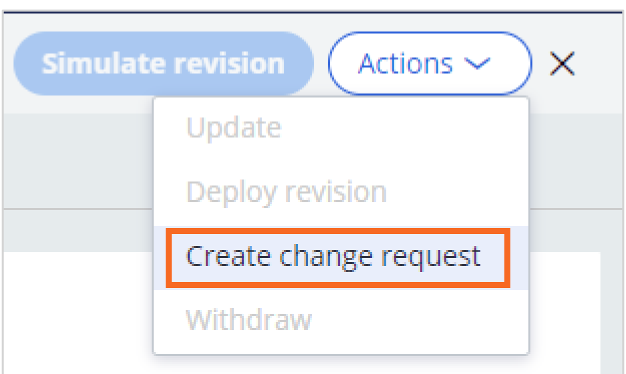
The bank wants to modify the credit score decision strategy that segments customers into two categories based on the customer credit score: **Suitable** and **Not Suitable**.

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.

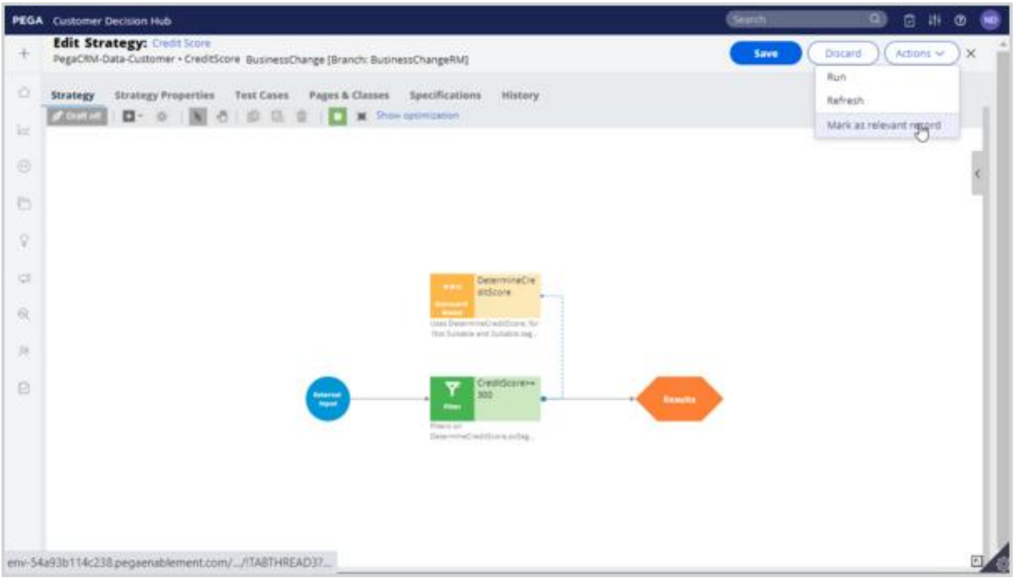
Once the change request is submitted, as an NBA designer, using revision management, you can access the change request assigned to you and the rules associated with it.

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.

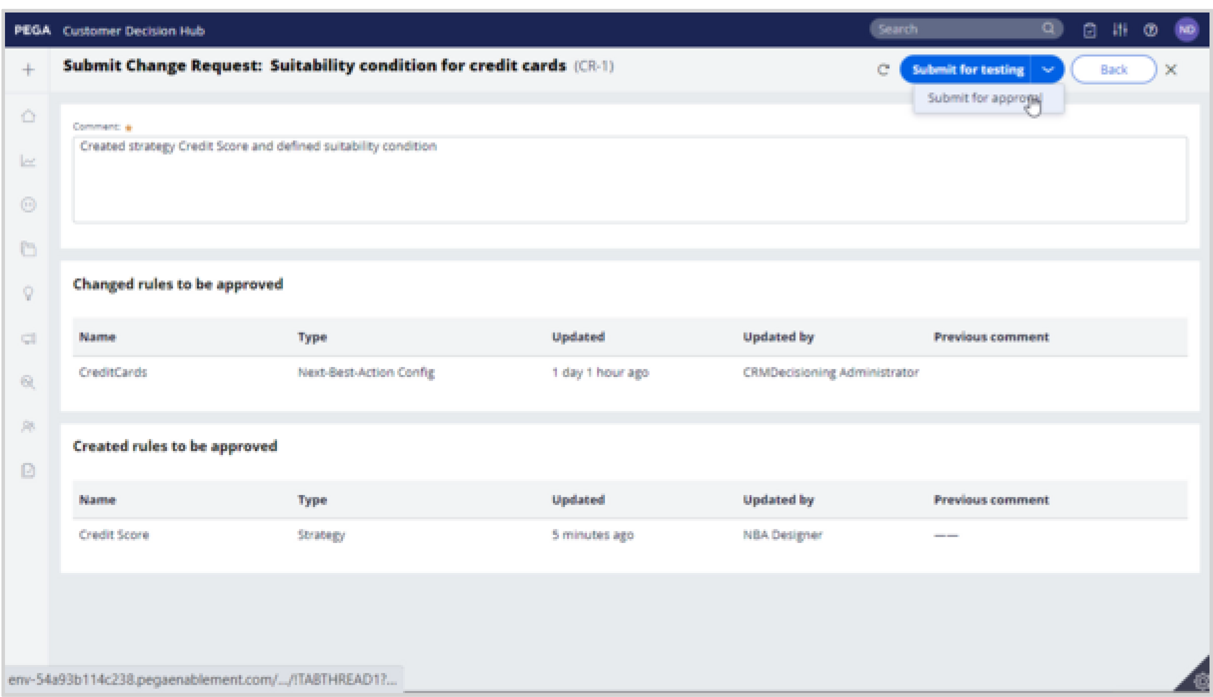
An NBA designer can send the change request back to the team lead if additional rules are required to complete the change request. The NBA designer can also create new rules, and those new rules are automatically added to the change request.

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

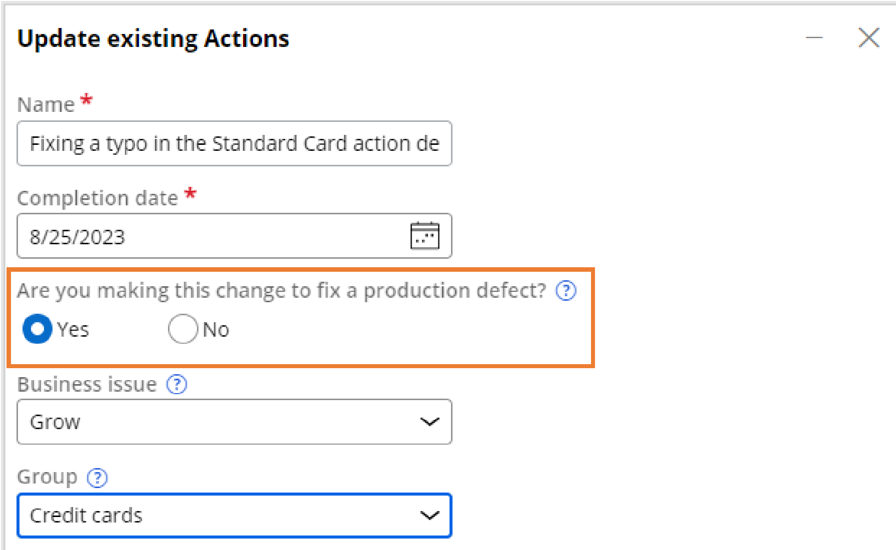
Fast-track change requests effectively handle urgent business demands. A fast-track change request offers a means to efficiently implement critical changes without interfering with current revisions. Revision Management in Pega 1:1 Operations Manager addresses the fast-track changes by using fast release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

Examples of fast-track change requests include:

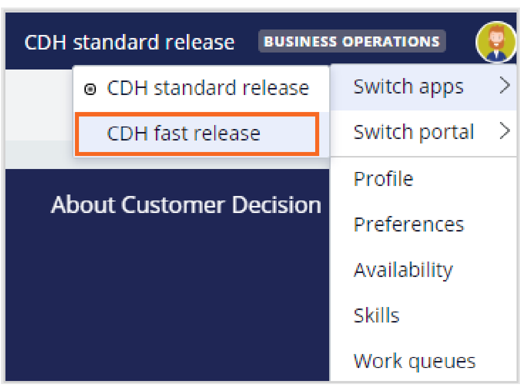
1. Fixing a typo in the action that was deployed to production (updating an existing action).
2. Deactivating an action from production (updating an existing action).
3. Communicating with customers in an emergency (creating a new action).

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**.

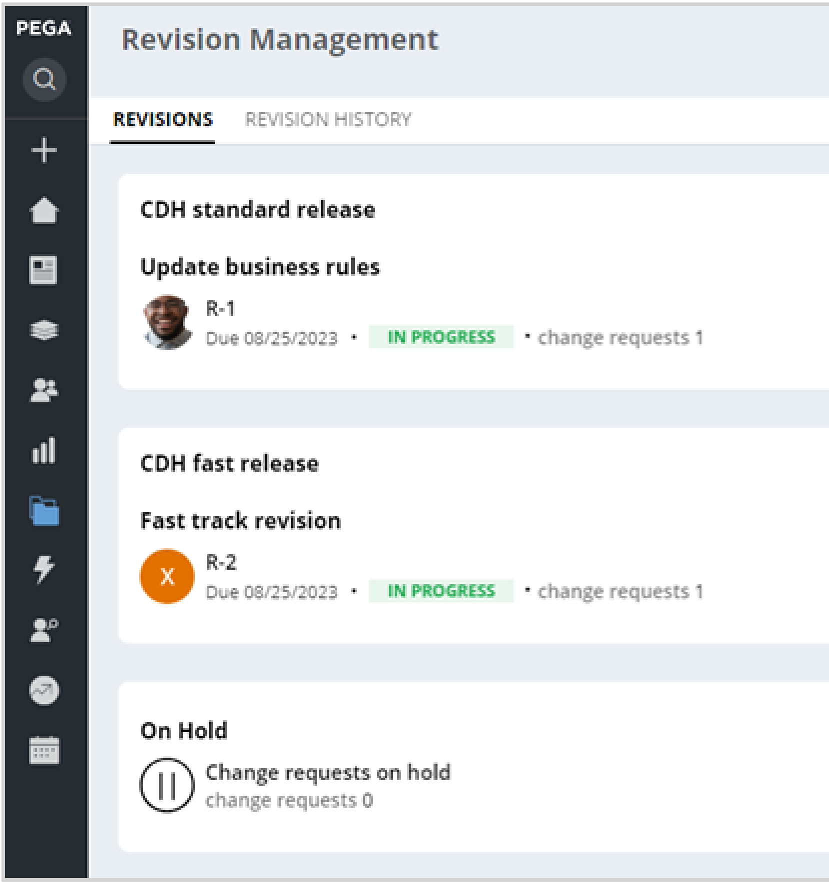


The implementation of the fast-track change is similar to a standard business change. During the deployment process, the revision manager switches to the CDH fast release application to deploy the fast-release revision through the **fast release pipeline**.



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?

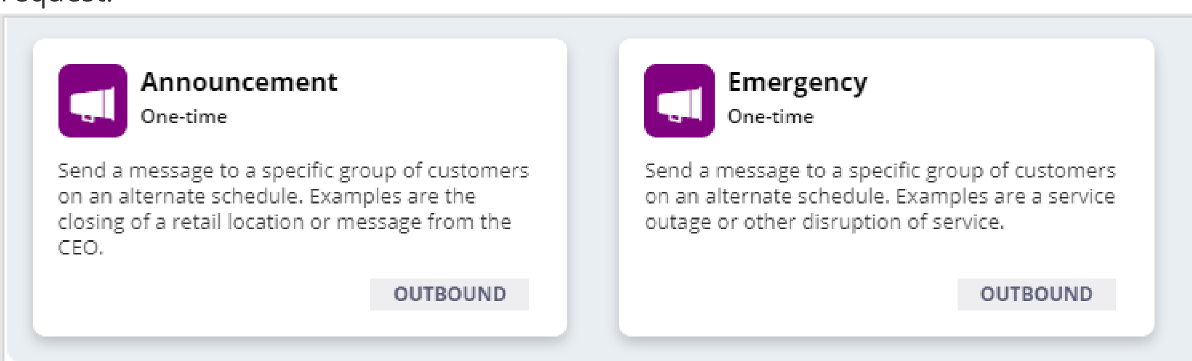
One-time actions are sent when the communication:

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.

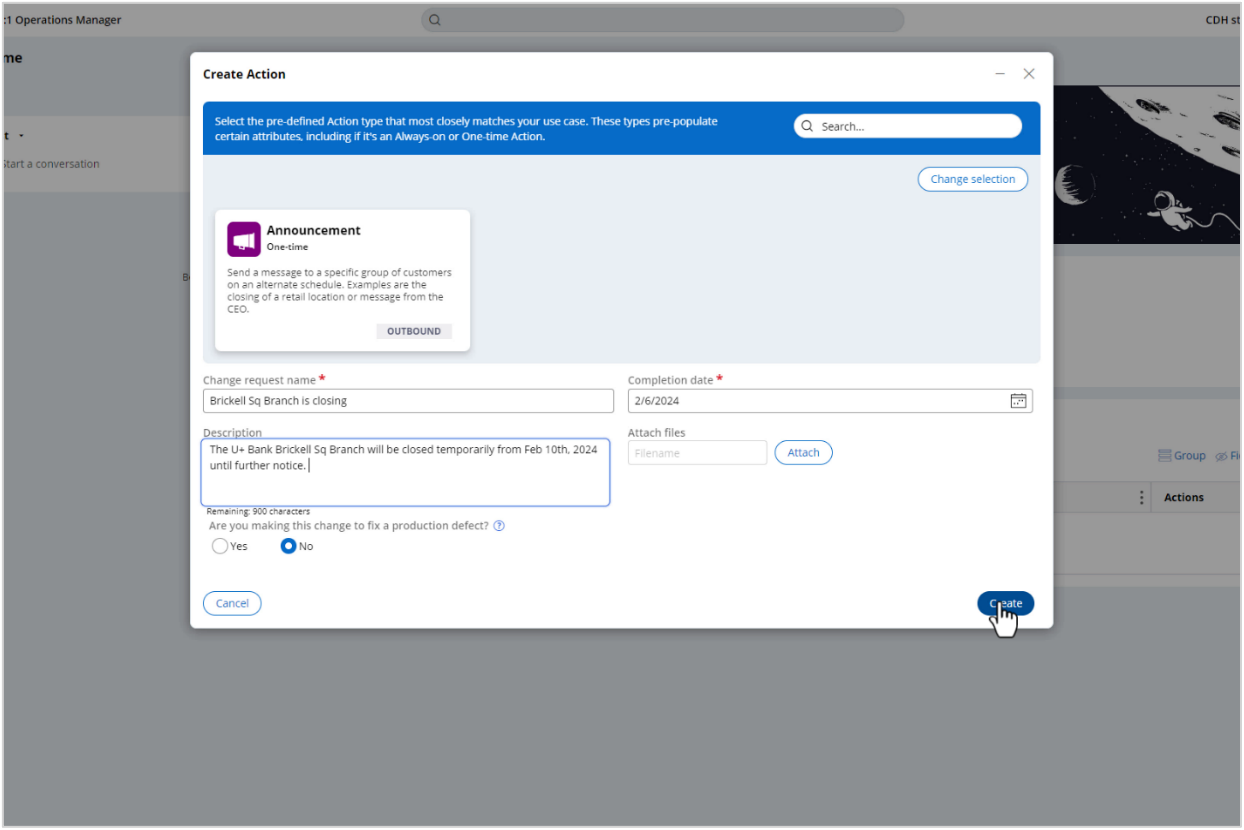
Transcript

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.

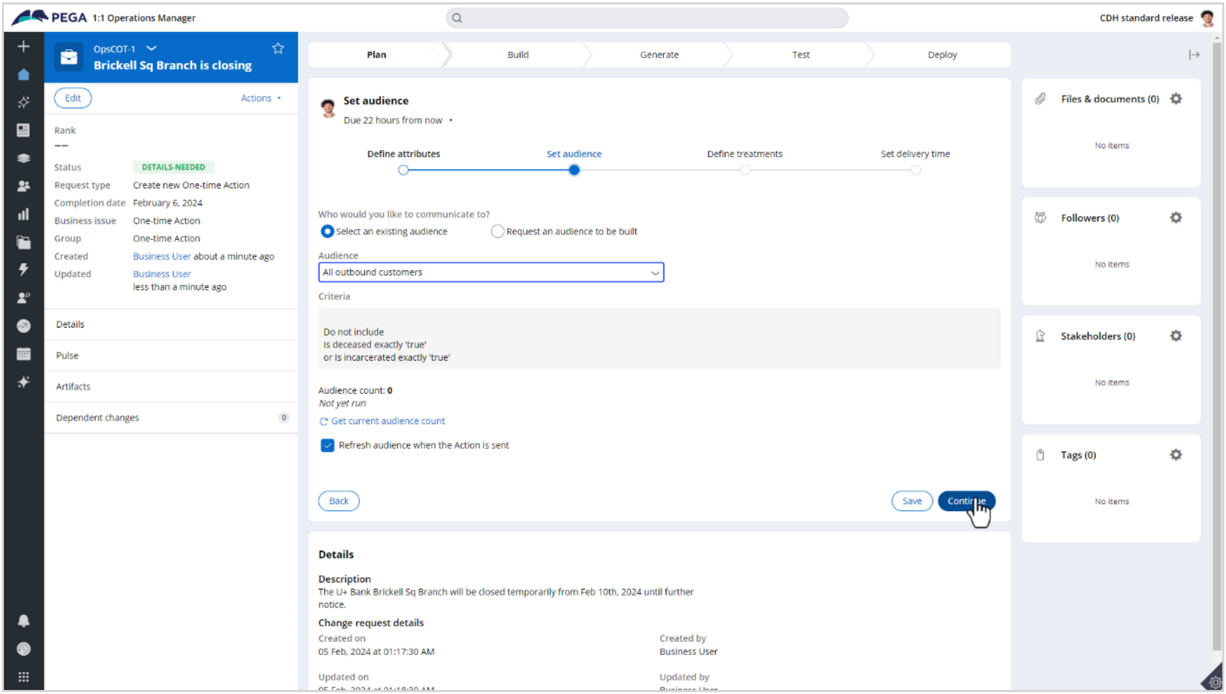
To begin, as a Business User, you create a new change request of the **Create > Action** type and select the appropriate tile. In this case, **Announcement**. Enter an appropriate name and description for the change request and specify the completion date.



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.

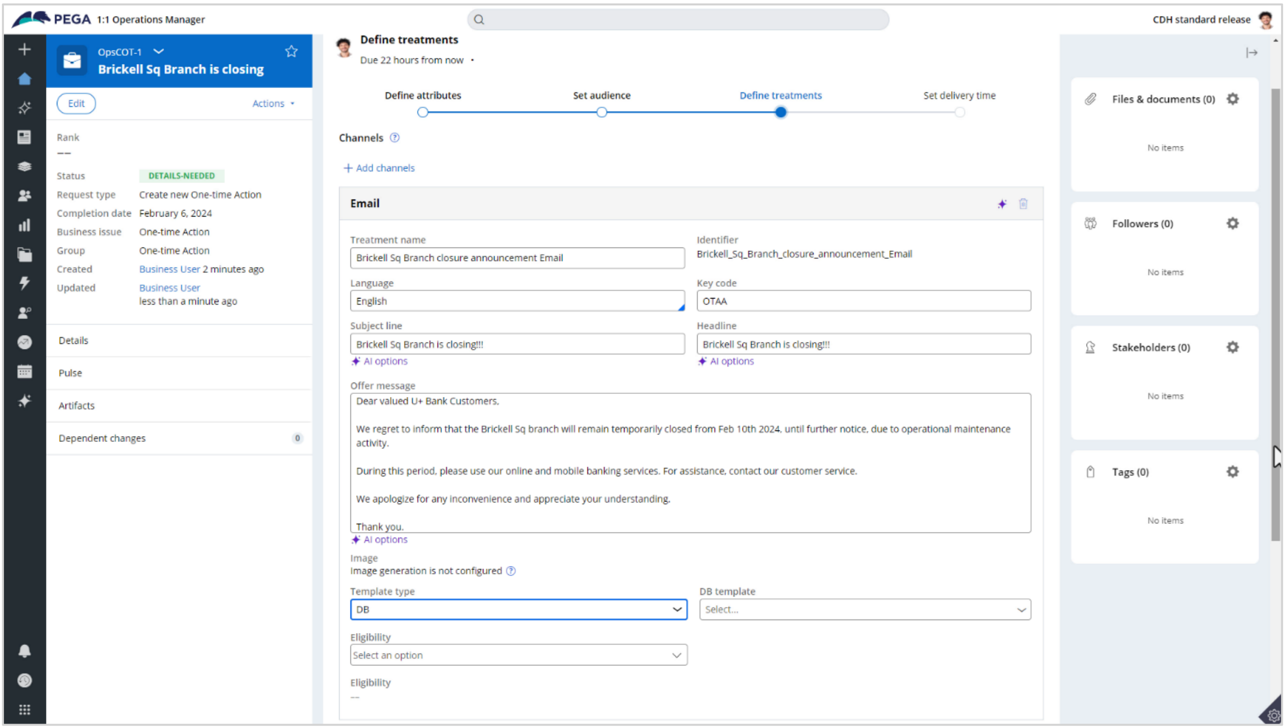
Audience refers to a list of potential target customers, which is implemented using the segment component. A segment is a reference to a database table containing a list of customer IDs that match specific criteria.

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.

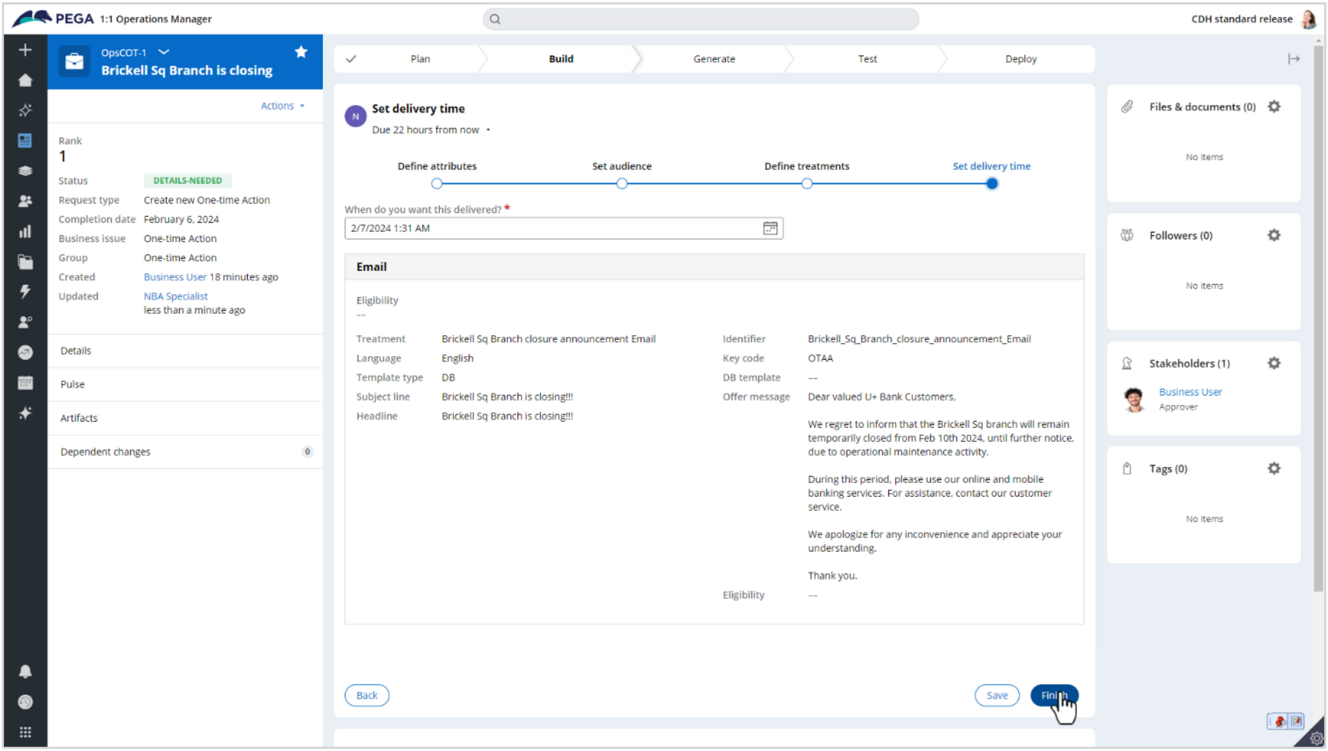


Next, you set the delivery time and finish the task.

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.

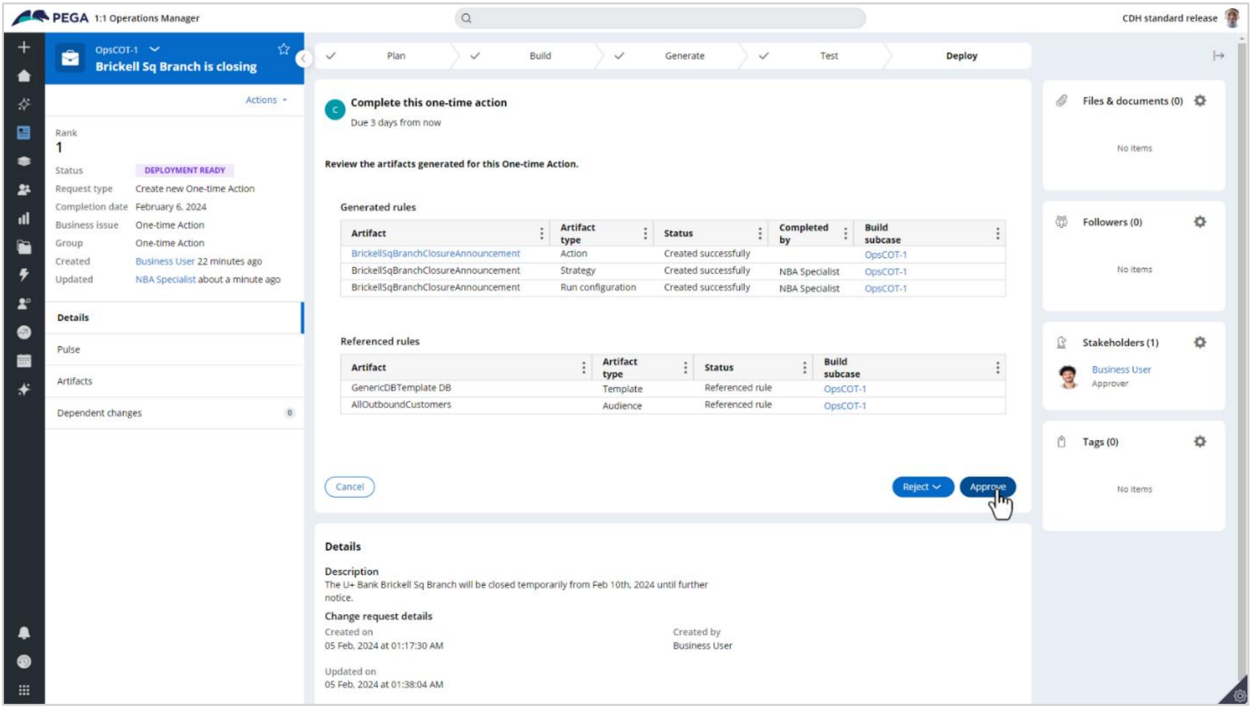
In the first step, finalize the action attributes. In the Set audience step, ensure that the right audience is selected. Then, define the treatments. Review the treatment details and make edits if necessary. As an NBA Specialist, you also need to configure the **Template type** field. Select the Email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



Review the time of delivery for the one-time action and finish the task. Then, complete the **Generate artifacts** task.

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

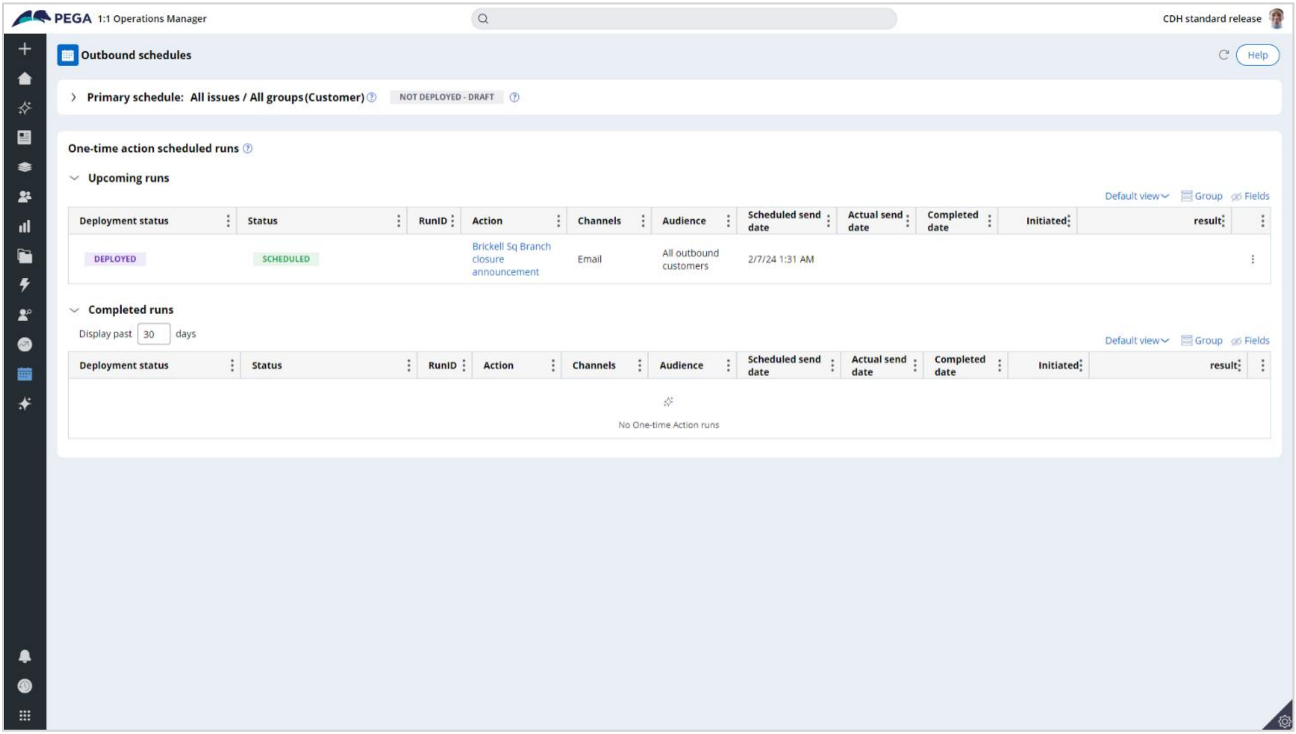
Following the submission of updates by the NBA Specialist, log in again as a Team Lead to approve the updates and promote them for deployment.



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.



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.

Enhanced email authoring tool

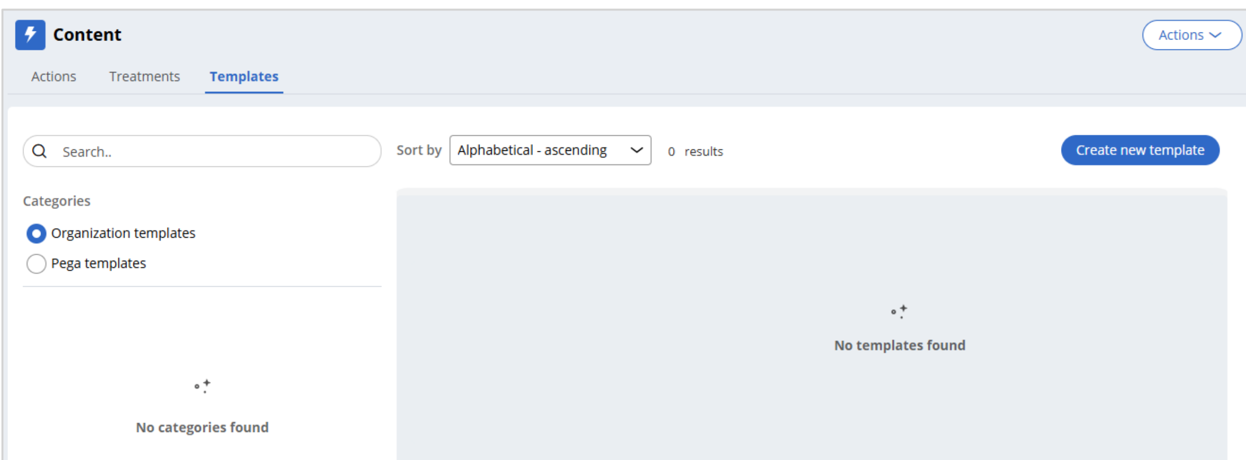
The enhanced email authoring tool is a feature in Pega 1:1 Operations Manager to create internal email treatments with visually engaging templates. Users can either customize a pre-built template or create a new one to use as an organization email template. The drag-and-drop interface of the tool makes it easy to design email treatments with content blocks. Use organization templates that focus on your use case.

Transcript

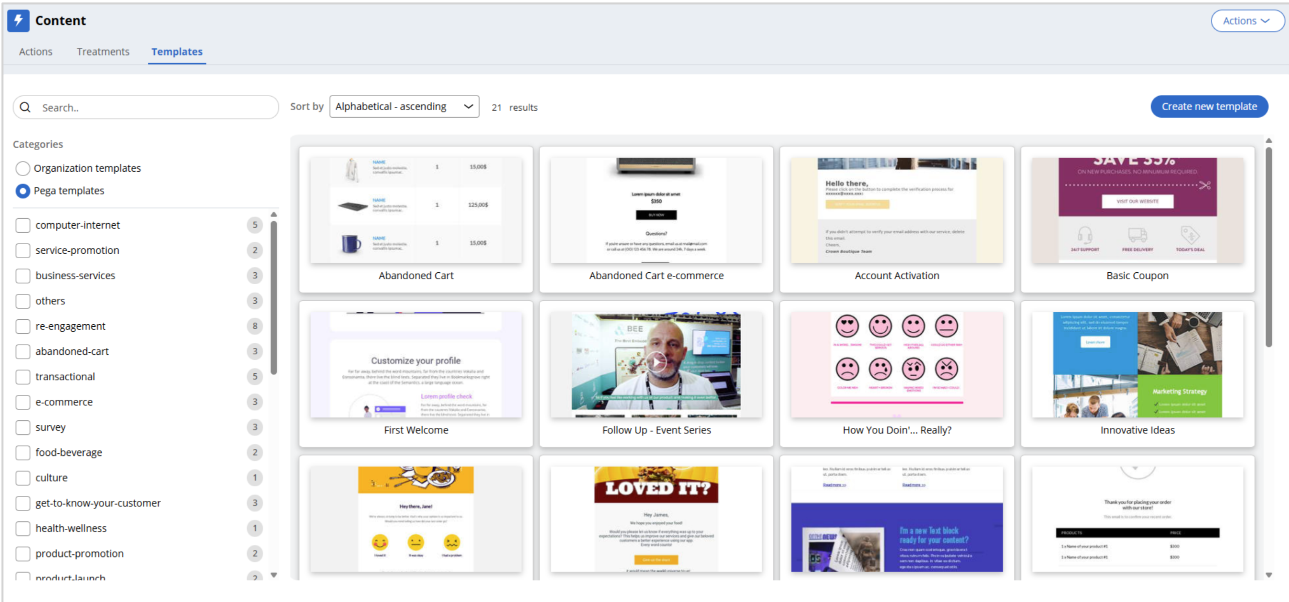
In this video, you learn how to use the enhanced email authoring tool in Pega 1:1 Operations Manager to create an intuitive email treatment.

An email treatment is a personalized message that helps engage customers. U+ Bank wants to send a visually appealing and engaging welcome email to the newly onboarded customers who have just completed their online account registration.

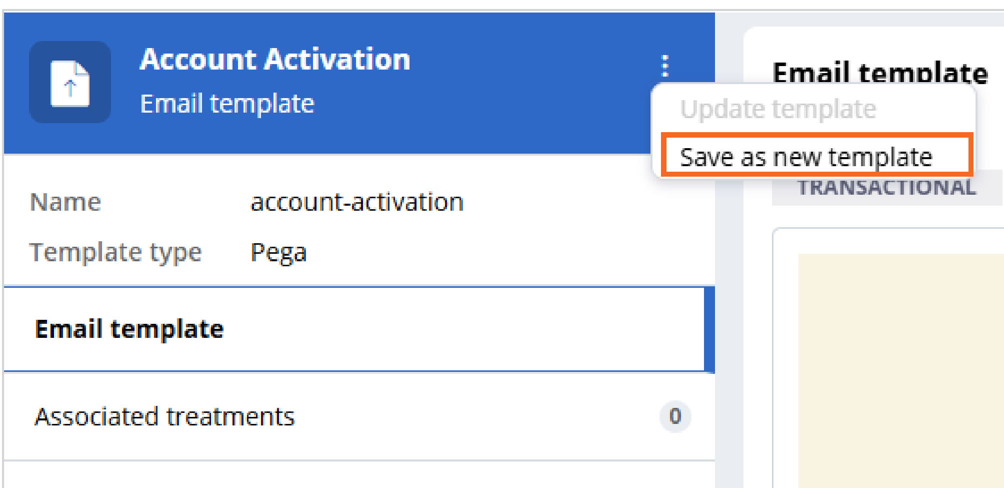
1:1 Operations Manager provides a range of templates that you can use to create email treatments. The Content Lead is responsible for enabling and managing these templates. Navigate to the **Content** landing page and select the **Templates** tab to view available email templates. You can create a new template or select an existing one.



In the **Categories** section, select **Pega templates** to see the system-provided templates. A variety of email templates are readily available to suit your different needs. Select the template that best fits the current business need.



To make the template an organization template, click **More > Save as new template**. Fill the change request form.



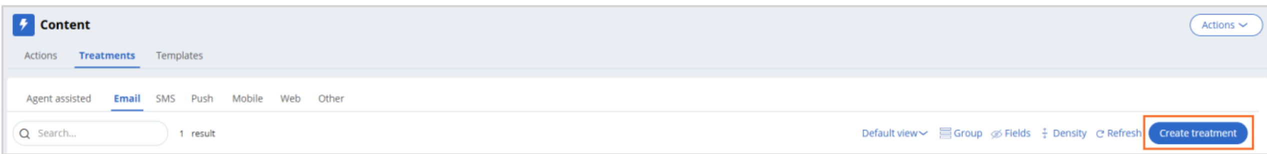
The Content Lead can customize the template by adding, removing, or rearranging the content blocks, and changing brand elements such as colors, fonts, and logos. Three editing sections are available in the tool. On the **Content** tab, you can add, replace, and modify the content blocks. On the **Fragments** tab, you can add and manage reusable content fragments. Fragments help maintain consistency across email communications by allowing Content Leads to use standardized sections, such as headers, footers, or promotional banners. On the **Settings** tab, you can configure template properties.

For example, to update the brand element with the U+ Bank reusable banner image and the subject line fragment use the drag and drop feature. Update the fixed elements of the template, enter a name and category for the template, and then submit. The template is accessible on the content landing page.

Now, the Content Specialist can create new email treatments according to business requirements. The email treatment can be designed only using the **Organization templates.**

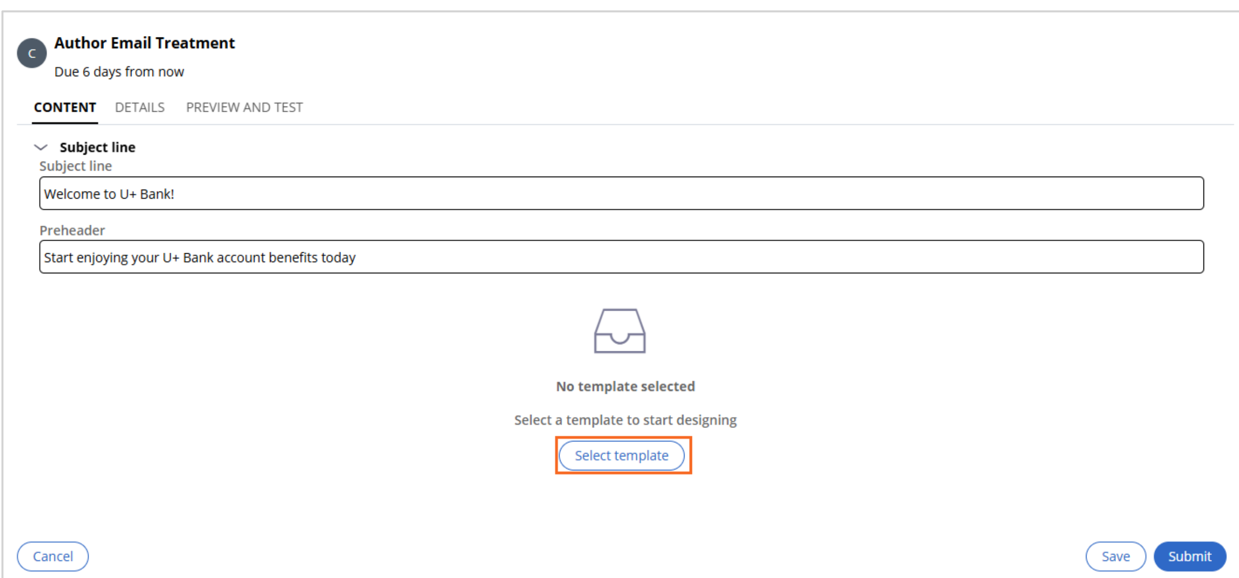
As a Content Specialist, navigate to the Content landing page. The Content landing page includes separate **Treatments, Templates and Fragments** tabs for relevant teams and users to manage content independently from actions.

Click the **Treatments** tab to create a new email treatment. On the **Email** tab, click **Create Treatment.**



Complete the details in the change request form, and then submit. The next step is to complete the email authoring task.

On the **Content** tab, provide the basic configuration of the email. Give a **Subject line**, and **Preheader**, then select the template that is relevant to the email. You can select any Organization template.

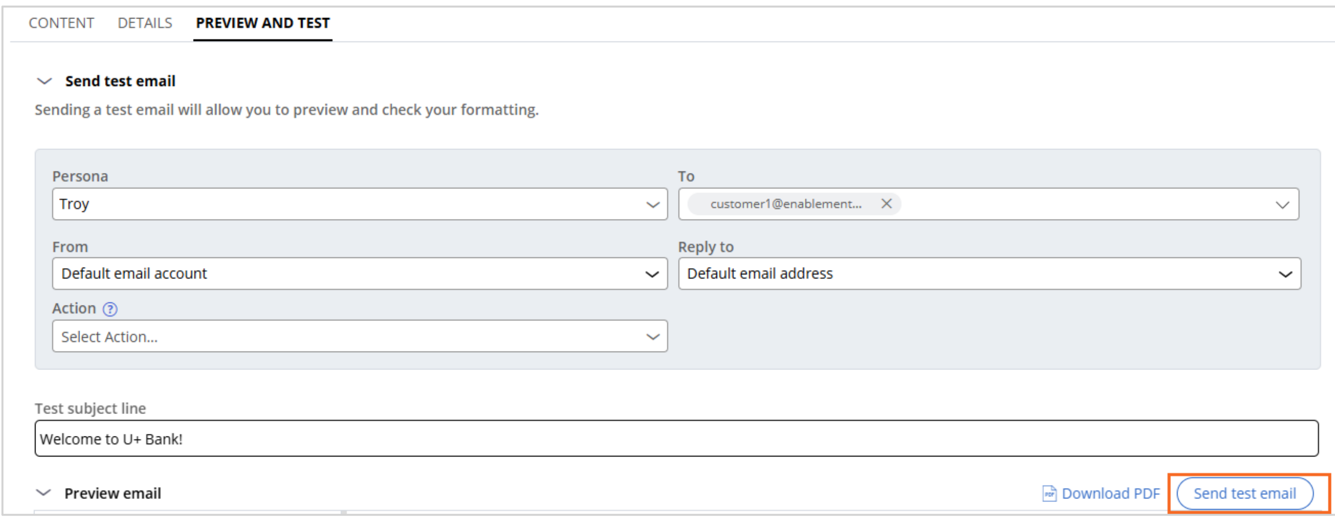


Now customize the content by using the enhanced email authoring tool. You can add customer properties to the text using merge tags option. For the current requirement, update the text for the welcome email.

You can change the template as needed. Note that the changes you make here only apply to this treatment, not the template.

After you finish authoring, click the **Details** tab to set the following treatment attributes: **Name**, **Language**, **Keycode**, and **Availability**.

On the **Preview and Test Email** tab, preview the treatment, and then send a test email by selecting a Persona.



Click **Send Test Email** to review the actual email appearance. Verify that all elements and appearance are displayed correctly.

Return to 1:1 Operations Manager, and then submit the treatment for review and approval.

Log in as a Content Lead to review and approve the treatment and attributes. Provide a comment, and approve the treatment to finish the task.

The email treatment is now available in the treatment library and can be associated with relevant customer actions.

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

- Features of the enhanced email authoring tool in Pega 1:1 Operations Manager.
- How to use the enhanced email authoring tool to create an email treatment.

Creating and managing customer journeys

Description

Customer journeys are the sum of the experiences that your customers go through when interacting with your organization. Rather than looking at just part of an experience or transaction, the customer journey documents the full spectrum of the customer experience. Customer journeys give you a familiar mental model to manage and work with their creative content. You can create customer journeys directly in Pega 1:1 Operations Manager and map customer actions to different journey stages.

Learning objectives

- Create a customer journey, set criteria, and manage Actions and Stages.
- Navigate through the Plan, Build, Generate, Test, and Deploy Stages of a customer journey.

Pega Customer Journeys

Customer journeys are a sum of the experiences that your customers go through while interacting with your enterprise. Rather than reviewing only part of an experience or transaction, the customer journey documents the full customer experience.

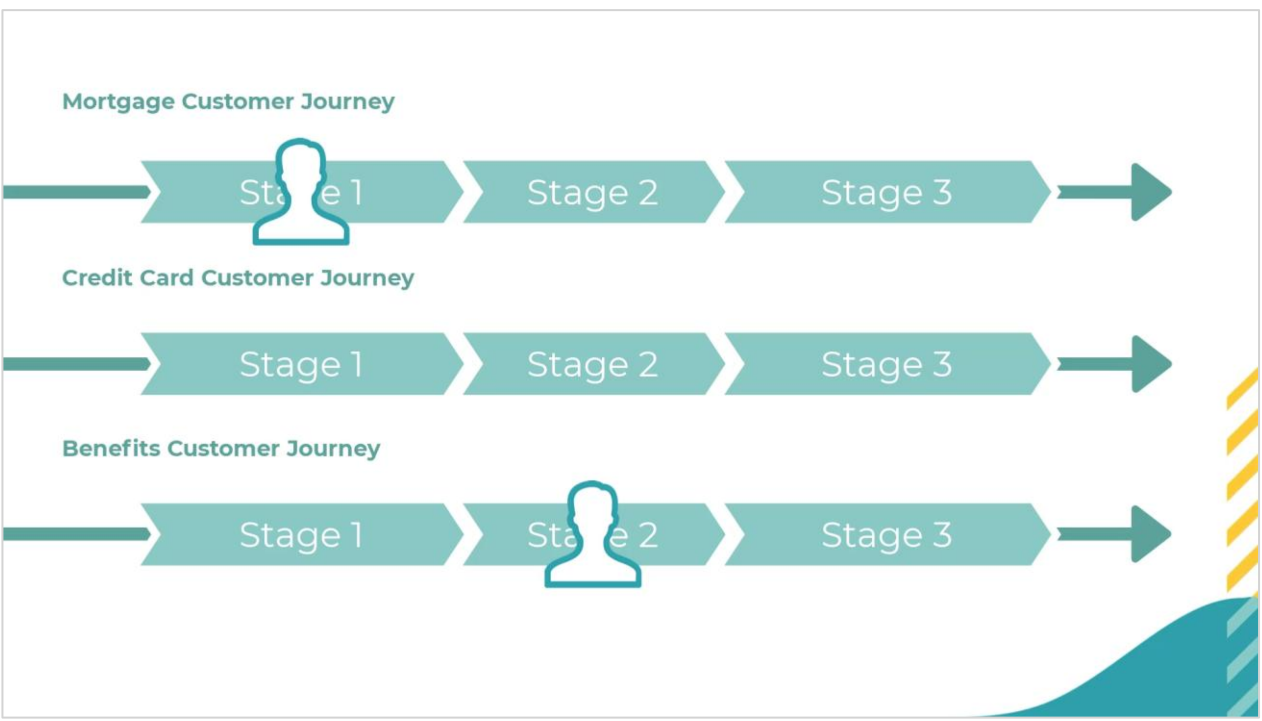
Transcript

Industry standard customer journeys are used to script the customer experience, which often results in a customer getting stuck on a path of offers that does not lead to a relevant outcome. Pega Next-Best-Action Customer journeys take a transformational approach to the industry standard tool that are the customer journeys.

Pega customer journeys and actions in them are prioritized using real-time AI, which provides you the following benefits:

- Allows you to build meaningful customer journeys
- Stays true to the Next-Best-Action paradigm
- Delivers a more relevant customer experience

With Pega customer journeys, customers might find themselves in multiple journeys or switching from one to another depending on what is most relevant to them at that point in time.

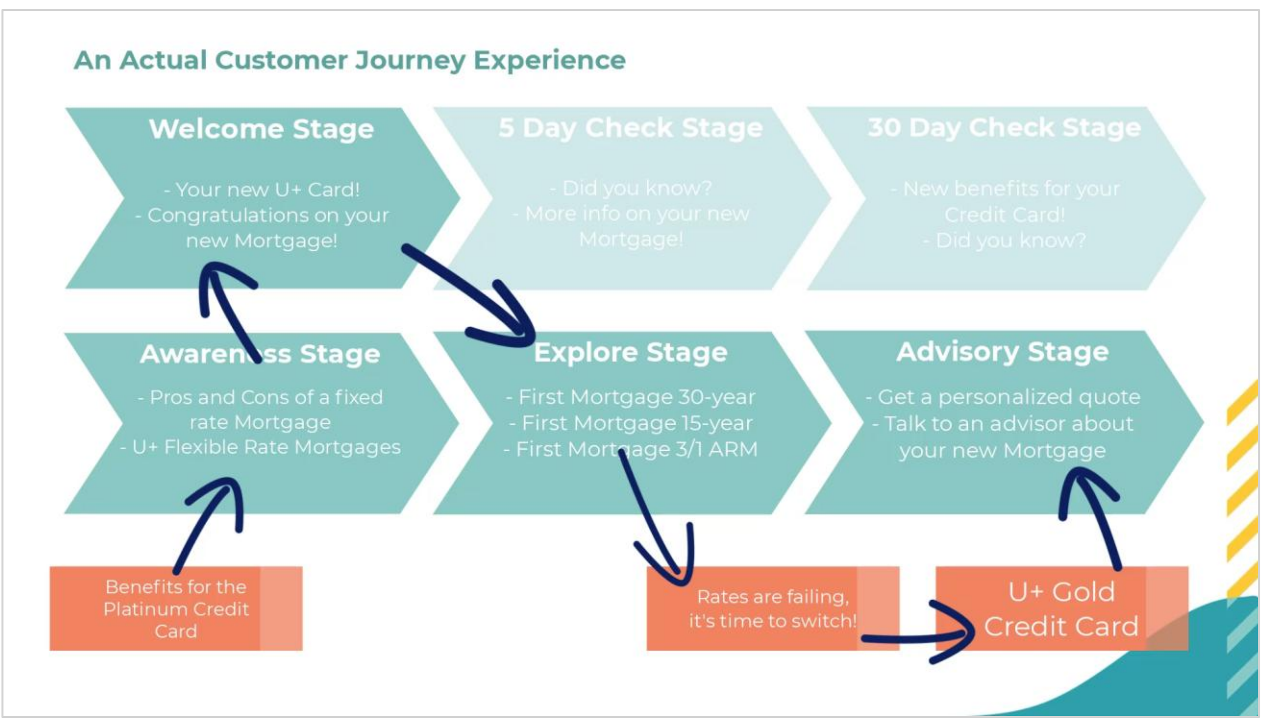


Customer journeys give you a helpful mental model and allow you to influence the customer experience while remaining true to the Next-Best-Action paradigm. Instead of scripting the entire customer experience offer-by-offer, you can add multiple journeys and stages with actions to your system and let AI leverage real-time data to determine which journey or action in a stage is most relevant to the customer at that time.

You can apply customer journeys to multiple business issues, for example:

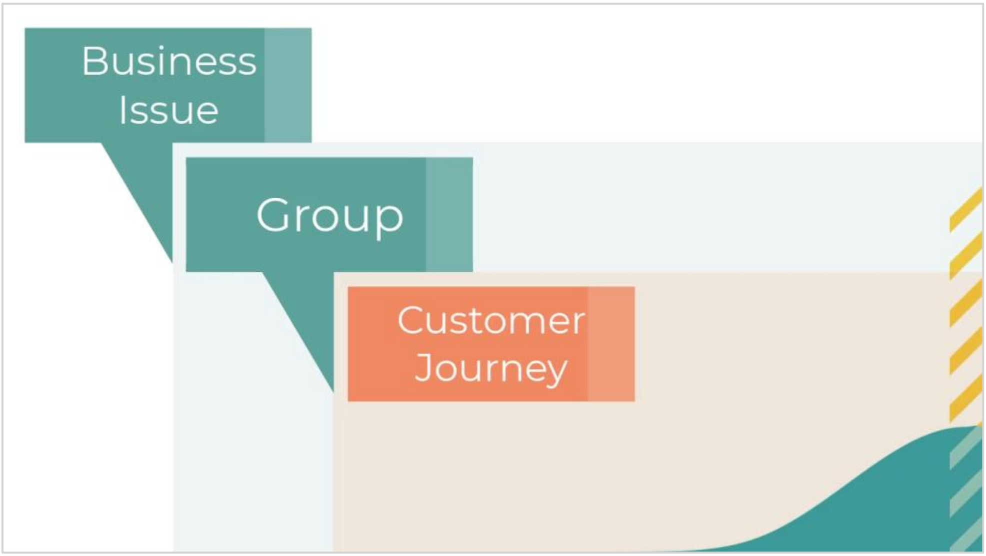
- Periodic check-ins during the onboarding period. You can have an initial welcome stage, followed by a five-day check stage, and then finally, a 30-day check stage.
- Familiarizing and leading the customer to a new mortgage. In this journey, we first raise awareness about mortgages, and then once familiar with the concept, we invite the customer to explore various mortgage offers. Finally, once engaged in the explore phase, we can provide an advisor to help the customer to develop a detailed mortgage offer.

Customers can be a part of many journeys, which are continuously prioritized. Customers can be in one stage of each of given journey, and then progress through the stages sequentially. The system ensures that the customer receives the most relevant action, even if an action is not a part of any journey, which means the actual customer journey might look very different from what you originally had in mind.



You manage customer journeys through 1:1 Operations Manager portal. There, you can define a customer journey and the business issue and group that it will be nested under, which means that this journey inherits the Engagement Policies of that business issue and group.

You can also set your journey to cover all issues and all groups for a broader scope of actions.

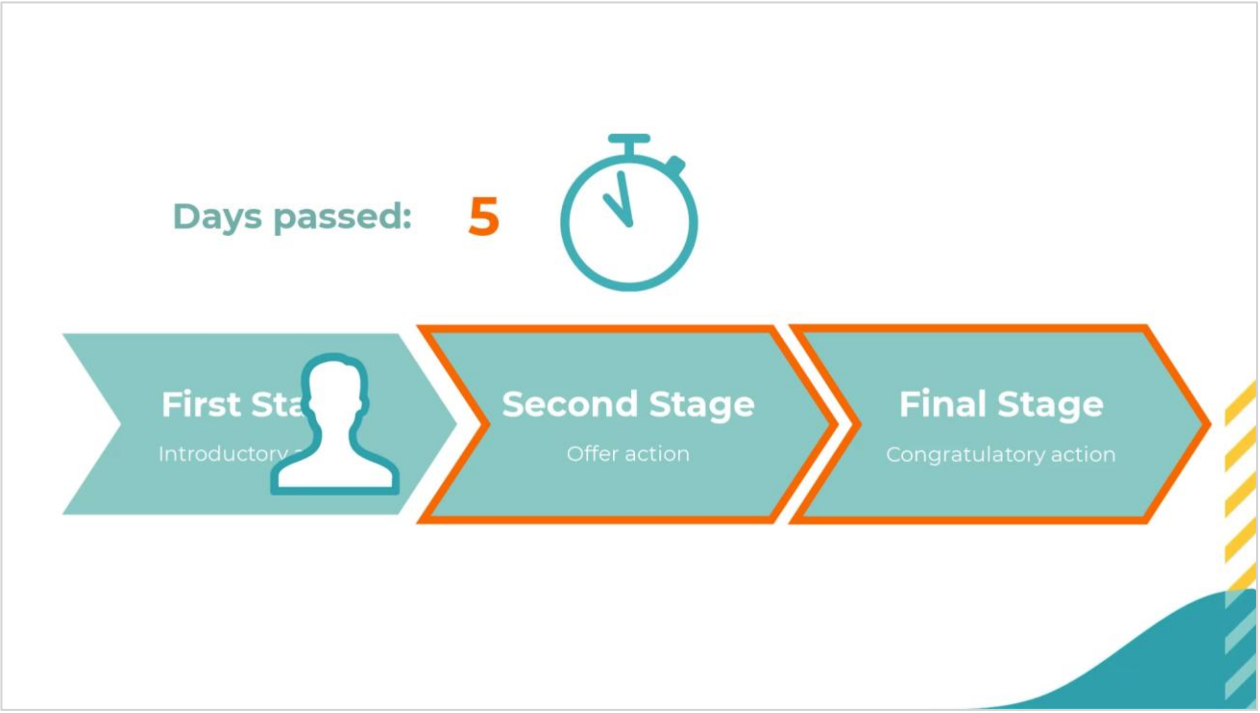


After setting up the journey, you define the number of stages and their names. The customer will progress through these stages in a sequential order. You then add relevant actions to each stage. The actions that you have added come with their available treatments. Customers in each stage see and interact with these actions, and the system recognizes these actions as a part of a particular stage in a customer journey.

If you add an action to a customer journey, you can decide if you present the action as only part of the journey, or both as a part of the journey and as a standalone action. The system records interactions for the action separately.

Before customer progresses from one stage to another, they need to satisfy the entry criteria of the next stage. It is not recommended to use very rigid entry criteria with multiple conditions, as the AI can guide the customer through different journeys and standalone actions.

Entry criteria can be as simple as 30 days passing since the customer has joined the bank and as complex as a customer having engaged with a set of mortgage offers in the last week, showing interest in talking to an advisor.



Take a look at an example of how entry criteria work and where they start to take effect in the prioritization. Say your system has 30 actions, and it is time to present the best three of them to a particular customer. The 12 orange actions are a part of various customer journeys.

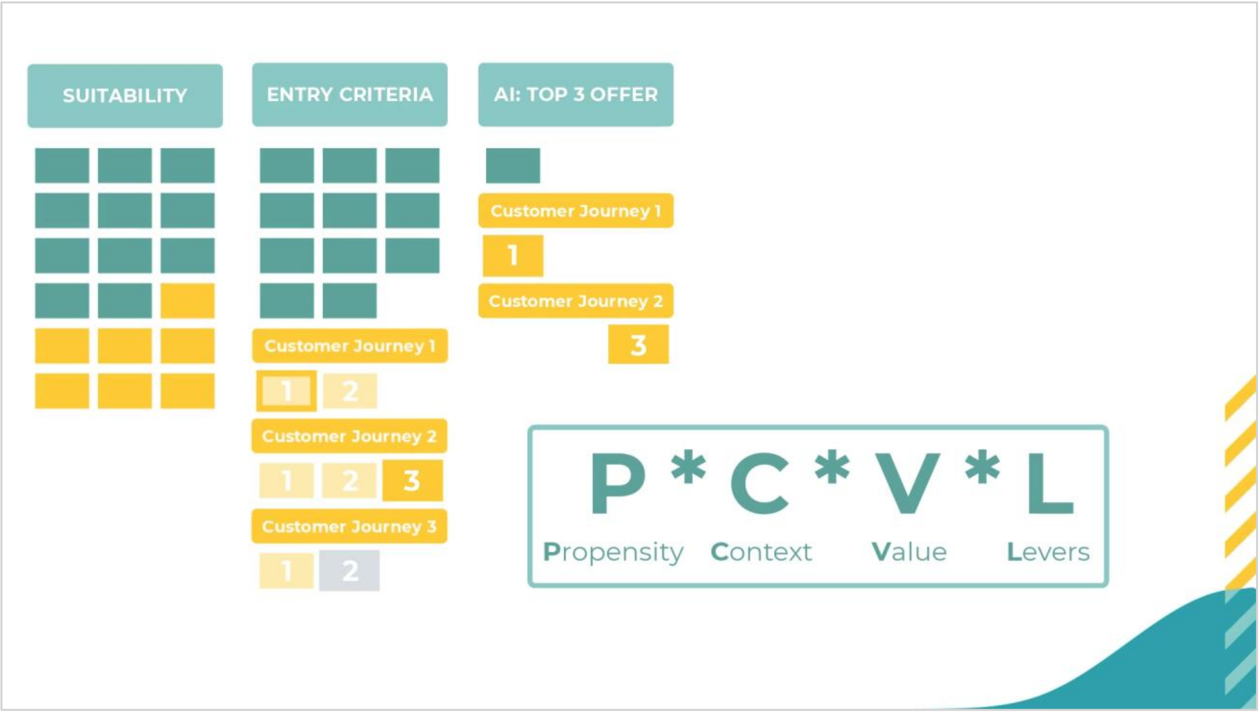
First, the system applies the standard engagement policies. Consequently, the eligibility, applicability, and suitability policies of the business issue, group, and actions are applied, which leaves us with 18 actions, out of which, seven are part of various customer journeys.

Now let's expand to see that the customer journey actions are a part of different journeys, and that each action is a part of a different stage. As you can see, different actions are relevant for the customer in the various stages due to the entry criteria set up by the Decisioning Architect. In this example, the customer:

- Passes the entry criteria to the first stage in the first journey
- Is in the third stage of the second journey, and it passes its entry criteria
- Is in the second stage of the third journey, but it does not pass its entry criteria

From the seven actions, which progressed through the suitability and are part of a journey, the customer actually qualifies for only the two highlighted actions.

At this point, AI selects among the 13 actions the best three actions to show to the customer based on the PCVL calculation (propensity * context * value * levers).



In summary, each component of the policy filters the initial set of 30 actions:

- 24 eligible
- 21 applicable
- 18 suitable

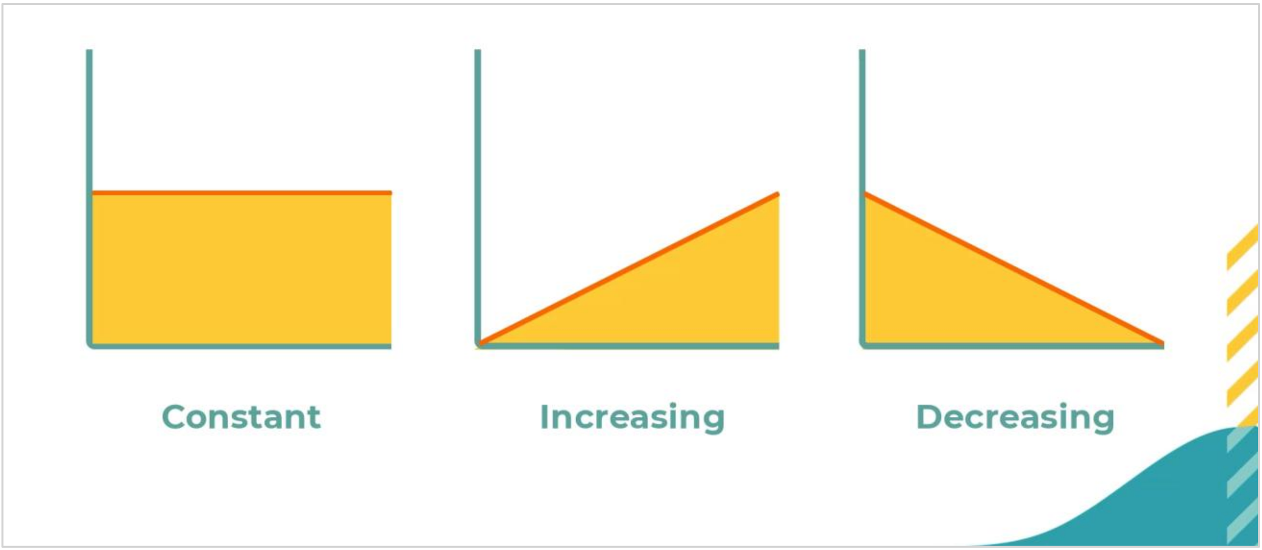
From the 18 suitable actions, 11 are standalone, not part of any journey and two actions from the remaining seven pass the entry criteria from the various journeys and stages defined. The remaining 13 actions, which pass the conditions are prioritized by the AI, and then, the best three are selected. The selected actions can be one of the standalone actions, an action from a journey, or an action from a journey that is already in progress.

Customer journeys can influence the PCVL formula in two ways.

The first way to influence the propensity occurs passively as you add customer journeys to your system. Customer journeys come with predictors that begin to function as your customers interact with the journeys that you have designed for them. These predictors will influence the propensity directly.

The second way is to use stage upweighting. Stage upweighting applies a numerical upweight value to actions in that stage and is used to increase or decrease actions promotion level. You can apply it to any stage, and it is a part of the Business levers in the Arbitration.

Upweighting can be constant, increasing or decreasing over time. For example, you might want to upweight actions of a stage for the first 10 days that the customer is in this new stage. During the first 10 days, the upweight will decrease steadily to avoid annoying the customer with a single offer.



In summary, customer journeys provide a good mental model for managing content and influencing next-best-action decisions to present suitable actions seamlessly for your customers.

Creating a customer journey

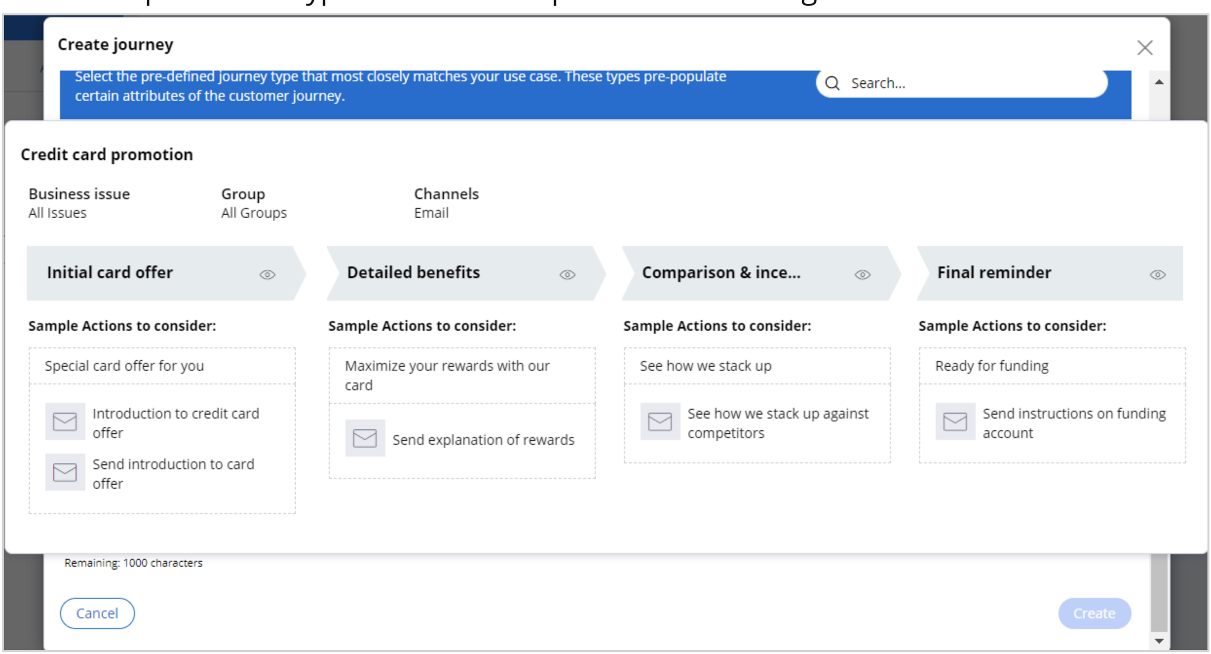
Customer journeys encompass all customer experiences that are related to completing an objective. Journeys can involve complex Stages or be very simple. These journeys provide a mental model for managing the different Actions by highlighting any gaps in content toward achieving the objective. Customer journeys also influence Next-Best-Action decisions, which lead to more consistent and improved customer outcomes.

Transcript

This video shows you how to manage and optimize customer engagement strategies by using customer journeys.

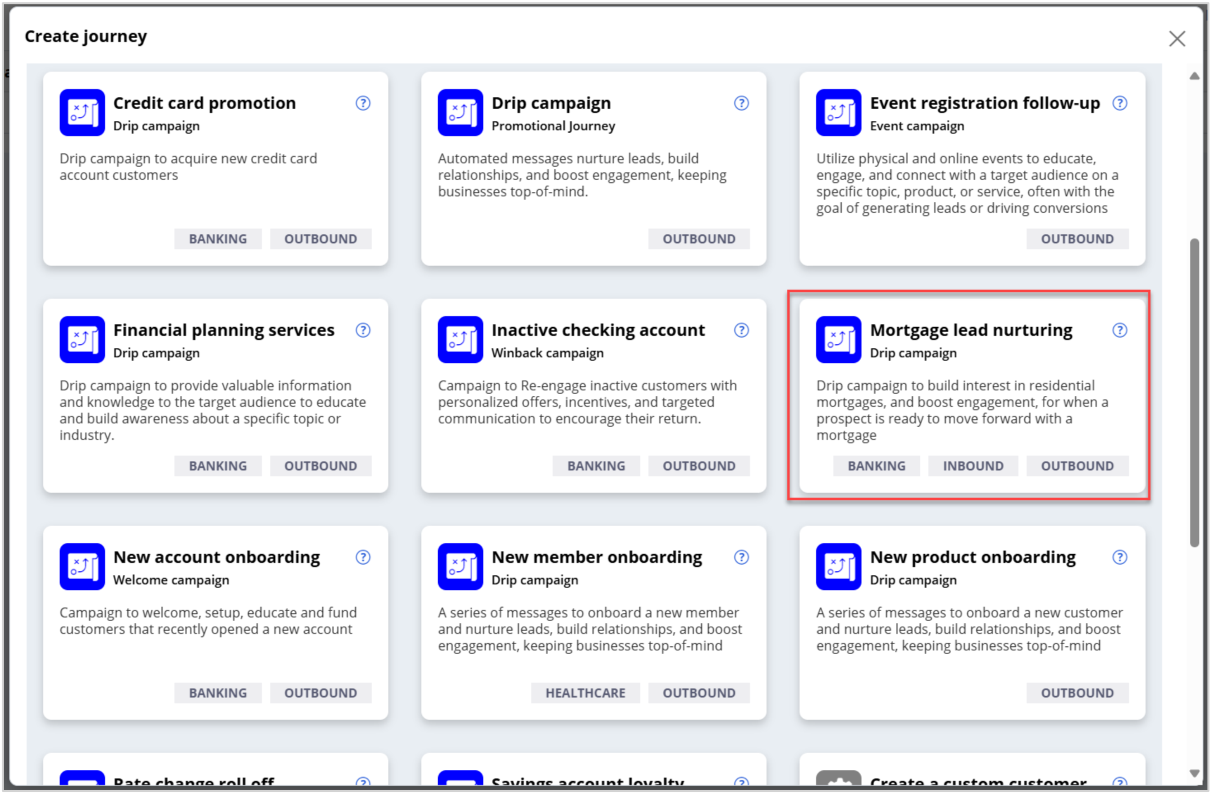
U+ Bank wants to use a customer journey to increase the number of mortgage applications from qualified customers. By using customer journeys, U+ Bank puts Actions and treatments into Stages in a sequential format that guides customers toward mutually beneficial outcomes.

To implement this use case, a business user first creates a customer journey in Pega 1:1 Operations Manager. In the **Create journey** window, you can select the predefined journey type that most closely matches the use case, or you can create a custom journey request. To preview what the journey might look like, click the **Help** icon on the tile. You can view examples of the types of Actions expected at each Stage.



Using the predefined journey type automatically populates certain data in the change request.

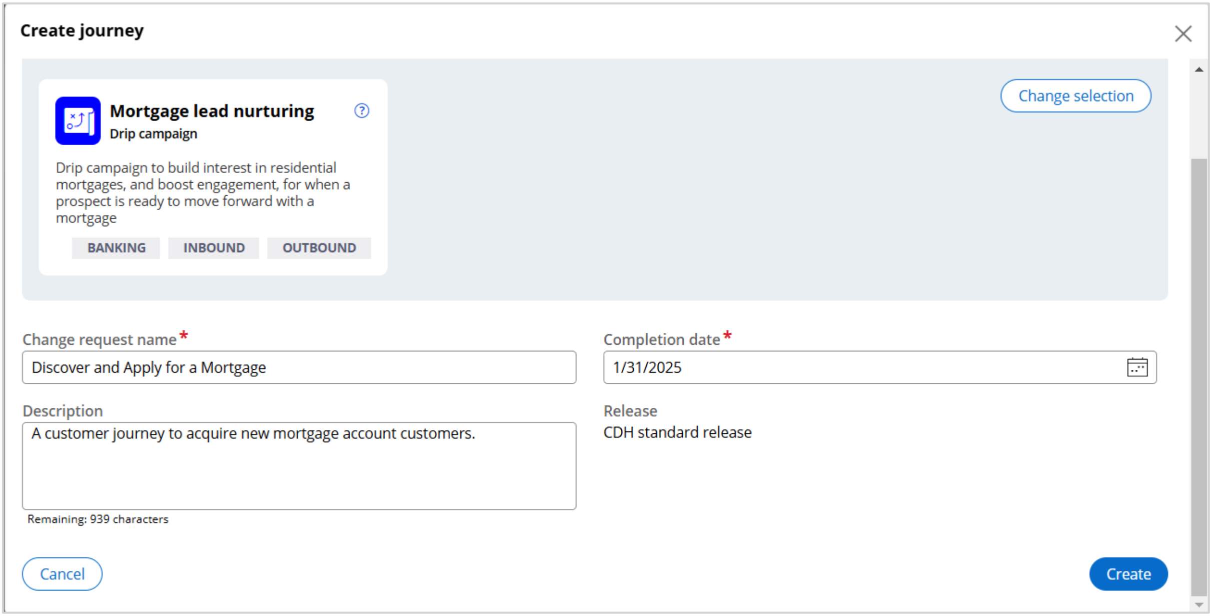
The bank wants to introduce a journey for mortgages to acquire new customers, so select the category **Mortgage lead nurturing**.



A new journey creation results in a change request creation. 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 NBA Specialists complete the request.

You can use the **Description** section to provide any additional business details that are useful for the NBA Specialists.



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

The change request is currently in the **Create** Stage. Proceed further to complete the journey details.

In the **Define journey details** section, enter a name for the new customer journey. In this example, enter Discover and Apply for a Mortgage.

Select the appropriate business issue and group if you know it. In this example, you select the **Grow** issue and **Mortgages** group. You can change these details in collaboration with the NBA Specialist.

If you want to include actions from multiple business issues and groups in your journey, select **All Issues** and **All Groups**. In the **Journey description** field, enter relevant information about the customer journey and its outcomes.

There are three options to determine which Stage the system considers during Action arbitration:

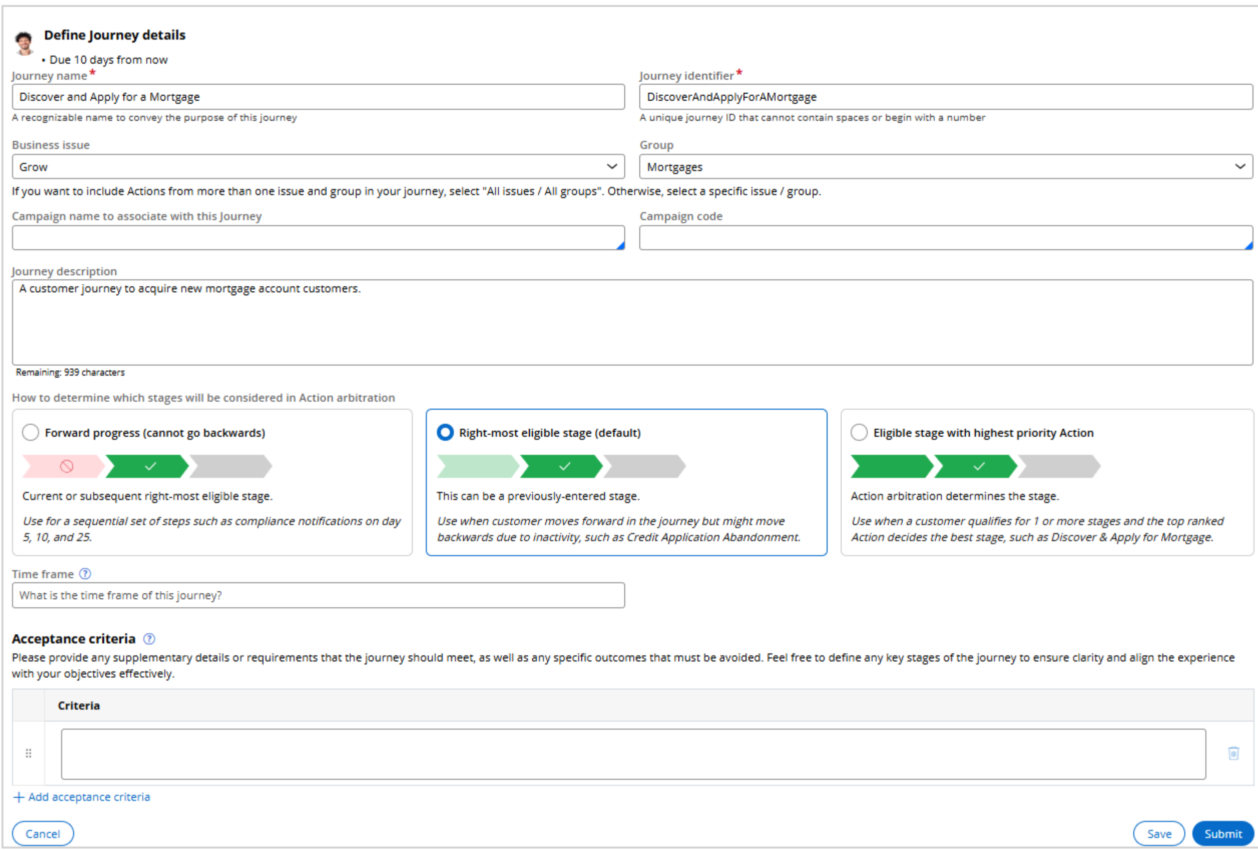
- Forward progress (cannot go backwards)
- Right-most eligible stage (default)
- Eligible Stage with highest priority Action

In this example, retain the default option, Right-most eligible stage (default).

Optionally, to indicate the total duration a person can spend on a journey, enter the value in the **Time frame** field.

In the **Acceptance Criteria** section, in the **Criteria** field, enter the requirements that the customer journey must meet. You can also attach a document to this change request that provides a brief overview of the requirements, criteria for the journey, and the desired outcome.

If you selected any of the predefined customer journey types at the beginning, some information might be prepopulated by default.

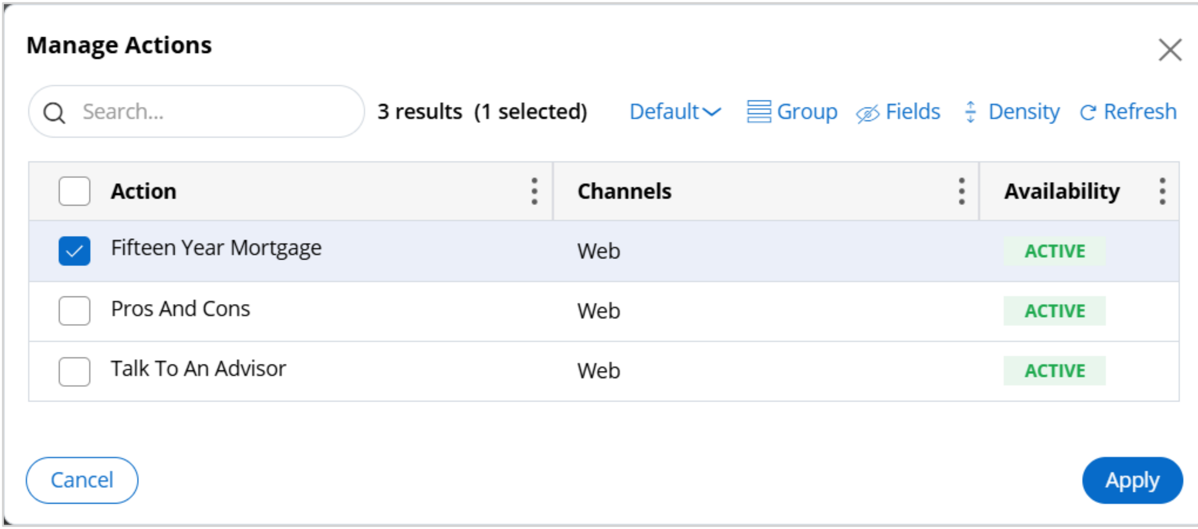


Now, you can follow the typical change management process to prioritize, define a peer reviewer if required, and assign the task to the NBA Specialist.

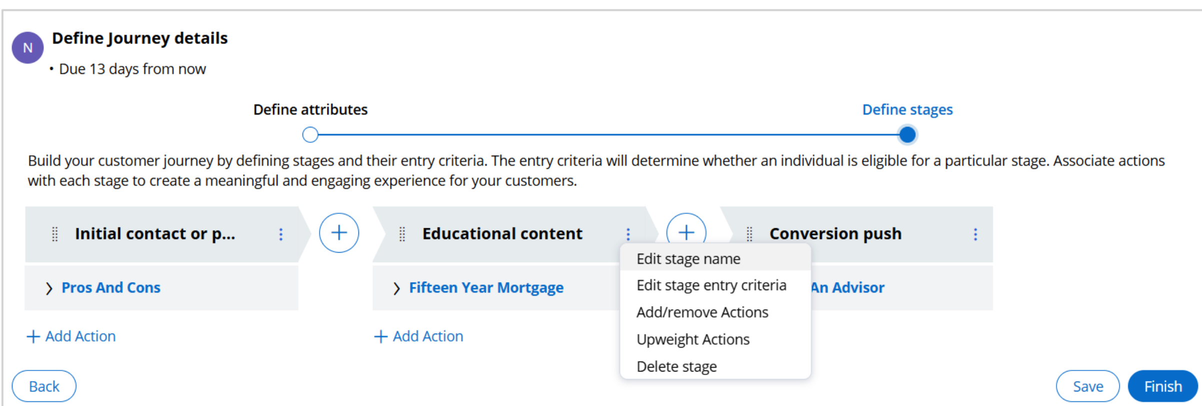
Build your customer journey by adding or deleting Stages, Actions, and defining the entry criteria. If you selected any of the predefined customer journey types at the beginning, some of the information might already be included by default.

You can modify any journey Stage details, add entry criteria, upweight Actions, or add more Actions to a Stage.

To add an Action to the Stage, select the desired action from the list in respective Stage. You can add more than one Action to each Stage.

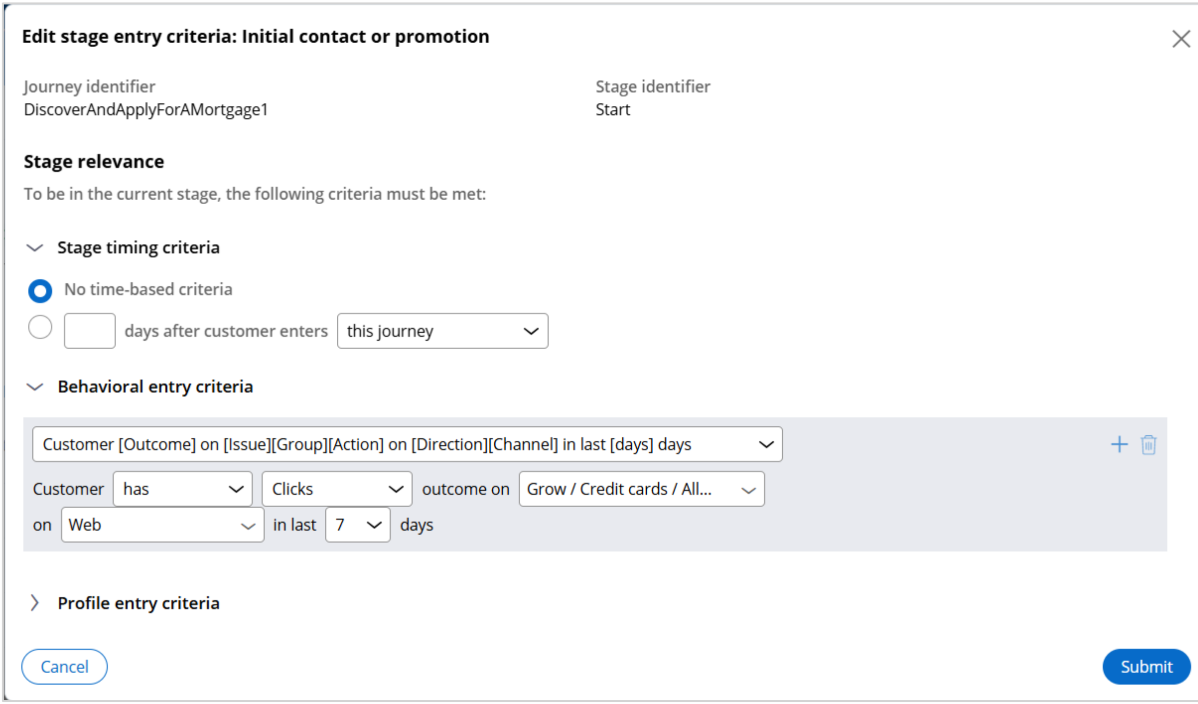


Now, add the entry criteria that determine whether an individual is eligible for a particular Stage of the journey.

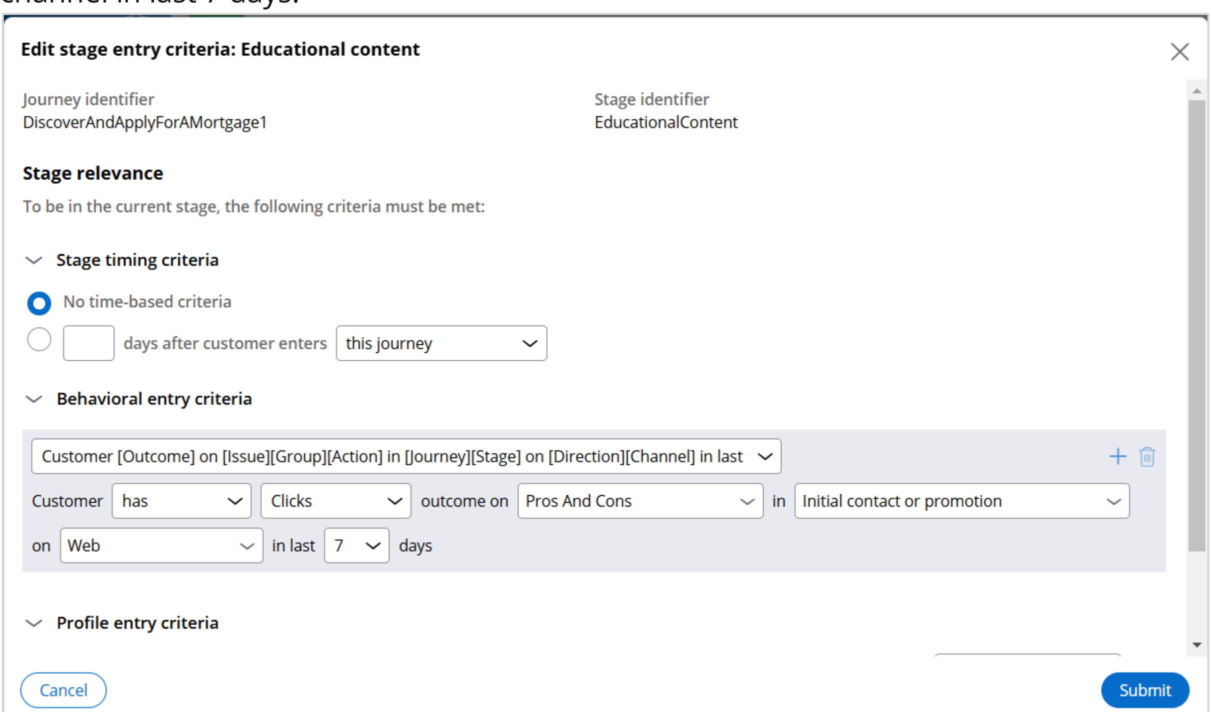


You can enter items in the **Behavioral entry criteria** section to use a previously curated set of common conditions that help you build entry criteria for the journey Stage or use the **Profile entry criteria** section to select the context and the set of conditions that define the Stage entry Rules.

In this example, the behavioral entry criteria to enter the first Stage is that customer must have clicked on any item from the Grow/Creditcards issue/group on the Web channel in last 7 days.



To enter the second Stage, the customer must have clicked on the Pros and Cons item from the Grow/Mortgages issue/group in the Initial contact or promotion stage on the Web channel in last 7 days.



Create a similar entry criteria for the third Stage.

The system generates all the artifacts that are necessary to output this customer journey.

The NBA Specialist can now review and validate the generated artifacts.

Finally, 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 and approve the change request configured by the Specialist.

After approval, the system makes changes available or submits them 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 create a customer journey, set criteria, and manage Actions and Stages.
- How to navigate through the Plan, Build, Generate, Test, and Deploy Stages of a customer journey.