1:1 Customer Engagement

Business User

*""I want to develop offers or messages (Actions),
which will be delivered to the end customers through Next-Best-Action"*

Goals

- Leverage outcome and improve performance of existing actions
- Test hypotheses for new actions
- Ideate and plan for engagement activities
- Make change requests for Next-Best-Action Specialists and Next-Best-Action Designers to execute
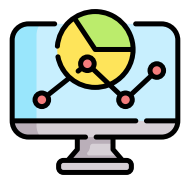- Review and approve Action content and distributions

Key drivers

- Conversion rate
- Lift over control
- Engagement rate
- Response rate
- Improvement rate
- Churn rate
- Net Promoter Score (NPS)

Tools

- Jira/ Agile Studio
- 1:1 Operations Managers
- Excel & Powerpoint

Main stakeholders

Next-Best-Action Analyst
Get ideas to market quickly
1:1 Operations Manager
Assist with formalizing / documenting business requests into well-specified requirements for Next-Best-Actions
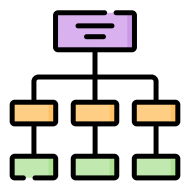
Next-Best-Action Specialist
Implement and test actions and track performance
1:1 Operations Manager
Receive change requests to create, modify, and test offers and messages

Team Leader
Manage the day-today activities required to support the scrum team
1:1 Ooperations Manager
Executive Agile ceremonies, unblock issues and manage deployment into the production environment

Data Scientists/ Analyst

"I want to design, maintain, deploy, and refresh the predictive analytics assets utilized by the Next-Best-Action decision engine."

Goals

- Develop, monitor and maintain predictive and adaptive models
- Ensure modeling best-practices
- Regularly assess quality, completeness, and value of modeling data sources
- Support predictive performance reporting and analysis
- Leverage existing models or utilize 3rd-party model services through Pega
- Map enterprise data to attributes within the Next-Best-Action solution
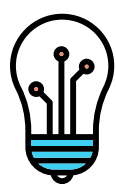- Provide input on the Next-Best-Action framework

Key drivers

- Lift
- Accuracy of model
- Monitoring of model

Tools

- 1:1 Operations Manager
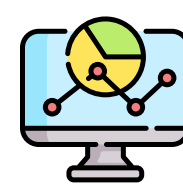- Prediction Studio

Main stakeholders

Business User

Leverage Next-Best-Action solutions to drive performance and meet goals

1:1 Operations Manager

Come up with the offers or messages that will be delivered through Next-Best–Action
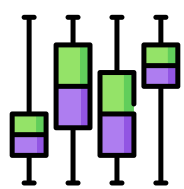
Next-Best-Action Analyst

Get ideas to market quickly

1:1 Operations Manager

Assist with formalizing / documenting business requests into well-specified requirements for Next-Best-Actions.
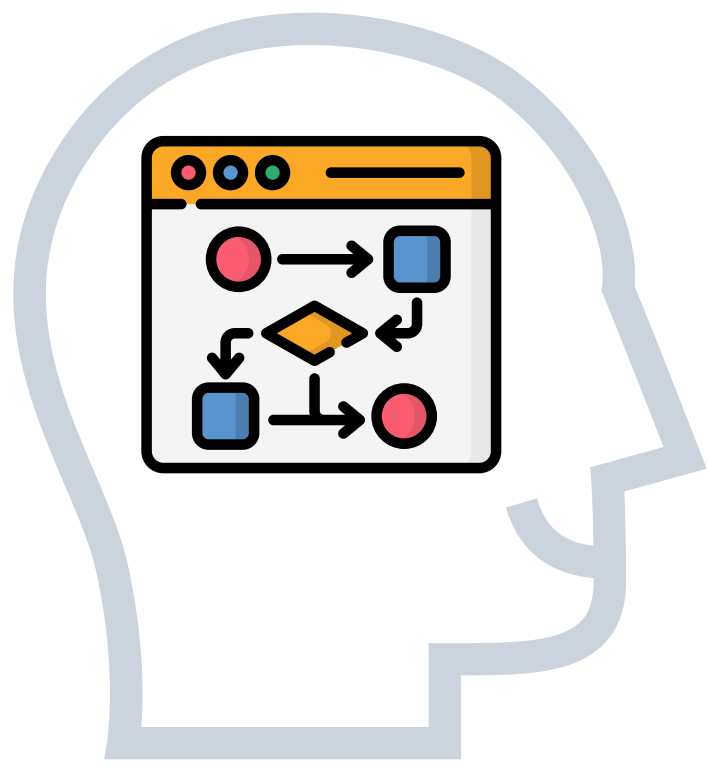
Next-Best-Action Designer

Specify and design decision management strategies

1:1 Operation Manager, Customer Decision Hub

Oversee the centralized Next-Best-Action system for all business units, balancing business and customer needs

Decision Architect

"I want to provide business and technical leadership so that I can guide and resolve contention between customer, segment or product objectives."

Goals

- Provide application leadership vision across scrum teams
- Enable and mentor the other application configurators
- Optimize the decision framework
- Ensure re-use and best practices are adopted across scrum teams
- Maximize use of insights, analyzes, and reports
- Ensure consistency in communications across inbound and outbound channels
- Maintain good quality of assets implemented by NBA Designers and NBA Specialists
- Determin sources for data required to support Offers, Propositions, Models etc.
- Develop the data refresh strategy
- Define the interfaces needed to retrieve the data
- Define and implement the mapping required to map enterprise data to attributes within the NBA solution

Key drivers

- Objectives of the business case

Tools

- Customer Decision Hub
- Dev Studio
- Prediction Studio
- App Studio

Main stakeholders

NBA Analyst
Analyze action versus business outcomes
1:1 Operations Manager
Work together on reports and optimizes accept rate
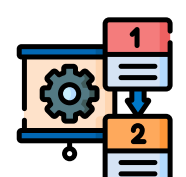
Data Scientist
Setup and maintain predictions
Predicition Studio
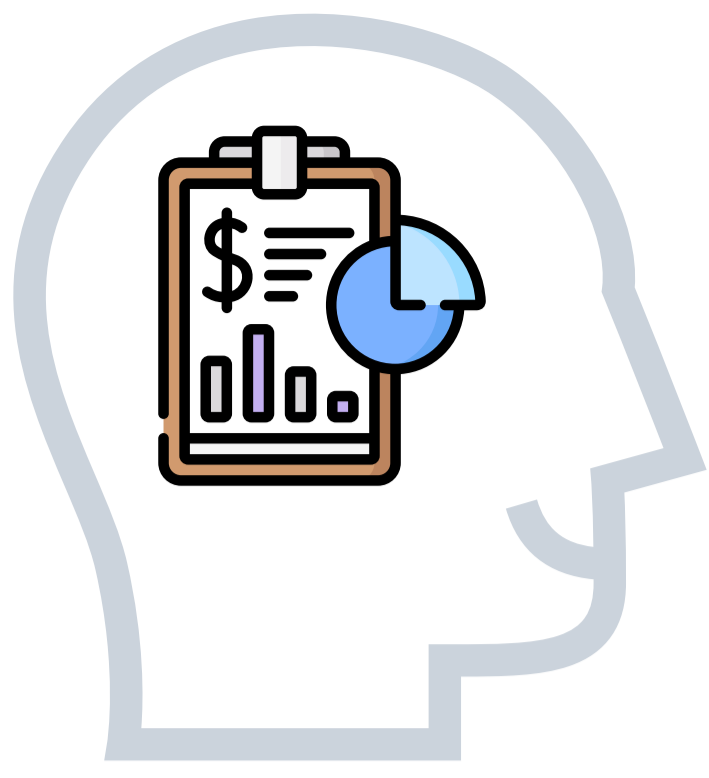Work together on optimizing prediction vs decisioning

System Architect
Setup and maintain Pega platform
Dev Studio
Help decision architect access data

Head of Enterprise 1:1 Engagement

"I want to prioritize, groom backlog, and ensure the benefits of Next-Best-Action are maximized."

Goals

- Ensure the business benefits of NBA are maximized and worth the investment
- Be the conduit between various stakeholders and enablers across teams
- Manage prioritization and grooming of backlog
- Drive enterprise decision management roadmap
- Maximize business benefits
- Manage governance forum and processes
- Engage Information Technology team to deliver application changes
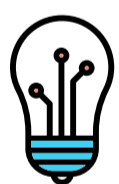
Key drivers

- Marketing return on investment (MROI)
- Time to value
- Governance score

Tools

- 1:1 Operations Manager
- Customer Decision Hub

Main stakeholders

Business User
Leverage Next-Best-Action solutions to drive performance and meet goals

1:1 Operations Manager

Come up with the offers or messages that wil be delivered through Next-Best-Action

Team Leader
Manage the day-to-day activities required to support the scrum team

1:1 Operations Manager

Execute Agile ceremonies, unblock issues and manage deployment into the prodction environment

Next-Best-Action Analyst
Get ideas to market quickly

1:1 Operations Manager

Assist with formalizing/ documenting bsuiness request into well-specified requirements for Next-Best-Actions.

Next-Best-Action Analyst

"I want to assist stakeholders with formalizing and documenting requests, to get their ideas to market quickly."

Goals

- Help translate business ideas and concepts into well-specified requirements for Next-Best-Actions
- Ensure the potential value associated with an offer/action
- Build business cases to substatiate investment that can be tracked, evaluated, and used as investment proxies
- Guide and educate business stakeholders, often triaging or modifying requires to keep them aligned with governance or mandates

Key drivers

- Team efficiency
- Time to value ration
- Cost per Next-Best-Action

Tools

- Jira/ Agile Studio
- 1:1 Operations Manager

Main stakeholders

Business User
Leverage Next-Best-Action solutions to drive performance and meet goals

1:1 Operations Manager

Come up with the offers or messages that will be delivered through Next-Best-Action
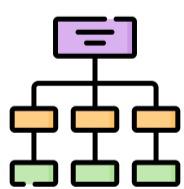
Team Leader
Manage the day-to-day activities required to support the scrum team

1:1 Operations Manager

Execute Agile ceremonies, unblock issues and manage deployment into the prodction environment
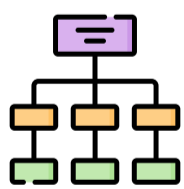
Next-Best-Action Specialist
Implement and test actions and track performance

1:1; Operations Manager

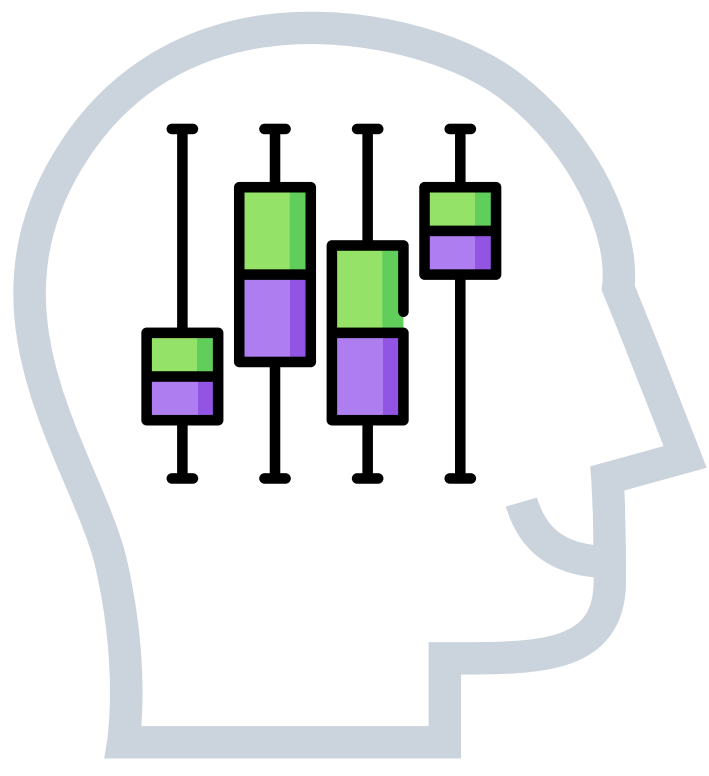Receive change requests to create, modify, and test offers and messages

1:1 Customer Engagement

Next-Best-Action Designer

"I want to specify and design decision management strategies for all business units, balancing business and customer needs."

Goals

- Standardize a governance process and structure for Next-Best-Action across business units
- Deliver a relevant experience for customers across channels
- Set up process and structure
- Coordinate efforts across teams
- Arbitrate strategies to ensure the right offers are being made
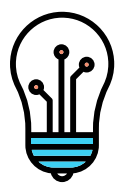- Analyze business outcomes

Key drivers

- Impressions, clicks, and converstions by channel
- Churn rate
- Retention rate
- Net revenue
- Return on marketing investment (ROMI)
- Owned media spend
- Paid media spend

Tools

- 1:1 Operations Manager
- Customer Decision Hub

Main stakeholders

Business User
Leverage Next-Best-Action solutions to drive performance and meet goals
1:1 Operations Manager
Request create of and revision to business area Next-Best-Action policies

Next-Best-Action Analyst
Get ideas to market quickly
1:1 Operations Manager
Assist with formalizing / documenting business requests into well-specified requirements for Next-Best-Actions
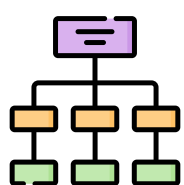
Team Leader
Manage the day-to-day activities require to support the scrm team
1:1 Operations Manager
Executive Agile ceremonies, unblock issues and manage deployment into the production environment
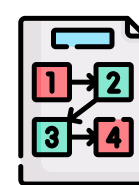
QA Testers
Manage testing process, ensuring changes meet the expected outcome
1:1 Operations Manager Customer Decision Hub
The description can span one or two lines, which will line wrap it to the next row

Data Scientist/ Analyst
Design, maintain, deploy, and refresh the predictive analytics assets
Prediction Studio
Prodvie input on the Next-Best-Action framework and map enterprise data to attributes within it

Next-Best-Action Specialists

"I want to implement and test offers and messages (Actions), and track live performance of Next-Best-Action."

Goals

- Efficiently support stakeholders by translating business strategies into successful outcomes
- Engage customers in the most relevant way
- Support the definition and assessment of business requirements
- Translate business needs into Next-Best-Action artifacts
- Build and test artifacts to understand impact
- Monitor Next-Best-Action performance

Key drivers

- Task cycle time
- Quality of tasks

Tools

- 1:1 Operations Manager

Main stakeholders

Business User
Leverage Next-Best-Action solutions to drive performance and meet goals
1:1 Operations Manager
Request creation of offers and messages, reviews and approves content and distributions

Next-Best-Action Analyst
Get ideas to market quickly
1:1 Operations Manager
Assist with formalizing /document requests and getting ideas to market quickly
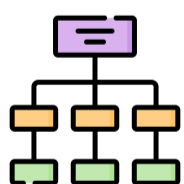
Team Leader
Manage the day-to-day activities required to support the scrum team
1:1 Operations Manager
Execute Agile ceremonies, unblock issues and manage deployment into the production environment
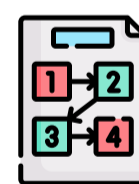
QA Testers
Manage testing process, ensuring changes meet the expected outcome
1:1 Operations Manager, Customer Decision Hub
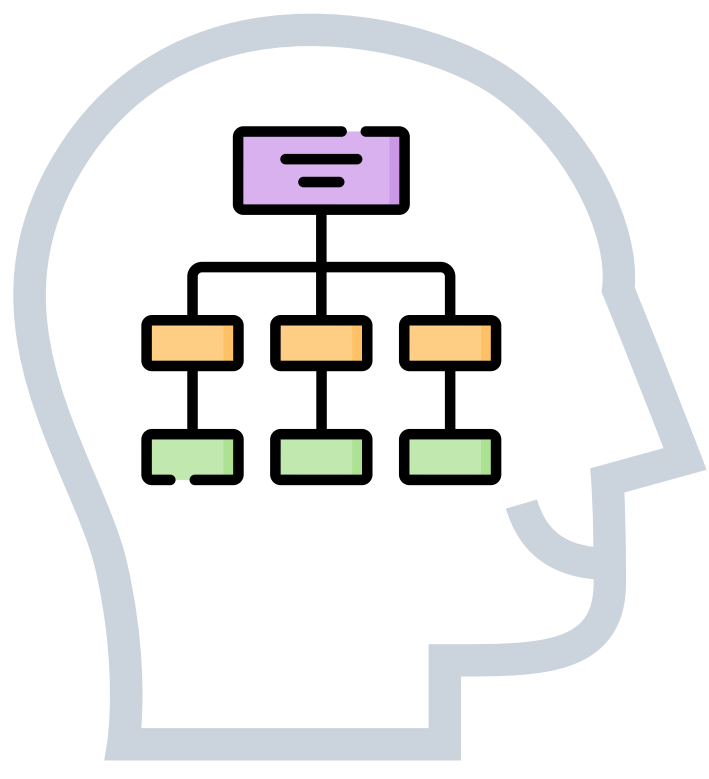
Team Leader

"I want to execute Agile ceremonies, unblocking issues, while managing the day-to-day activities required to support the scrum team."

Goals

- To set the team up for success
- To manage work in compliance with change management best practices
- Run daily stand up, show & tell, and sprint retrospective meetings
- Remove blockers impeding team progress
- Ensure compliance with change management best practices & policies
- Work with Information Technology team on deployments

Key drivers

- Team velocity
- Backlog health

Tools

- Jira/ Agile Studio
- 1:1 Operations Manager
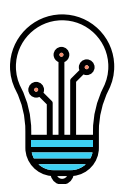
Main stakeholders

Business User
Leverage Next-Best-Action solutions to drive performance and meet goals
1:1 Operations Manager
Come up with the offers or messages that will be delivered through Next-Best–Action.
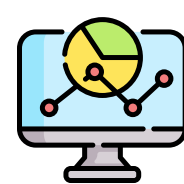
Next-Best-Action Analyst
Get ideas to market quickly
1:1 Operations Manager
Assist with formalizing / documenting business requests into well-specified requirements for Next-Best-Actions

Next-Best-Action Specialist
Implement and test actions and track performance
1:1 Operations Manager
Receive change requests to create, modify, and test offers and messages

Next-Best-Action Designer
Specify and design decision management strategies
1:1 Operations Manager, Customer Decision Hub
Oversee the centralized Next-Best-Action system for all business units, balancing business and customer needs

Quality Assurance (QA) Tester

"I want to manage the testing process, ensuring that changes meet the expected outcome."

Goals

- Help the operational teams execute changes that meet desired outcome
- Create and follow testing best-practices
- Prepare unit test scenarios for all changes to the Next-Best-Action solution
- Manage unit testing for all changes
- Provide on-going support for all testing

Key drivers

- Test execution rate
- Test passed rate
- Quality control
- Test automation rate

Tools

- 1:1 Operations Manager
- Customer Decision Hub
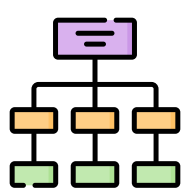
Main stakeholders

Team Leader
Manage the day-to-day activities required to support the scrum team

1:1 Operations Manager

Execute Agile ceremonies, unblock issues and manage deployment into the production environment.
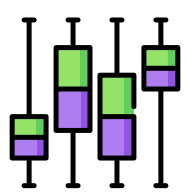
Next-Best-Action Designer
Specify and design decision management strategies

1:1 Operations Manager, Customer Decision Hub

Oversee the centralized Next-Best-Action system for all business units, balancing business and customer needs
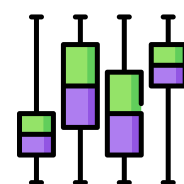
Next-Best-Action Specialist
Implement and test actions and track performance

1:1 Operations Manager
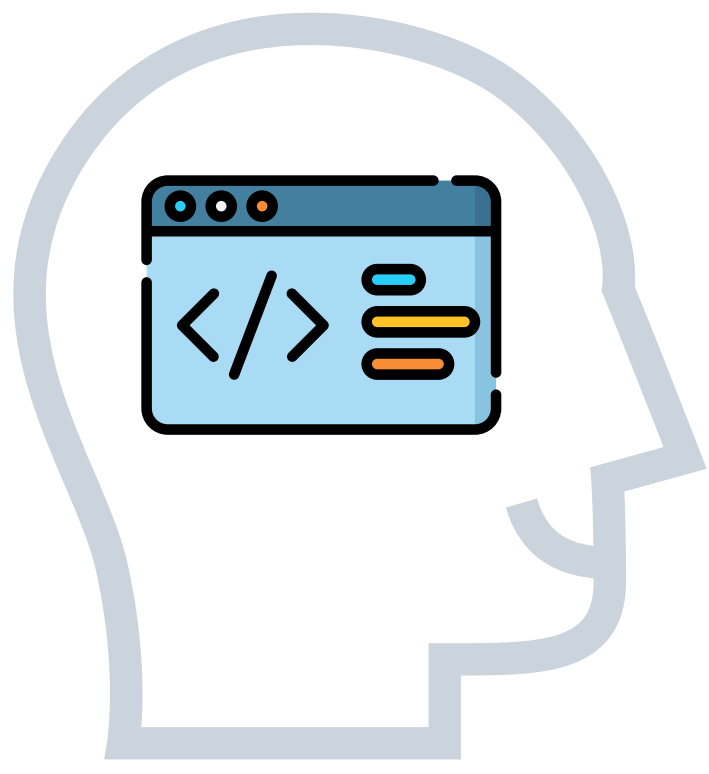
Receive change requests to create, modify, and test offers and messages

Account Administrator

"I am an authorized person for Pega Cloud account"

Goals

- First user to setup the account
- Define users and roles
- Monitors overall Pega cloud account
- Need to take purchase decisions

Key drivers

- Optimal usage of cloud account
- Customer success by using right infrastructure and applications

Tools

- My support portal (Client self service)

Main stakeholders

All Account Users
Customer account users
My Support Portal
Collaborates with them on various aspects of managing the account and built applications

Account Executive
Responsible for product sales
Pega Sales
Collaborates for account plans and pricing

Pega Support Users
Supports customers with ongoing issues
Pega Support Portals
Collaborates with them for getting Pega side support

Account Users

Cloud Support Contact

"Responsible for cloud support activities"

Goals

- Raise necessary support requests
- Monitor cloud health
- Make sure have right infrastructural configurations

Key drivers

- Cloud Health

Tools

- My support portal (Client self service)
- PDC

Main stakeholders

All Account Users
Customer account users
My Support Portal
Collaborates with them on various aspects of managing the account and built applications

Pega Support Users
Supports customers with ongoing issues
Pega Support Portals
Collaborates with them for getting Pega side support

Cloud System Contact

"I need to decide the best time to maintain my cloud account"

Goals

- Setup maintenance windows for customer account

Key drivers

- Maintain cloud account without any hassels

Tools

- MSP

Main stakeholders

All Account Users
Customer account users
My Support Portal
Collaborates with them on various aspects of managing the account and built applications

Pega Support Users
Supports customers with ongoing issues
Pega Support Portals
Collaborates with them for getting Pega side support

Security Contact

"Responsible for security of Pega cloud and my applications"

Goals

- Receive security incident
- Review and respond to security alerts
- Raise security incident

Key drivers

- Security of the applications
- Customer success by using right infrastructure and applications

Tools

- My support portal (Client self service)
- Other clients own applications

Main stakeholders

All Account Users
Customer account users
My Support Portal
Collaborates with them on various aspects of managing the account and built applications

Pega Support Users
Supports customers with ongoing issues
Pega Support Portals
Collaborates with them for getting Pega side support
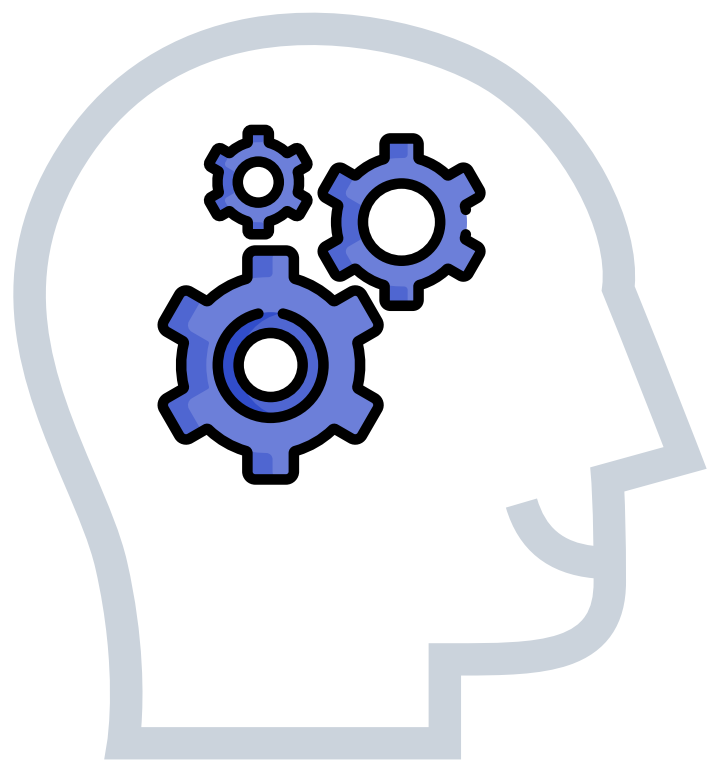
Application Admin

"Ensure the security of the application"

Goals

- Define users and access controls

Key drivers

- Security policies

Tools

- DevStudio

Main stakeholders

Developers
Business customer applications
Any Team

Works collaboratively to develop the applications

IT Team
Maintain the users and security policies
Any Team

Collaborates with them for updates on security policies

Developer

"Develop appplications for business needs"

Goals

- Develop business applications

Key drivers

- Following Pega best practices

Tools

- DevStudio
- All studios
- PDC

Main stakeholders

Development Team
Business customer applications

Any Team

Works collaboratively to develop the applications

Manager
Manager of the development team

Any Team

Collaborates with manager on the status of development on a regular basis

Business Users
Understands the business needs

Any Team

Collaborates with them to understand the business needs

End Users
Users for the customer built application

Any Team

Collaborates with them to understand the users needs

Product Architect

"Create architecture that is scalable and secure"

Goals

- Create architecture which meets the business needs

Key drivers

- Guardrail compliance

Tools

- DevStudio
- Khibana
- PDC

Main stakeholders

Developers
Builds customer applications

Any Team

Works collaboratively to develop the applications

Business Users
Understand the business needs

Any Team

Collaborates with them to understand the business needs

Product Support Contact

"Team leader responsible for getting resolution for their issues"

Goals

- Manage and define applications

Key drivers

- Success of his requests completion

Tools

- MSP
- PDC
- Khibana [log analyzer]
- DevStudio

Main stakeholders

Developers

Builds customer applications

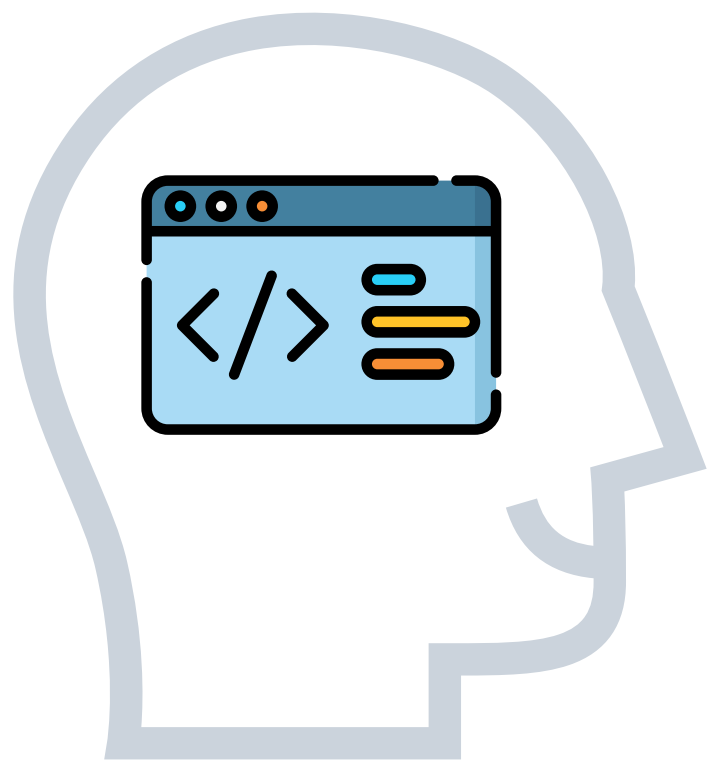**Any Team**
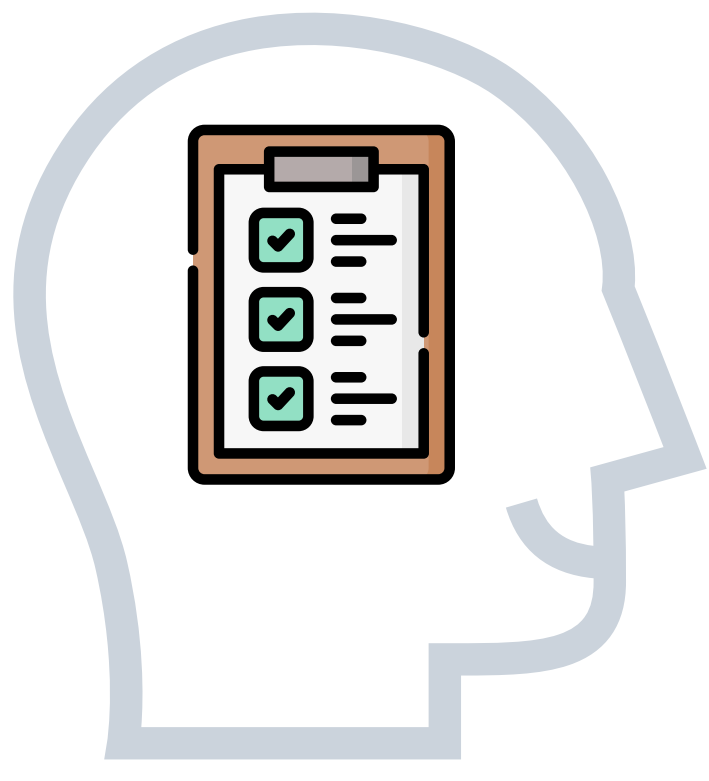
Works collaboratively to develop the applications

Product Manager

"Owner of the application"

Goals

- Ensure the business needs are delivered
- Owner of overall application
- Accountable, security, compliances, legal audit

Key drivers

- Business KPI

Tools

- DevStudio
- Application

Main stakeholders

Development Team
Builds apps using App Factory
Any Team
Works collaboratively to develop the applications

QA Specialist
Maintains the quality of the applications
Any Team
Collaborates on the quality aspects of developed application

Product Architect
Plans the product for scalability
Any Team
Works with him to plan the implementation approach
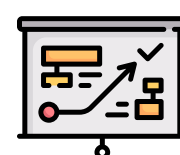
Scrum Master
Plans the development
Any Team
Works with scrum master for development plan

End Users
Users for the customer built application
Any Team
Collaborates with them to understand the user needs

QA Specialist

"Ensure the quality of the application is good"

Goals

- Test applications

Key drivers

- Quality of the applications

Tools

- DevStudio
- Third party test tools

Main stakeholders

Developers
Business customer applications
Any Team
Works collaboratively to develop the applications

Business Users
Understand the business needs
Any Team
Collaborates with them to understand the business needs

Release Admin

"Ensure the quality of the application is good"

Goals

- Deploy the application branches/release environments

Key drivers

- Effectiveness of running deployment pipeline

Tools

- DevStudio
- Deployment Manager

Main stakeholders

Developers
Business customer applications
Any Team
Works collaboratively to develop the applications
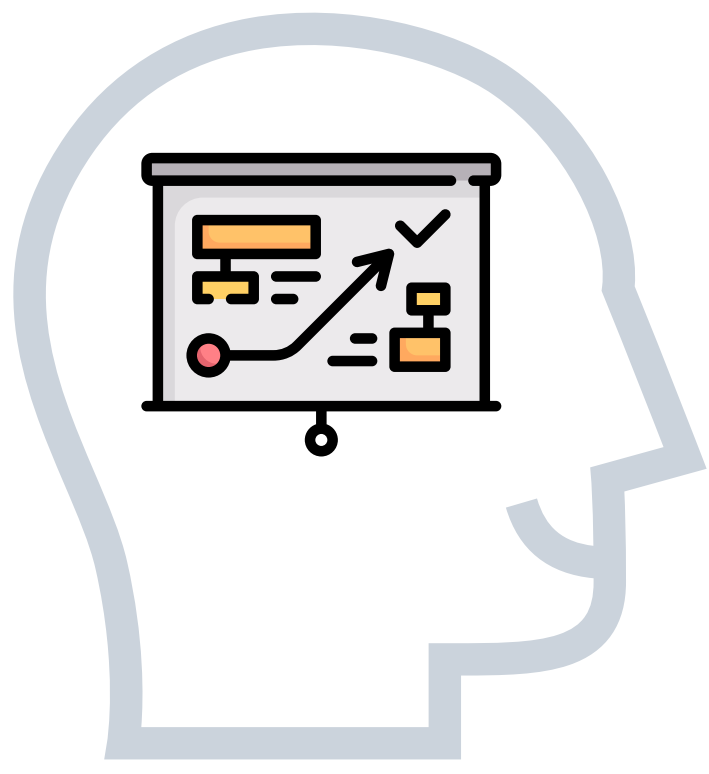
Scrum Master

"Fcailiate and align the team to meet deliverables in given time"

Goals

- Make sure the development progresses as per plan

Key drivers

- Effective completion of time based delivery

Tools

- Agilestudio
- Jira

Main stakeholders

Development Team
Builds apps using App Factory
Any Team

Mentor provides technical guidance to the citizen developer

QA Specialist
Maintains the quality of the applications
Any Team

Collaborates on the quality aspects of developed application

Product Architect
Plans the product for scalability
Any Team

Works with the tproduct architect to plan the implementation approach
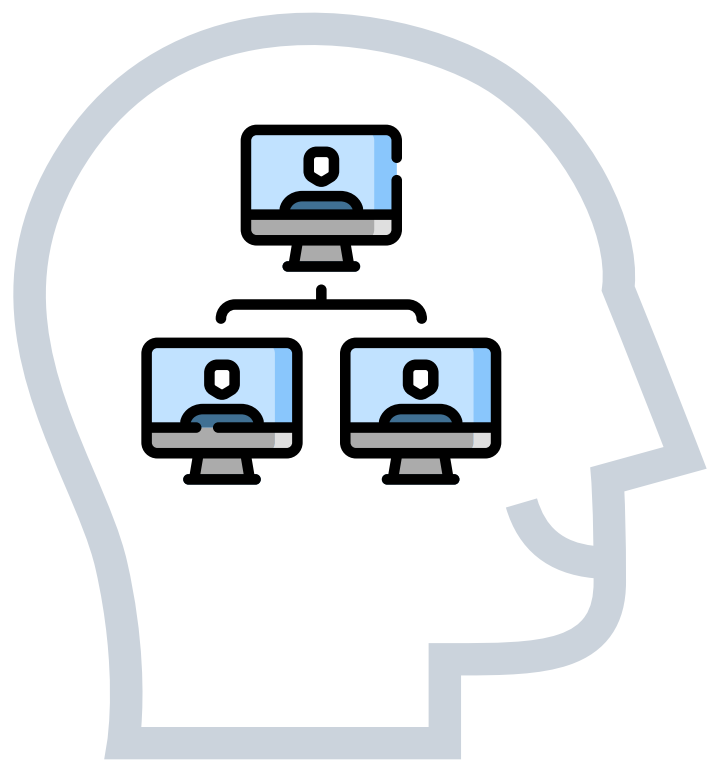
Care Management

Coordinator

"I assist clinical staff with administrative tasks so they can focus on patient/member support"

Goals

- Support care management activities by taking on tasks that can be taken on by non clinical person
- Administrative support tasks
- Communicating with staff to ensure SLAs are met
- Gathering information for requests

Key drivers

- Regulatory guidance for time frames (SLAs)
- Response time
- Post discharge engagement
- Success of patient engagement

Tools

- Pega Care Management
- Clinical information e.g. EHR
- Pega Questionaire
- Pega Customer Service
- Customer Decision Hub
- Phone / Fax
- Spreadsheet applications

Main stakeholders

CM Navigator
Collaborates to support patients
Pega Care Management

Coordinators work with navigators to ensure patients are supported throughout their journey

CM Nurse
Caring for and informing patients
Pega Care Management

Nurses work with coordinator to ensure their work is organized and efficient

Manager/Director
Ensuring department excellence
Pega Care Management

Managers/Directors coordinate staff in order to achieve organizational goals across departments
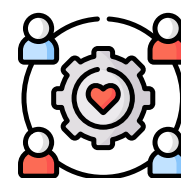
Supervisor
Oversees administrative work
Pega Care Management

Supervisors ensure that Coordinators have the resources needed to provide administrative support
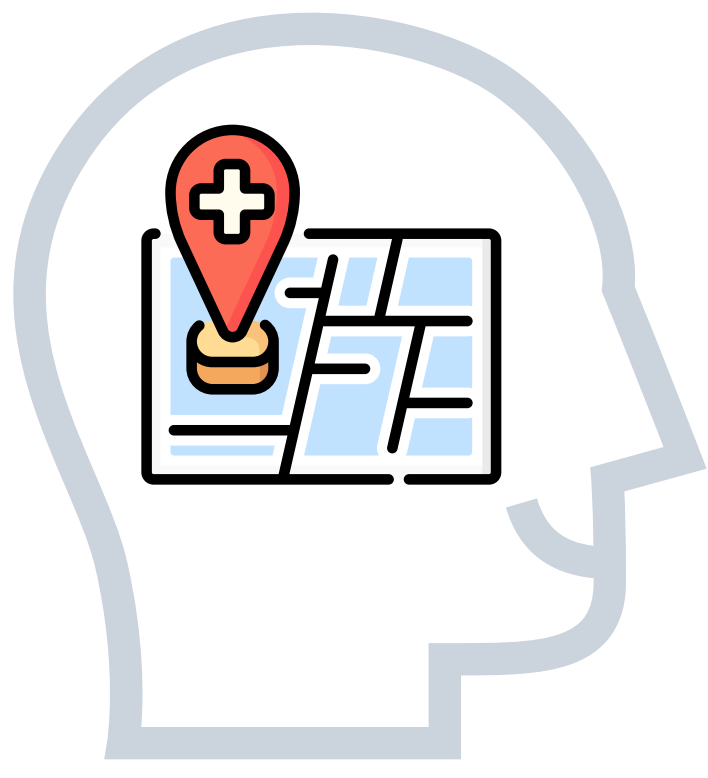
Care Management

CM Navigator

"I take great pride in making sure the patient feels comfortable and confident in their overall healthcare journey"

Goals

- Act as the first point of contact for patients navigating their healthcare journey
- Patient outreach
- Care team coordination
- Patient education

Key drivers

- Case load volume (Patient volume)
- Patient satisfaction
- Physician satisfaction
- SLA completion

Tools

- Pega Care Management
- Electronic Health Records (EHR)
- Pega Questionaire
- Pega Customer Service
- Customer Decision Hub
- Phone / Fax
- Spreadsheet applications

Main stakeholders
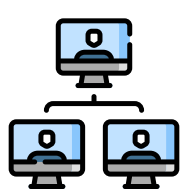
CM Coordinator
Collaborates to support patients
Pega Care Management

Navigators works with coordinator to ensure they have administrative resources needed to provide care

CM Nurse
Caring for and informing patients
Pega Care Management

Nurses work with Navigator to ensure their patients recieve the care and education they need

Manager/Director
Ensuring department excellence
Pega Care Management

Managers/Directors coordinate staff in order to achieve organizational goals across departments
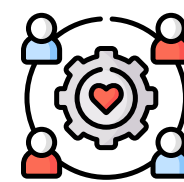
Supervisor
Oversees administrative work
Pega Care Management

Supervisors ensure that Navigators have the resources needed to provide patient support

Care Management

Nurse

"I make sure my patients can make progress towards becoming healthy and return to a good quality of life"

Goals

- Help patients improve health
- Guide patients to return to a good quality of life
- Discharge planning
- Barriers to care
- Establishing patient goals
- Determining interventions to achieve the goals
- Outreach to external care team members

Key drivers

- Patient recovery time and/or progress
- Case load volume (Patient volume)
- Engagement standards
- SLA completion

Tools

- Pega Care Management
- Clinical information e.g. EHR
- Pega Questionaire
- Pega Customer Service
- Customer Decision Hub
- Phone / Fax
- Spreadsheet applications

Main stakeholders
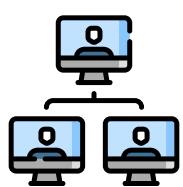
CM Coordinator
Collaborates to support patients
Pega Care Management

Nurses work with coordinators to ensure patients are supported throughout their journey

CM Navigator
Collaborates to support patients
Pega Care Management

Navigators work with nurses to ensure patients are supported throughout their journey

Manager/Director
Ensuring department excellence
Pega Care Management

Managers/Directors coordinate staff in order to achieve organizational goals across departments
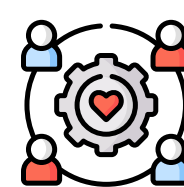
Supervisor
Oversees patient care
Pega Care Management

Supervisors ensure that nurses have the resources needed to provide patient support
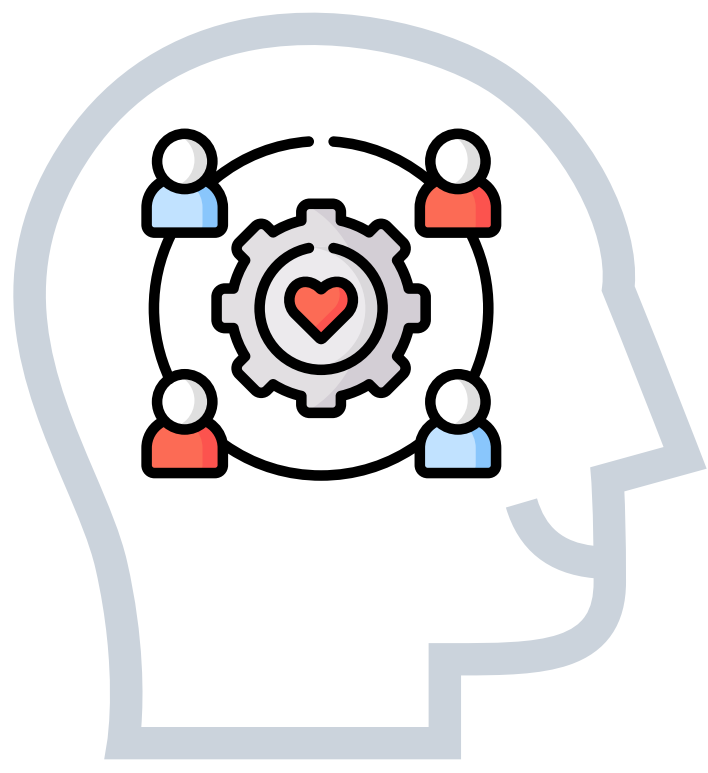
Care Management

Supervisor

"I am responsible for the day to day operations of the care management workforce in order to ensure the best service possible is provided"

Goals

- Ensure case managers have the resources needed to handle case loads
- Meeting organizational and departmental goals
- Overseeing staff case load
- Managing staff schedules and deadlines
- Escalation management and mitigation
- Complaint processing
- Designing NBA items

Key drivers

- KPI of ccase managers
- Clinical staff KPI
- Percent towards maximum case load
- SLA completion

Tools

- Pega Care Management
- Clinical information e.g. EHR
- Pega Questionaire
- Pega Customer Service
- Customer Decision Hub
- Phone / Fax
- Spreadsheet applications

Main stakeholders
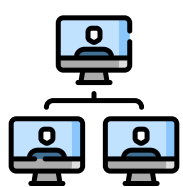
CM Coordinator
Collaborates to support patients
Pega Care Management

Supervisors work with coordinators to ensure all staffrecieve proper administrative support

CM Navigator
Collaborates to support patients
Pega Care Management

Navigators work with nurses to ensure patients are supported throughout their journey

Manager/Director
Ensuring department excellence
Pega Care Management

Supervisors report directly to managers/directors to make sure organizational objectives are being met
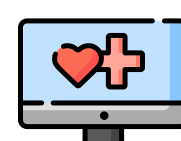
CM Nurse
Caring for and informing patients
Pega Care Management

Supervisors oversee nursing staff to guarantee patients recieve the best care

Utilization Management

Coordinator

"I make sure the health plan workers have all the resources and support required to complete their work effeciently"

Goals

- Support utilization management activities by taking on tasks that can be conducted by non clinical person
- Managing communications
- Assembling intake or clinical review requests
- Scheduling peer to peer evaluations
- Coordinating care activities
- Non-clinical administrative work

Key drivers

- SLA completion
- Communication efficiency
- Organizational objectives

Tools

- Pega Care Management
- Outlook
- Phone/Fax
- Spreadsheet applications
- Reporting tools
- Pega Customer Services (interaction portal)
- Work queues

Main stakeholders

UM Nurse
Performing clinical reviews and processing requests
Pega Care Management

Nurses work with coordinator to ensure their work is organized and efficiency

UM Supervisor
Oversees administrative work
Pega Care Management

Supervisors ensure that Coordinators have the resources needed to provide administrative support

Manager/Director
Ensuring departmental excellence
Pega Care Management

Managers/Directors coordinate staff in order to achieve organizational goals across departments

Nurse

"I am the first line of clinical review for medical necessity determinations to help patients reach the care and services they need to heal"

Goals

- Reviewing for medical necessity in order to determine qualification for access to certain benefits e.g. visits, procedures, and/or medications
- Adhering to medical necessity guidlines
- Process requests for services
- Process clinical reviews
- Conduct initial reviews
- Maintain ongoing reviews

Key drivers

- SLA completion
- Number of requests completed
- Number of appeals

Tools

- Pega apps
- Integrated Clinical Guideline Review
- Payer portals
- Outlook
- Clinical information e.g. EHR

Main stakeholders

CM Coordinator

Collaborates to support patients

Pega Care Management

Nurses work with coordinators to ensure patients are supported throughout their journey

UM Supervisor

Oversees patient care

Pega Care Management

Supervisors ensure that nurses have the resources needed to provide patient support

Manager/Director

Ensuring departmental excellence

Pega Care Management

Managers/Directors coordinate staff in order to achieve organizational goals across departments

Utilization Management

Supervisor

"I am responsible for the day to day operations of the medical management workforce to make sure we provide consistent and punctual work that adheres to healthcare standards"

Goals

- Ensure utilization management nurses have the resources needed to handle case loads
- Meeting organizational and department goals
- Overseeing staff case load
- Managing staff schedules and deadlines
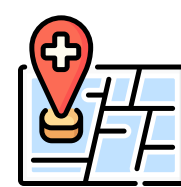- Escalation management and mitigation
- Complaint processing
- Designing NBA items

Key drivers

- KPI of medical management
- Clinical staff KPI
- Percent towards maximum case load
- SLA Completion

Tools

- Pega Care Management
- Clinical information e.g. EHR
- Pega Customer Service
- Customer Decision Hub
- Phone/Fax
- Spreadsheet applications

Main stakeholders

UM Coordinator
Collaborates to support patients
Pega Care Management

Supervisors work with coordinators to ensure all staff recieve proper administrative support

UM Nurse
Performing clinical reviews and processing requests
Pega Care Management

Supervisors oversee nursing staff to guarantee patients/ members recieve the best care

Manager/Director
Ensuring departmental excellence
Pega Care Management

Supervisors report directly to managers/directors to make sure organizational objectives are being met

Care Management + Utilization Management

Manager/Director

"I ensure that my staff of clinical and administrative workers have the resources they need to adhere to regulations and meet our organizational objectives"

Goals

- Departmental and organizational excellence
- Interdepartmental communication and transparency
- Reporting to organization executives
- Overseeing staff case load
- Managing staff deadlines
- Escalation management and mitigation
- Designing NBA items

Key drivers

- KPI of administrative staff
- Clinical staff KPI
- Percent towards maximum case load
- SLA completion

Tools

- Pega Care Management
- Clinical information e.g. EHR
- Pega Questionaire
- Pega Customer Service
- Customer Decision Hub
- Phone / Fax
- Spreadsheet applications

Main stakeholders

CM Navigator
Collaborates to support patients
Pega Care Management
Managers/Directors oversee navigators and manage case load to ensure patients recieve needed care

CM Nurse
Caring for and informing patients
Pega Care Management
Managers/Directors oversee nursing staff performance and resource delegation
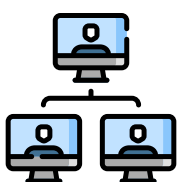
CM Coordinator
Collaborates to support patients
Pega Care Management
Managers/Directors work with coordinators to ensure all staff recieve proper administrative support
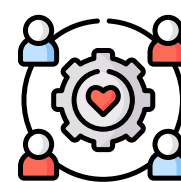
Supervisor
Oversees administrative work
Pega Care Management
Managers/Directors work with supervisors to make sure their staff have proper resources to complete and manage case load

Business Analyst

"I want to analyze business goals in order to bring applications to market in a timely fashion for customers."

Goals

- Understand business process diagrams, policies, and procedures
- Translate business requirements into a low code environment
- Conduct operational walk-throughs

Key drivers

- Turnaround time to build applications
- Ability to grasp business domain
- Level of proficiency in understanding PGP competence
- Process improvement
- Level of end user proficiency

Tools

- Storyboards
- Visio
- Pega app studio
- Video-recording software
- Microsoft Office software

Main stakeholders

Business Operational Manager
Understand and process business domains and goals
Pega Government Platform

The business analyst works closely with the business operational manager to successfully bring applications to market.

Pega Government Platform

Case Worker

"I want to diligently review each case and its nuances in order to determine the best next action for the case."

Goals

- Prioritize cases
- Review the details of a case
- Determine the next steps needed to process a case
- Perform assessments

Key drivers

- SLA/turnaround time
- Number of cases completed in a given timeline
- Customer satisfaction survey
- Minimal back-and-forth communication with customer

Tools

- Case management solution
- External systems (benefits systems, repository of citizen database, tax record systems)
- Government policy books
- Correspondence systems

Main stakeholders

Constituent
Request services or information
Pega Government Platform

The constituent works closely with the assigned case worker on their particular case.

Supervisor
Manage team workload and case escalation
Pega Government Platform

The supervisor works with a case worker to manage their workload and evaluate their performance.

Pega Government Platform

Constituent

"I want to request services or information in a timely fashion with full transparency throughout the process."

Goals

- Request services or information from the government
- Utilize a self-service portal to make requests
- Make a payment
- Receive acknowledgements

Key drivers

- Service indicator
- Customer satisfaction survey

Tools

- Web-based applications via smartphone, tablet, or computer
- Paper application
- Digital signatures

Main stakeholders

Intake Officer
Capture information and initiate a case
Pega Government Platform

The intake officer interacts directly with the constituent to gather information for a case.

Pega Government Platform

Intake Officer

"I want to effectively capture information from constituents in order to properly initiate a case."

Goals

- Capture information provided by constituents
- Retrieve documents
- Collect application information
- Scan and enter information into the system
- Initiate a case
- Call constituents or vendors

Key drivers

- SLA/turnaround time
- Reduction of data errors
- Turnaround time for applications

Tools

- Information capture system
- Scanners
- Telephones
- Paper application forms

Main stakeholders

Constituent
Request services or information
Pega Government Platform

The constituent interacts directly with the intake officer to deliver information for a case.

Supervisor
Manage team workload and case escalation
Pega Government Platform

The supervisor works with the intake officer to best understand a case and determine next steps.

Case Worker
Review case details and determine the best next action
Pega Govenment Platform

The case worker works with the intake officer to best understand a case and determine next steps.

Investigator

"I want to understand and analyze the complexity of a case in order to determine the best solution."

Goals

- Analyze and identify the complexity of a case
- Determine the next steps neededfor the best solution
- Identify subjects for a case
- Conduct interviews with witnesses
- Perform assessments
- Interact with external agencies

Key drivers

- Due diligence
- SLA/turnaround time
- Number of cases completed in a given timeline

Tools

- Case management solution
- Background check systems
- Verification services
- Citizen records
- Mobile devices
- Paper forms/lists

Main stakeholders

Constituent
Request services or information
Pega Govenment Platform

The constituent works closely with the assigned investigator on their particular case.
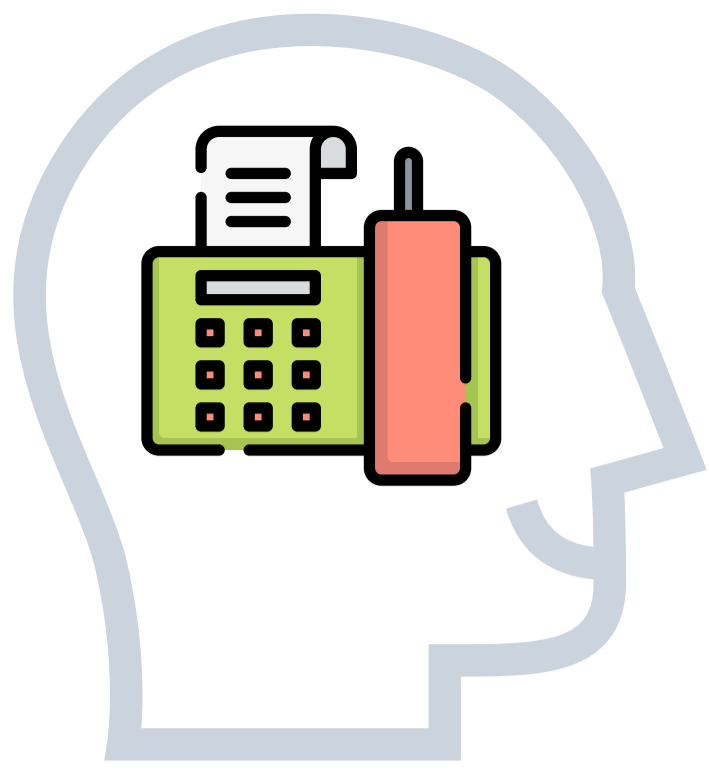
Intake Officer
Capture information and initiate the case
Pega Government Platform

The intake officer interacts with the investigator to convey the details of a case.

Supervisor
Manage team workload and case escalation
Pega Government Platform

The supervisor works with the investigator to best understand a case and determine next steps.

Case Worker
Review case details and determine the best next action
Pega Government Platform

The case worker works with the investigator to best understand a case and determine next steps.

Pega Government Platform

Supervisor

"I want to effectively manage team performance and case escalation in order to move cases forward in the process."

Goals

- Review the details of a case
- Determine the next steps needed to process the case
- Act as the point of escalation on a case
- Manage case workers' workload
- Monitor case workers' performance
- Work with policy makers and business architects

Key Drivers

- Minimal points of escalation
- SLA/turnaround time
- Number of cases completed in a given timeline
- Customer satisfaction survey
- Employee satisfaction survey

Tools

- Case management solution
- External systems (benefits systems, repository of citizen database, tax record systems)
- Government policy books
- Correspondence systems

Main stakeholders

Constituent
Request services or information
Pega Government Platform

The constituent works closely with the assigned supervisor on an escalated case.

Case Worker
Review case details and determine the best next action
Pega Government Platform

The case worker reports to the supervisor for their workload management and performance evaluation.

CSR

"I make customers happy by servicing their financial needs with care"

Goals

- Provide good customer service to a satisfactory level in an appropriate amount of time
- Interact with customers over various channels
- Assist customers with their questions, concerns, and problems

Key drivers

- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Customer experience (CSAT + NPS)
- Conversion and offer rates
- Occupancy rate

Tools

- Pega Customer Service
- Company websites + directories
- 3rd Party utilities (sales software, loan systems, mortgage systems, etc.)
- Knowledge management
- Web search
- Workforce management + collaboration tools

Main stakeholders

CSR Manager

Help to guide and manage CSRs

Pega Customer Service

The CSR reports directly to the CSR Manager in order to maintain the quality of customer support

CSR - Back Office Specialist

Assisting CSRs with complex tasks

Pega Customer Service

The CSR consults with and transfers work to the Back Office Specialist

CSR - Back Office Specialist

"I complete difficult and highly specialized tasks for our customers with a high level of quality and efficiency"

Goals

- Addressing a narrow set of functionalities very effectively
- To complete various, specific and specialized tasks with excellence and efficiency
- Responding to customer requests that don't require interacting with customers

Key drivers

- Task specific KPIs
- Number of cases completed
- Error rate within resolutions

Tools

- Pega Customer Service
- Background check systems
- Workforce management + collaboration tools

Main stakeholders

CSR Manager
Help to guide and manage CSRs
Pega Customer Service

The CSR Back Office Specialist reports directly to the CSR Manager in order to maintain quality of back office tasks

CSR
Transfers specialized case work to back office
Pega Customer Service

The CSR transfers complex cases to the Back Office Specialist with complex work

CSR Manager

"I coach CSRs to provide great customer experience, mitigate customer escalations, and recruit for financial services support staff"

Goals

- Making sure their agents perform optimally and adhere to all bank policies
- Coaching various customer service representative employee types
- Monitoring metrics, aggregate level data
- Updating different teams based on required educational materials, policy updates, etc.

Key drivers

- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Customer experience (CSAT + NPS)
- Conversion and offer rates
- Turnover rate

Tools

- Pega Customer Service
- Telephony tools
- Coaching tools
- Reporting tools
- Workforce management + collaboration tools

Main stakeholders

CSR
Provide great customer service

Pega Customer Service

The CSR reports directly to the CSR Manager in order to maintain the quality of customer support

CSR - Back Office Specialist
Assisting CSRs with complex tasks

Pega Customer Service

The CSR consults with and transfers work to the Back Office Specialist

Product Team Members
Improve the quality of product

Internal tools

Provides resource to train CSRs on new products and policies

Communications - Customer Service

CSR

"I help customers take care of their service issues so they know our company cares"

Goals

- Responding to customer requests for service over multiple channels
- Address a customer's service issue quickly and efficiently
- Responding to phone calls and/or chat messages
- Up-sell and cross-sell products to customers
- Understanding a customers background with products and services

Key drivers

- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Customer experience (CSAT + NPS)
- Conversion and offer rates
- Retention rate

Tools

- Pega Customer Service
- Telephony tools
- Knowledge Management
- Troubleshooting tools
- Web search
- Legacy systems
- Workforce management + collaboration tools

Main stakeholders

CSR Manager
Help to guide and manage CSRs
Pega Customer Service
The CSR reports directly to the CSR Manager

CSR Peers
Offer peer to peer advice and guidance
Pega Customer Service
The CSR works alongside peers in order to improve workflows and educate on best practices

Design.Pega.com

CSR - Retention Specialist

"I help retain customers that are at a higher risk for cancelling service"

Goals

- Address a customer's service issue quickly and efficiently
- Offer relevant/necessary information to members
- Responding to phone calls and/or chat messages
- More focus on quality of service than time to resolve a customer issue

Key drivers

- Retention rate
- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Conversion and offer rates
- Customer experience (CSAT + NPS)

Tools

- Pega Customer Service
- Telephony tools
- Knowledge Management
- Troubleshooting tools
- Web search
- Workforce management + collaboration tools
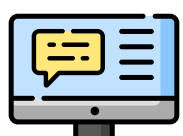
Main stakeholders

CSR Manager
Help to guide and manage CSRs
Pega Customer Service

The CSR reports directly to the CSR Manager

CSR
Offer peer to peer advice and guidance
Pega Customer Service

The CSR works tangentially with retention specialists, giving insight that can aid in keeping customers satisfied

CSR Manager

"I coach CSRs to provide great customer experience, mitigate customer escalations, and recruit for comms support staff"

Goals

- Improve team aggregate metrics and service quality
- Improve call center performance metrics based on business goals
- Coaching various customer service representative employee types
- Monitor supply and demand of resources within contact centers

Key drivers

- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Customer experience (CSAT + NPS)
- Conversion and offer rates
- Retention rate
- Turnover rate

Tools

- Pega Customer Service
- Telephony tools
- Reporting tools
- Coaching tools
- Legacy systems
- Workforce management + collaboration tools

Main stakeholders

CSR
Provide great customer service
Pega Customer Service

The CSR reports directly to the CSR Manager in order to maintain the quality of customer support

CSR Specialist
Conduct specialized service tasks
Pega Customer Service

The CSR specialist reports directly to the CSR Manager in order to maintain the quality of customer support in retention cases

Healthcare - Customer Service
CSR

"I help members in need of help to ensure they are recieving the best care possible"

Goals

- Responding to member, patient, and provider requests for service over multiple channels
- Provide high quality customer service based on member service needs/questions.
- Offer relevant/necessary information to members
- Ensuring members and patients understand how to address their care needs
- Ensuring providers understand how to deliver care aligned with their patients' plans

Key drivers

- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Customer experience (CSAT + NPS)
- Conversion and offer rates

Tools

- Pega Customer Service
- Company websites + directories
- Partners' service tools e.g. Pharmacy Benefit Managers (PBMs)
- Telephony tools
- Web search
- Adhoc apps and web directories
- Workforce management + collaboration tools

Main stakeholders

CSR Manager
Help to guide and manage CSRs

Pega Customer Service

The CSR reports directly to the CSR Manager

Healthcare - Customer Service

CSR Manager

"I coach CSRs to provide great customer experience, mitigate customer escalations, and recruit for healthcare support staff"

Goals

- Improve team aggregate metrics and quality of care
- Offer relevant/necessary information to members
- Improve call center performance metrics based on business goals
- Coaching various customer service representative employee types
- Updating different teams based on required educational materials, policy updates, etc.

Key drivers

- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Customer experience (CSAT + NPS)
- Conversion and offer rates
- Turnover rate

Tools

- Pega Customer Service
- Telephony Tools
- Pharmacy Benefit Managers (PBMs)
- Coaching tools
- Reporting tools
- Workforce management + collaboration tools

Main stakeholders

CSR
Provide great customer service
Pega Customer Service
The CSR reports directly to the CSR Manager

Insurance - Customer Service

CSR

"I'm here to delight my customers and provide them with the information they are in need of"

Goals

- Assist customers with their problems, issues, and/or question
- Serve customers in a way that leaves customers satisfied
- Responding to customer requests for service over multiple channels
- Provide service based on priority level

Key drivers

- Average Handle Time (AHT)
- First Call Resolution (FCR)
- Customer experience (CSAT + NPS)
- Length of open cases

Tools

- Pega Customer Service
- Knowledge Management
- Telephony tools
- Company websites + directories
- 3rd Party utilities
- Web search
- Workforce management + collaboration tools

Main stakeholders

CSR Manager
Help to guide and manage CSRs
Pega Customer Service
The CSR reports directly to the CSR Manager in order to maintain the quality of customer support

CSR Specialist
Offer peer to peer advice and guidance
Pega Customer Service
The CSR works with CSR specialist workers in order to ensure customers recieve the appropriate support

CSR - Claims Specialist

"I make customers happy by approving claims within a day so customers receive their payment as soon as possible"

Goals

- Ensure claims contain all the needed information
- Ensure information is complete and provide a timely decision to approve/reject the claim
- Serve customers in a way that leaves customers satisfied
- Review and approve/reject claims

Key drivers

- Service Level Agreements (SLA)
- Average Handle Time (AHT)
- Length of open cases

Tools

- Pega Customer Service
- Knowledge Management
- Telephony tools
- Company websites + directories
- 3rd Party utilities
- Workforce management + collaboration tools

Main stakeholders

CSR Manager
Help to guide and manage CSRs
Pega Customer Service

The CSR claims specialist reports directly to the CSR Manager in order to maintain the quality of customer support

CSR
Offer clarification on claims
Pega Customer Service

The Claims Specialist sometimes collaborates with other CSR workers to better understand customer support needs

CSR Manager

"I coach CSRs to provide great customer experience, mitigate customer escalations, and recruit for insurance support staff"

Goals

- Improve call center performance metrics based on business goals
- Monitor supply and demand of resources within contact centers
- Coaching various customer service representative employee types
- Updating different teams based on required educational materials, policy updates, etc.

Key drivers

- Average Handle Time (AHT)
- First Call Resolution (FCR)
- Customer experience (CSAT + NPS)
- Length of open cases
- Turnover rate

Tools

- Pega Customer Service
- Telephony Tools
- Company websites + directories
- Coaching tools
- Reporting tools
- Placeholder...
- Workforce management + collaboration tools

Main stakeholders

CSR
Provide great customer service
Pega Customer Service
The CSR reports directly to the CSR Manager in order to maintain the quality of customer support
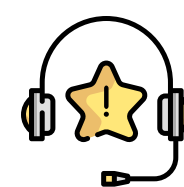
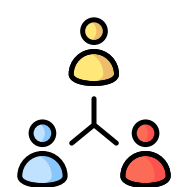**CSR Claims Specialist**
Conduct specialized service tasks
Pega Customer Service
The CSR specialist reports directly to the CSR Manager in order to maintain the quality of customer support and address claims support needs
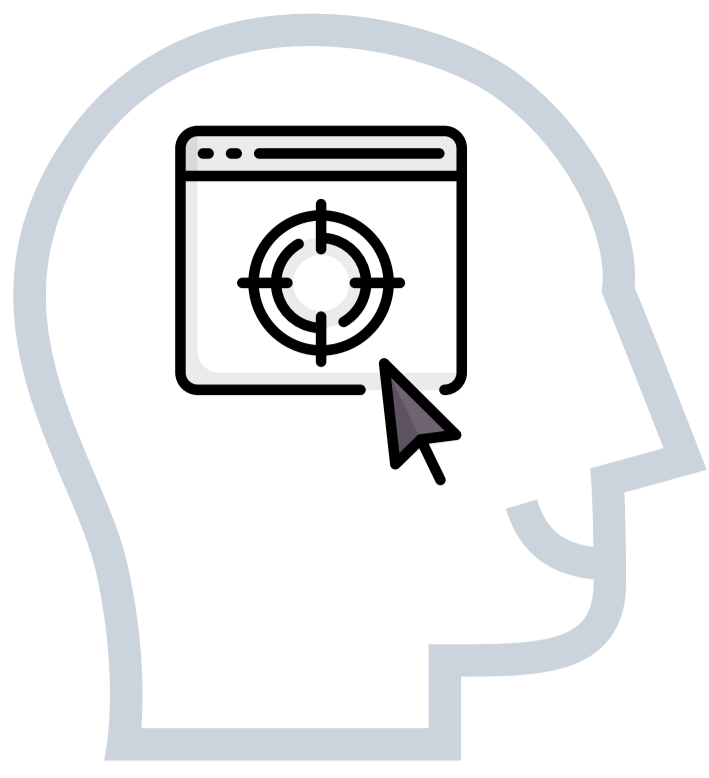
Product Team Members
Improve the quality of product
Internal tools
Provides resource to train CSRs on new products or policies

Business Architect

"I want to help clients prioritize what to build, so maximum value can be achieved"

Goals

- Get definition and scope agreement from clients by using low-code tools, data models, and case lifecycle
- Prepare DCO sessions to document requirement

Key drivers

- Amount of user stories
- Definition of ready; what is agreed to be built
- Definition of done; progress of what is being built

Tools

- App Studio (Case type designer, Data types, UI templates, Application Settings)
- Dev Studio (PegaUnit, Scenario Testing, Branch Quality)
- Agile Studio
- Whiteboard
- Microsoft Vizio

Main stakeholders

Lead system architect
Lead the development
App studio, Dev Studio

Discusses acceptance criteria, validates user story

Executive
Provide strong support and governance

Collaborates with executives to agree on scope

QA
Check application quality
App Studio

Ensure intended business outcome is met

Product Owner (Client)
Owns desired outcome

Collaborate to agree on scope, manage product backlog

Sales Engineer

"I want to create a quality demo to convince the client that Pega is the solution to their business goals."

Goals

- Deliver a visually appealing demo for the client that demonstrates proposed solution
- eate proof of concepts with customer data to demonstrate solution with actual client data
- ollow development guidelines and best practices
- Reduce complexity of new developments, as much as possible

Key drivers

- Feedback from Solution Consultant, Account Executive, and Clien

Tools

- App Studio (Case type designer, Data types, UI templates, Application Settings)
- Dev Studio (Activities, Connect wizards)

Main stakeholders

Solution consultant
Educate client about product capabilities
App studio, Dev studio
Collaborate on building client demo

Front-end UI team
Lend UI expertise
Dev studio
Refine UI implementation in demos

Demo execellence team
Produce demo assets
App Studio, Dev Studio
Build basic demos as starting points for solutions

Solution Consultant

"I want to support account executives by educating customers about product capabilities and value."

Goals

- Discover business requirements and translate them into solutions and relevant Pega demos
- Get customer to understand value of Pega
- Advance sale to the next stage

Key drivers

- Vendor of choice
- Number and success of deals

Tools

- Pega platform
- Powerpoint
- PIXAR
- Sales Automation

Main stakeholders

Account executive
CLose the deal
Sales Automation
Guide client through sales cycle

Client champion
Understand value of Pega

Relay value to key decision makers
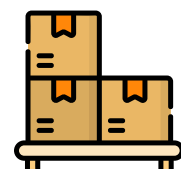
Demo excellence team
Produce demo assets
App Studio, Dev Studio
Build basic demos as starting points for solutions

Sales engineer
Demostrate client solution
Agile Studio
Create customized demos based on client needs

App Factory

Admin

"I want to ensure the good health of App Factory system and make it available for citizen developers to use."

Goals

- Upkeep of system health
- Ensure apps are healthy and performant
- Identify citizen developers to adopt platform features and report issues
- Consuming nightly platform upgrades to help get new platform features adopted and tested
- Work with engineering to log issues in adoption

Key drivers

- Testimonials on whether system is accessible and performant
- Ensuring system downtime is nearly zero
- Time spent by users on App studio vs Dev studio

Tools

- Admin Studio - To track memory consumed by requestors, agents and nodes
- Deployment Manager - To track user actions e.g. time spent on Dev Studio vs. App Studio
- Could monitoring AWS tools - To monitor user activities in environments
- Tools used by Cloud Operations Team - To check logs and log sizes

Main stakeholders

Citizen Developer
Builds apps using App Factory
Any Team

Admin ensures uninterrupted access to App Factory service for citizen developers

Cloud Engineer
Develops tools to provision Pega Platform on the cloud
Pega Cloud

Assists Admin with installation of infra upgrades

Product Leader
Reviews product goals
App Factory

Admin ensures uninterrupted access to App Factory service for citizen developers

App Factory

Citizen Developer

"I want to create an app from data model to the UX so that users can use the app to get tasks done efficiently"

Goals

- Coordinating with App Factory team to submit app idea, requesting it's approval and a dedicated space for it
- Set up the data model, case design and UI and push the app through staging, development and production environments while following the due process set out by App Factory.
- Talking to users to understand their goals and issues faced in using the app
- Coordinating with App Factory team to decommission apps that are not being used anymore

Key drivers

- Testimonials from users on whether they are able to get their tasks done efficiently
- Bugs reported in the app should decrease with time
- Active users and average session time per user. (Admin & mentors provide this information)

Tools

- App Studio - To carry out initial development activities.
- Dev Studio - To carry out advanced development activities such as data model manipulation
- App Factory - Interact with end users using pulse and spaces on App Factory
- Offce 365 - For documentation and development support

Main stakeholders

App Factory Mentor
Coaches Citizen Developers
App Factory

Citizen developer seeks technical guidance while developing the app

App Factory Admin
Ensures uninterrupted access to App Factory
App Factory

Assists Citizen Developer in resolving build failures

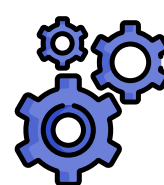**Manager**
Manages the Citizen Developer
Any Team

Citizen Developer provides status updates to manager and aligns on backlog

App Factory

Mentor

"I want to guide citizen developers in the best practices of App Studio and Pega so that they can become effective and independent as application developers"

Goals

- Review application development requests
- Mentor citizen developers with respect to application development
- Advocate the use of App studio as the default choice for citizen developers
- Run the App Factory program internally so we can iron out issues and ensure seamless adoption by users
- Help citizen developers resolve integrations and platform issues and provide deployment guidance

Key drivers

- Whether the citizen developer came with an idea and was able to develop the app using App Factory.
- Whether citizen developers are satisfied with App Factory and release apps frequently to add new features
- Whether the citizen developer become more capable and independent post coaching.
- App usage - Daily active users, average session time, daily case volume

Tools

- App Studio - Using app studio is promoted as it is simpler than Dev Studio and reduces bugs
- Dev Studio - Use it for mentoring on advanced use-cases that can't be done on App Studio
- App Factory - Mentors encourage developers to use pulse & spaces in App Factory to interact with their users
- Webex Teams - Post notifications for system updates

Main stakeholders

Citizen Developer
Builds apps using App Factory
Any Team

Mentor provides technical guidance to the Citizen Developer

Pega Employees
Use the apps to automate tasks
Any Team

Mentor ensures quality apps are delivered

App Studio Product Owner
Owns product vision
App Studio

Mentor provides feedback on experiences that citizen developers find difficult to use

App Studio Engineering Manager
Manages Feature Development
App Studio

Mentor reports bugs identified by citizen developers using App Studio for development

Cloud Engineer

"I want to provide a seamless experience to cloud clients and interact with internal teams to resolve issues"

Goals

- Handle provisioning and upgrade related issues from clients through Global Client Support (GCS) Portal
- Provision new environments and upgrade version of environments so clients can use the latest Pega version
- Route feedback from clients on automation or improvements in GCS portal to Product & Development teams
- Interact with cloud and platform engineering to fix known issues
- Work on strategic initiatives to automate cloud environment delivery and up-gradation to latest Pega version

Key drivers

- Ticket resolution time & engineering hours saved by using automation scripts
- Automation sucess & failure rate
- Bugs reported by clients after environment delivery
- Number of service requests (SR) reopened by client

Tools

- Global Client Support (GCS) Portal - Interact with clients on SRs raised by them
- Global Operations Console (GOC) Portal - Automation tool for client support. e.g. infra and platform upgrades
- Pega Diagnostic Cloud (PDC) Tool - Helps give clients access to self service functions
- Contract Portal - To verify whether provisioned assets match what was agreed upon in the cloud contracts
- App & Dev Studio - Used during platform upgrades to monitor provisioning services

Main stakeholders

Client
Use Pega Products

Any Company

Cloud engineer resolves client queries

Product Owner
Owns product vision

Cloud Engineering/Global Operations Console

Cloud engineer routes feedback from clients to influence feature prioritization

Engineering Manager
Manages feature development

Cloud Engineering

Cloud engineer raises bugs to improve the quality of tooling provided by the engineering team

Technical Account Manager
Supports clients with issue resolution

Global Service Assurance

Cloud engineer coordinates with them to provide onsite support & maintain relationship with clients

Client Support - Global Client Support (GCS)

Support Engineer

"I want to provide a good experience to clients ensuring that they succeed in their business using Pega"

Goals

- Creates service requests (SR) to resolve client queries by identifying the level of support required
- Creates sustaining engineering (SE) items for complex issues which need support from engineering teams
- Works with Service Assurance teams to provide on-site support and maintain the relationship with the client
- Forwards feedback from clients to product & engineering teams enabling product improvement
- Works on strategic initiatives to minimise recurring issues and promote a self service model for clients

Key drivers

- Average resolution time & Average time taken to create SE items
- Number of internal escalations i.e. SRs routed to wrong queue
- WFI count - SRs open due to no response from client or engineering
- Number of SRs resolved & Number of SRs reopened by client
- Percentage of SRs resolved without creating SE items

Tools

- App & Dev Studio - To replicate issues and work on API's
- Global Client Support (GCS) Portal - To update service requests and analyse reports.
- Global Operations Console (GOC) Portal - To perform basic troubleshooting tasks in client's environment
- Agile Studio - To communicate with product and engineering teams on SE items & client feedback

Main stakeholders
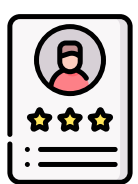
Client
Use Pega Products
Any Company

Support engineer resolves client queries

Product Owner
Owns product vision
Any Team

Support engineer routes feedback from clients to influence feature prioritization

Engineering Manager
Manages feature development
Any Team

Support engineer follows up with them to get SE items prioritized

Technical Account Manager
Supports clients with issue resolution
Any Team

Suuport engineer coordinates with them to provide onsite support & maintain relationship with clients

Cloud Engineer

"I want to develop applicatios that can scale seamlessly and handle multiple requests while provisioning the Pega platform"

Goals

- Develop cloud tooling to help Service reliability team (SRT) provision & update Pega services on any cloud
- Maintaining the Global Operations Console (GOC) portal
- Plan for epics by checking technical feasibility, integrations needed, dependancies, UX artefacts.
- Supporting SRT Team to resolve maintenance issues
- Addressing sustaining engineering (SE) items received from Global Client Support (GCS) Team.

Key drivers

- Code reusability
- Quality of code written (checked via Code reviews)
- Cost Optimisation by reducing time of build

Tools

- Agile studio - To update sprint related items and access documents on spaces.
- Dev Studio - Used to check if platform upgrades to an expected build
- Admin Studio - To monitor queue processors and to carry out debugs
- Deployment manager - To check if a feature works as expected upon update
- Jenkins - Build tool
- Intelli J - Code Editor
- Docker - To create and deliver installation image and containers to run code

Main stakeholders
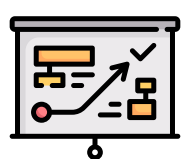
Scrum Master
Monitors spring delivery
Cloud Engineering
Cloud engineer provides the Scrum Master daily updates and discusses blocker

Product Owner
Owns product vision
Cloud Engineering
Cloud engineer reaches out for clarification on app behaviour

Engineering Manager
Manages feature development
Platform Engineering Teams
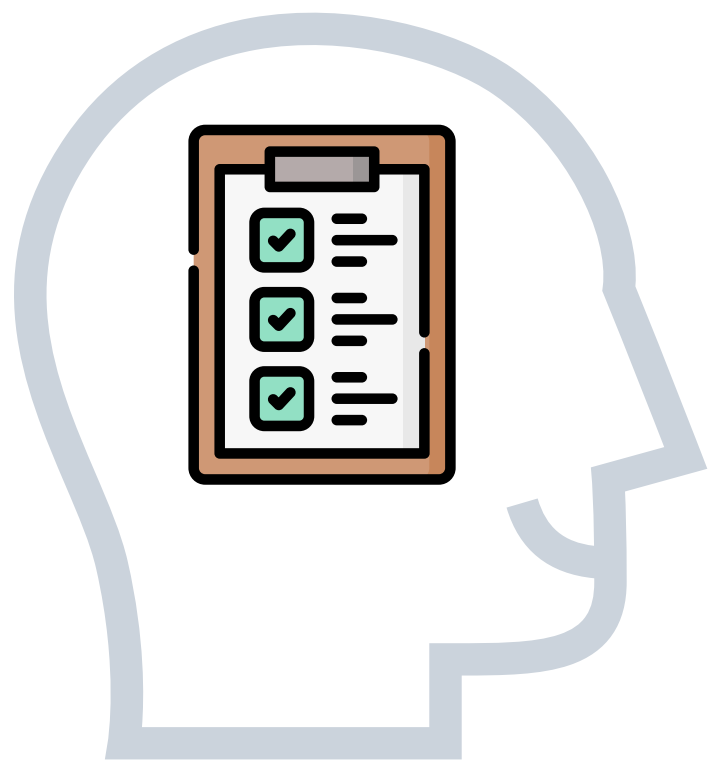Cloud engineer coordinates with engineering manager to clear inderdependencies and report platform bugs

SRT Cloud Engineer
Provisions cloud environments
Service Reliability Team
Cloud engineer coordinates with them to take feedback on the tooling and provide support on client issues

Product Owner

"I want to understand the pain points of clients, app teams and partners, translate them to product requirements and deliver features that solve these business problems"

Goals

- Analyse feedback from pre-sales, forums & tickets on Global Client Support (GCS) to translate as requirements
- Define release roadmap based on the top problems to be solved in a release by defining Epics, Goals and User stories. Groom the backlog and monitor delivery
- Plan for upcoming releases by analysing competitor apps, blogs and analyst reports.
- Improving quality by working with QA to resolve bugs and achieving maximum automation for features.
- Analysing feedback from internal clients who serve as adoption partners and translate it into requirements
- To have documentation on the greatest and latest features updated on Pega community

Key drivers

- Number of bugs
- Release related timeline and delays
- Internal Adoption Rate - Feedback from internal teams indicates interest
- External Adoption - Clients interest in existing features and ask for new features

Tools

- Agile Studio - Backlog and bugs management
- GCS Portal - For viewing client requests and feedback
- App & Dev Studio - For validating features developed
- Office 365 - For documentation

Main stakeholders
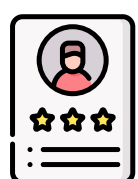
Client
Use Pega Products

Any Company

Product Owner interacts with clients to discuss product offerings

Tribe/Alliance Leader
Owns a major product area

Any Team

Product Owner interacts with Trive/Alliance Leader to provide updates and discuss blockers

Consuming Team Product Owner
Owns Product vision

Any Team

Product Owner showcases platform features and takes early feedback to modify product offering

Account Executive
Responsible for product sales

Sales

Product Owner coordinates with them to understand client needs and take feedback from client demos

QA Engineer

"I want to adhere to QA processes & deliver product of the highest quality with a good automation pipeline so that regressions are not introduced in case of changes"

Goals

- Prepares epic level test plans, write test cases, executes test cases when code is delivered and reports bugs
- Define release roadmap based on the top problems to be solved in a release by defining Epics, Goals and User stories. Groom the backlog and monitor delivery
- Writes automation test cases and analyses daily automation failures
- Performs testing on platform milestone builds
- Performs established QA practices - checks code coverages and carries out code reviews for UI tests
- Provide sprint demos to Alliance and Tribe Leaders

Key drivers

- Number of high priority bugs per release
- Automation coverage percentage
- Code review

Tools

- Agile Studio - To reports bug in each release, test case design and execution
- Selenium - Used for automation
- Ruby mine - For writing UI tests and checking automation coverage
- AUT Framework - Unit testing framework, available in Dev Studio
- Pega Units - Used for Scenario testing
- Bitbucket/GIT - For maintaining automation scripts
- AWS Tools - For deploying builds in cloud servers

Main stakeholders

Product & Engineering Leaders
Owns product vision & delivery
Any Team

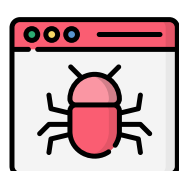QA Engineer presents features developed through sprint demos

Product Owner
Owns a major product area
Any Team

QA Engineer discusses requirement with the Product Owner

Test Architect
Leads cross-team quality practices
Quality Assurance

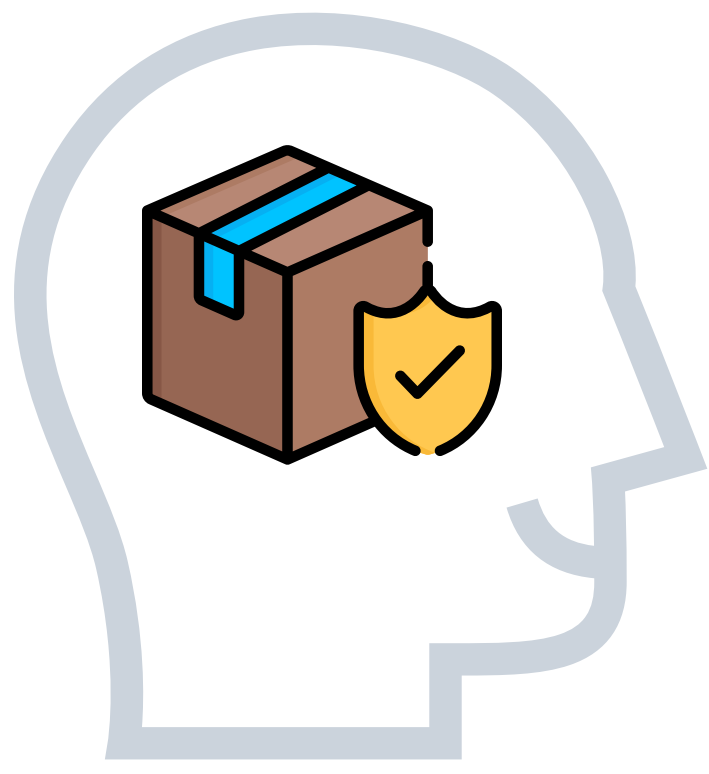QA Engineer reaches out for guidance whenever required

Engineering Manager
Manages feature development
Any Team

QA Engineer discusses requirement and test reviews

Release Manager

"I want to plan for current and future releases by faciliating collaboration between tehnical and non-technical teams to drive quality product development"

Goals

- To plan and deliver major, minor and patch releases by packaging code received from various teams, carrying out quality checks and sharing its availability with clients so they can access new features
- Checks goal progress with tribes, escalates resourcing issues and connects various engineering teams to keep the project on track. Also checks for internal adoption and backward compatibility of all epics
- Faciliates Release Escalation Meetings to discuss progress on release milestones and assesse any risk.
- Works with platform teams to ensure bugs assigned to them are resolved in time for certification
- Works with Keep Pega Current team to provide GA builds to the consuming platform teams

Key drivers

- On time delivery for major, minor and patch releases with utmost quality

Tools

- Agile Studio - To check status of work items and communicate through pulse
- Jenkins - A DevOps tool for defining pipelines, packaging code and producing builds
- Trello - For task management
- App Factory - To create apps for automating the bug approval process using an app from App Factory
- Office 365 - For creating reports and presentations

Main stakeholders

Alliance & Tribe Leaders
Owns major product areas
Any Team

Release Manager facilitates initial discusison between tribe leaders & executives to define release goal

Platform Engineering Leaders
Responsible for product development
Any Team

Release manager reached out to communicate on code packaging and build creation
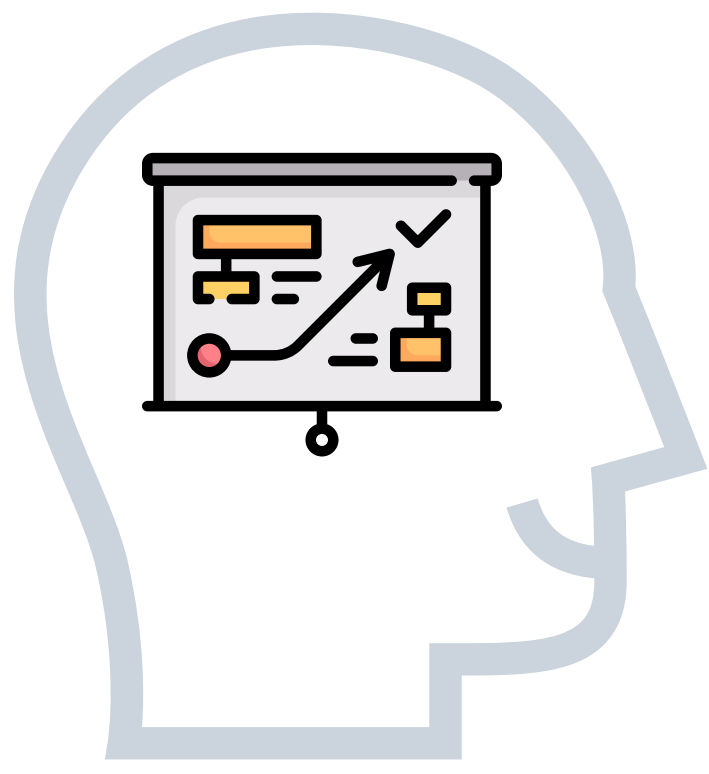
Product Executive
Own all Pega Products
Executives

Release Manager facilitates release escalation meetings during development to assess risks and discuss release trend

Scrum Master

"I want to help scrum teams become self organised, and resolve impediments so that they are more efficient and are able to deliver the work planned for every sprint"

Goals

- Ensures architecture, test plans, designs & acceptance criteria are ready before development begins
- Conducts Sprint grooming to discuss upcoming release work and prioritise epics
- Conducts Sprint Planning to discuss implementation and design of user stories in prioritised epics
- Conducts daily scrum once development begins to discuss updates and blockers
- Facilitates reprioritisation on account of escalated servcie requests (SR) and sustaining engineering items (SE)

Key drivers

- Epic cycle time & Epic reaction time
- Epic committment vs. epic delivery
- Number of high priority bugs indicates missed use cases
- Reduce number of SEs with time
- Automation coverage & Hardening Index

Tools

- Agile Studio - To check backlog health, status of bugs and user stories
- Online Boards - To make retros interactive
- Webex Meeting - To record sprint reviews
- Office 365 - To make reports that can't be derived directly from Agile Studio
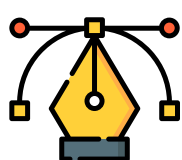
Main stakeholders

Platform Engineer
Develops features
Any Team

Scrum master checks in with engineers for development status and resolving obstacles

Product Owner
Owns product vision
Any Team

Scrum master works with product owner to prioritize epics and identify obstacles

UX Designer
Designs experiences
Platform UX

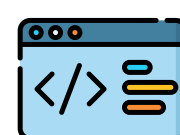Scrum master checks in with UX Designer to receive the designs and faciliates alignment on feasibility
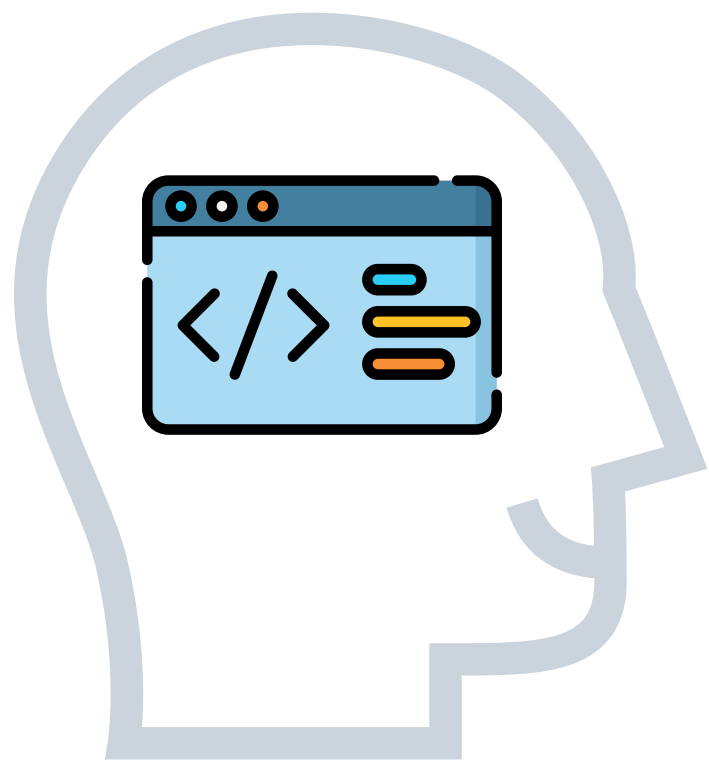
Consuming Team Engineer
Develops features
Any Team

Scrum master coordinates with consuming team engineers to resolve dependencies & take feedback on features

Research & Development (R&D)

Software Engineer

"To write bug free code for features with a scalable design, low latency and high throughput covering the maximum test cases possible"

Goals

- Works with product owner and the UX Designer to understand requirements and discuss implementation
- Defines high level technical user stories, their order of priority and time estimated for developmen
- Works on the technical design of the feature. i.e. defines the data model
- As a SWAT team member resolves sustaining engineering (SE) items reported by customers
- Interacts with internal engineering teams to resolve bugs and interdependencies

Key drivers

- Sprint committment vs. sprint delivery
- Definition of Done (DOD) - meeting acceptance criteria, ensuring performance & backward compatibility
- Trend of bugs over time & Time spent on bug vs feature work
- Keeping Hardening Index in green state & meeting Code compliance score targets

Tools

- Vagrant - Virtual machine setup for launching development infra for writing engine code
- GIT - Code versioning
- Intelli J IDE - For editing engine code written in java
- Agile studio - To communicate with team and update the status of stories
- Dev studio - For end to end feature development and to verify developed features
- Global Client Support (GCS) Portal -To check SE items

Main stakeholders

Product & Engineering Leaders
Owns product vision & delivery
Any Team
Software Engineer reaches out to discuss technical design, providing updates or giving sprint demos

Product Owner
Owns product vision
Any Team
Software Engineer discusses requirement and acceptance criteria for user stories

Consuming Team Engineer
Develops features
Any Team
Software Engineer reaches out to assist in adoption, understand bugs reported by consuming teams or work on interdependent features

Support Engineers
Resolves client issues
Global Customer Service
Software engineer coordinates with Support Engineers to resolve complex client issues

Tribe Leader

"I am responsible for end to end client experience & want to make a positive difference in how Pega products are received"

Goals

- Defines areas for product owners & engineering leaders to focus on in a release ensuring unified vision
- Defines acceptance criteria and resolves dependancies to ensure the scrum team has the required clarity
- Collaborates with sales, enablement and marketing to frame the right messaging to position the product
- Ensuring smooth internal as well as external adoption and providing support in case of issues
- Take account of sustaining engineering (SE) items & feedback from clients to prioritise feature development

Key drivers

- Support requests (SR) converted to sustaining engineering (SE) items
- Reducing the number of SE items and their resolution time
- Time spent on new features vs. bugs
- Reduce number of SEs with time
- Improvement of quality practices over releases, e.g. decrease automation backlog and manual validation
- Number of internal and external clients that have adopted the features and issues reported by them

Tools

- Agile Studio - For monitoring release
  goals & feedback items
- App Studio & Dev Studio - To test features once they have been developed
- Lucid Charts, X Mind - For making complex charts and mindmaps
- Office 365 - For Info Visualisation and presentations
- lobal Client Support (GCS) Portal - For checking SE items

Main stakeholders

Alliance Leader
Owns several major product areas
Any Team

Tribe Leader coordinates with consuming team engineers to take feedback on adoption of features
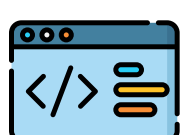
Product & Engineering Leaders
Owns product vision & delivery
Any Team

Tribe Leader defines areas for product owners & engineering leaders to focus on in a release

Consuming Team Engineer
Develops features
Any Team

Tribe Leader coordinates with consuming team engineers to take feedback on adoption of features
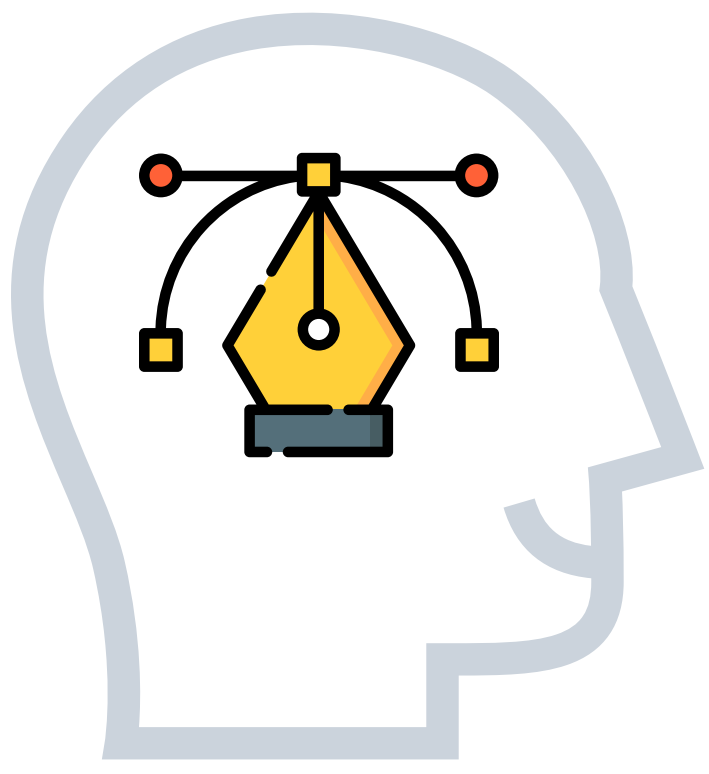
Account Executive
Responsible for product sales
Sales

Product Owner privides them materials and technical guidance to position features for clients

UX Designer

"I want to increase the value of Pega products by leveraging user centered design"

Goals

- Work with Product Owner to brainstorm various approaches to solve problems & achieve the product vision
- Conduct research to analyse similar products within Pega and those built by competitors
- Creates prototype to conduct user testing with internal users checking for task success and usability issues
- Seek feedback from engineering team on feasibility during grooming sessions
- Contribute to strategic design lead initiatives such as Cosmos and Client self service portal

Key drivers

- UX value - Helps assign design resources as per project complexity
- Whether design is researched and validated with Product Owner for solving problems in the right manner
- Qualitative feedback from product owners, engineering teams and leadership
- Qualitative feedback received during Usability testing
- Impact created by feature demos at major events such as Pega world

Tools

- Sketch & InVision - To design
  interfaces and create prototypes
- Agile Studio - To collaborate with goal and release owners on planning and artefacts
- Pega Platform - To validate implementation and provide feedback to developers
- Powerpoint & Keynote - To create content for product demos for presentations

Main stakeholders

Peer Designer
Develops features
Any Team

UX Designer reaches out to peers critique, discussing design patterns & resolving dependencies

Product Owner
Owns a major product area
Any Team

UX Designer discusses requirement and brainstorms solutions

Platform Engineer
Develops features
Any Platform Team

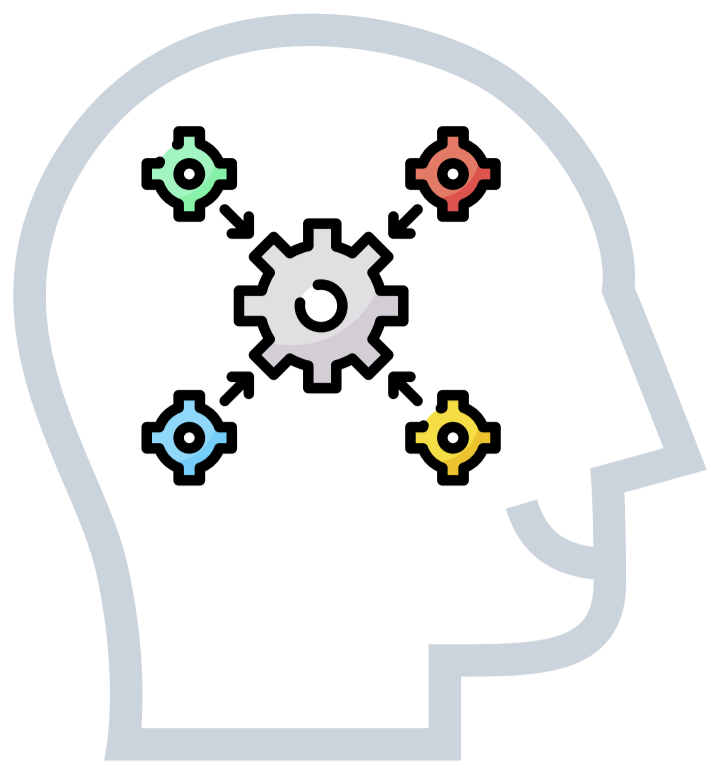UX Designer & playform engineer exchange feedback on feasilbility of designs & UI implementation

Technical Writer
Writes Copy & product documentation
Enablement

UX Designer reaches out for guidance on product copy

Workforce Intelligence

Business Administrator

"I want to get everything set up, so that everyone has a valuable experience with the product"

Goals

- Review, set, and configure the application in order best display data for the analysts and managers
- Runtime is successfully set up and deployed to all data collectors

Key drivers

- Organization structure
- Mapped and tagged applications/screens
- Latest runtime version
- Screen rules
- Processes

Tools

- Email/Chat
- Runtime version assignments

Main stakeholders

Frontline manager
I want my team to be efficient and productive, so our clients are provided with great customer service
Workforce Intelligence
Weekly checkin on reports

Consultant
I want to help clients set up new WFI implementations, so that they are getting the most out of the product
Workforce Intelligence
Ad hoc only when needed

Tech Administrator
I want to make sure runtime and automations are deployed properly, so that everything is running as expected
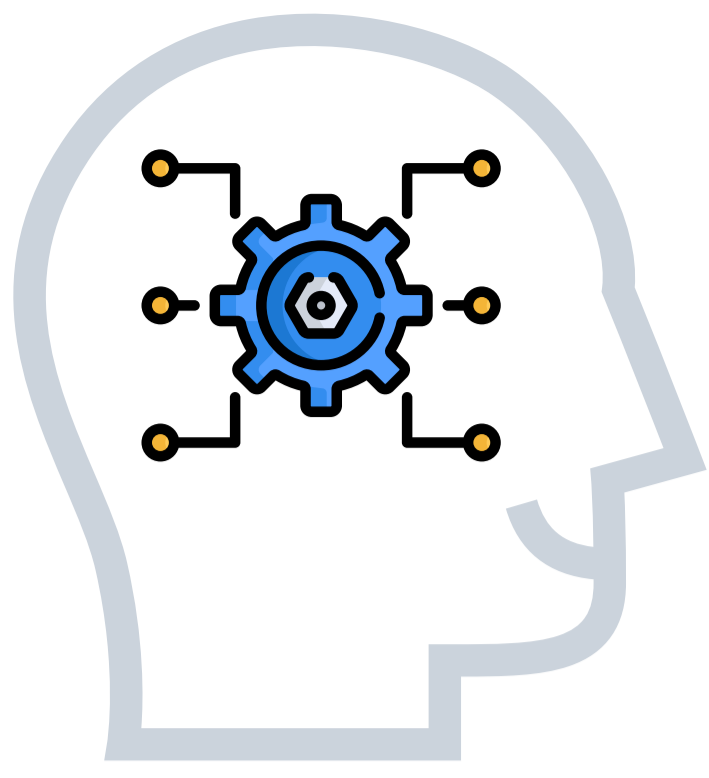**Workforce Intelligence**
Bi-weekly & dashboards

Pega Service Delivery
I want to ensure successful WFI implementation, so that the client gets the most value out of the product
Workforce Intelligence
Initial runtime setup & support

Design.Pega.com

Business Analyst

"I want to have access to all information and insights, so that I can continuously improve operations"

Goals

- Assist in defining the best and most efficient ways to do production work
- Work with managers to ensure the correct standards are met
- Find automations
- Continuous improvement of the standards
- All data is exportable for reports and other business insights

Key drivers

- Cost savings
- Automation potential
- Business operation performance

Tools

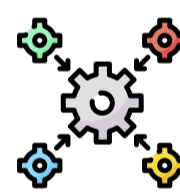- Email/Chat
- Webex/Calls
- Excel

Main stakeholders

Frontline manager
I want my team to be efficient and productive, so our clients are provided with great customer service

Workforce Intelligence

Defining standards

Business Administrator
I want to get everything set up, so that everyone has a valuable experience with the product"

Workforce Intelligence

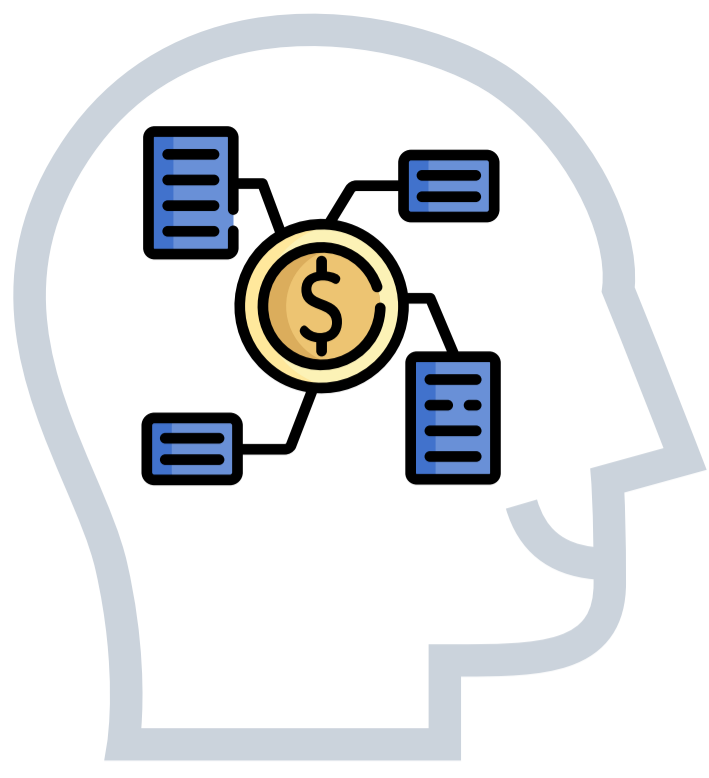Categorization and tagging of applications

Tech Administrator
I want to make sure runtime and automations are deployed properly, so that everything is running as expected

Workforce Intelligence

Send automation requests

Workforce Intelligence

Consultant

"I want to help clients understand the value of the product, so that they become long-term clients

Goals

- Help clients see the value of Pega Products
- Ensures clients are using and understand WFI
- Highlights the needs of other Pega Products by using WFI
- Acess data to back up the need for other Pega products (Processes, Automations, Opportunities)
- Show clients where and how to find efficiencies or coaching opportunities

Key drivers

- Sales quota
- Renew contracts

Tools

- Email/Chat
- CRM
- Pega Sales Automation

Main stakeholders

Tech Administrator
I want to make sure runtime and automations are deployed properly, so that everything is running as expected
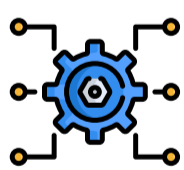**Workforce Intelligence**
Runtime is deployed and configured

Sponsor
I want to pick the best technology solutions for my company, so that I can bring value at a reasonable cost
Workforce Intelligence
Demo & understand value

Business Analyst
I want to have access to all information and insights, so that I can continously improve operations
Workforce Intellgience
Fielding requests for automations & implementing automations

Pega Service Delivery
I want to ensure successful WFI implementation, so that the client gets the most value out of the product
Workforce Intelligence
Ensure rollout is successful

Workforce Intelligence

Employee

"I want to resolve work quickly and properly, so I can meet my quota and provide valuable service to my clients"

Goals

- See if their work is consistent or improving using coaching tools provided
- Compare their efforts with other team members
- Get rewarded or recognition
- Monitor their productivity
- See where they rank among their team members
- See how productive top ranking team members are

Key drivers

- Production score
- Average handle time
- FCR
- NPS
- Tickets open/resolved

Tools

- Phone
- CRM
- Email/Chat
- Printer

Main stakeholders

Frontline Manager

I want my team to be efficient and productive, so our clients are provided with great customer service

Workforce Intelligence

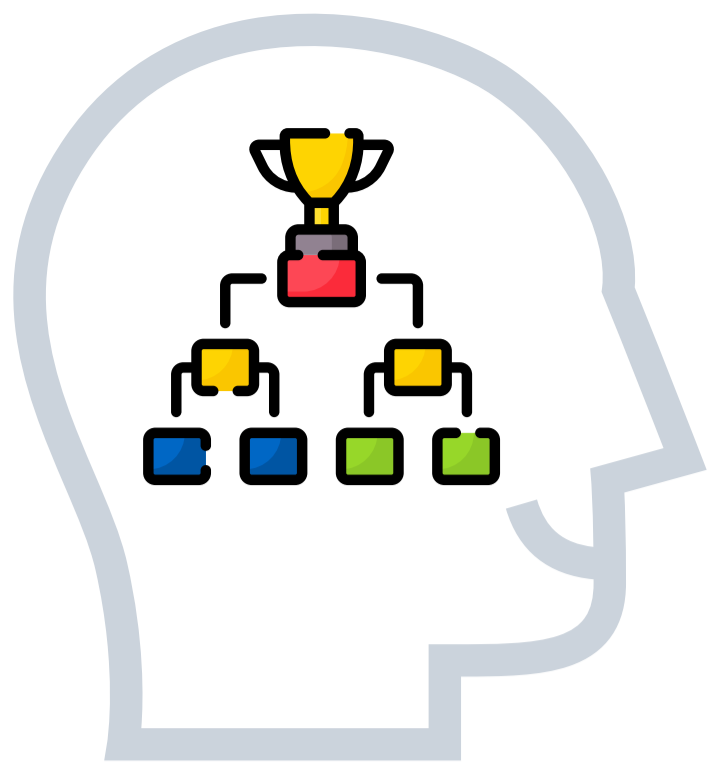For questions, coaching, and support & scalating issues

Tech Administrator

I want to make sure runtime and automations are deployed properly, so that everything is running as expected

Workforce Intelligence

Computer or phone problems & general IT

Frontline Manager

"I want my team to be efficient and productive, so our clients are provided with great customer service"

Goals

- Reduce employee turnover
- Ensure optimal team performance on call resolution
- Get high client satisfaction ranking
- Be knowledgeable to confidently inform and support clients
- Review the throughput of their team
- Coach team or individual employees
- Help other roles (Boss, Analyst, IT) see their needs for automations, new standards, efficiencies, etc.

Key drivers

- Production score
- Average handle time
- FCR
- NPS
- Tickets open/resolved

Tools

- Call center application
- Schedule application
- Email/Chat
- CRM
- Phone
- Printer

Main stakeholders

Business Analyst
I want to have access to all information and insights, so that I can continuously improve operations

Workforce Intelligence

Ensuring optimal team performance & client satisfaction goals

Employee (monitored user)
I want to resolve work quickly and properly, so I can meet my quota and provide valuable service"

Workforce Intelligence

Coaching & supporting

Tech Administrator
I want to make sure runtime and automations are deployed properly, so that everything is running as expected

Workforce Intelligence

Assists with new hires & general IT needs & automations

Workforce Intelligence

Pega Analyst

"I want to help clients understand their data, so that they can optimize operations and evaluate improvements"

Goals

- Analyze clients data to discover and make recommendations on useful features for our clients
- Assist in determining ways to provide more meaningful data.
- Review client's data to provide answers to the client, so they don't have to go searching for the answers.
- Creating algorithms that enhance and drive decisions in the product

Key drivers

- Available solutions
- New features
- New insights
- New algorithms

Tools

- Excel
- Tableau
- Python
- Sql
- Hadoop
- (Language?)

Main stakeholders

Business Analyst
I want to have access to all information and insights, so that I can continuously improve operations
Workforce Intelligence
Validate new ideas/features

Business Administrator
I want to get everything set up, so that everyone has a valuable experience with the product"
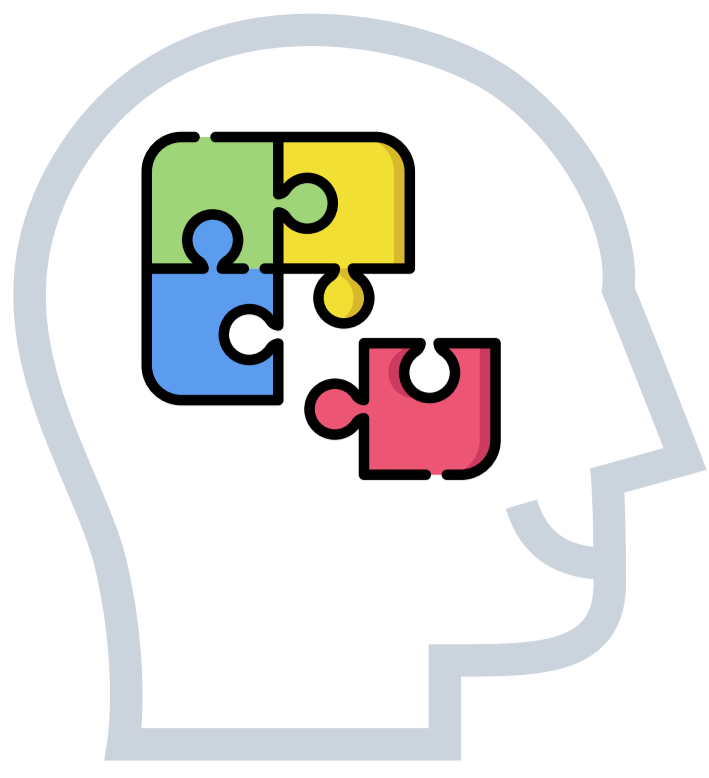**Workforce Intelligence**
Share findings for data management

Pega Service Delivery
I want to ensure successful WFI implementation, so that the client gets the most value out of the product
Workforce Intelligence
Ad hoc & align clients with Pega

Workforce Intelligence

Pega Cloud Ops

"I want to monitor client environments, so that they have continous operation

Goals

- Access client infomration, such as: logs of the WFI WOrker, Node API, and Ingest
- Answer questions like "Are we using the right instance sizes for performance monitoring"
- Quickly stand up or upgrade environments for clients
- Monitor clients' stack to ensure they remain up and running
- Bulk hierarchy updates
- Intelligent monitoring

Key drivers

- Logs
- Instance sizes
- Performance monitoring goals

Tools

- AWS console
- Email/Chat
- Database
- SSH

Main stakeholders

Pega Support

I want to resolve client issues quickly, so that I can meet SLA's

Workforce Intelligence
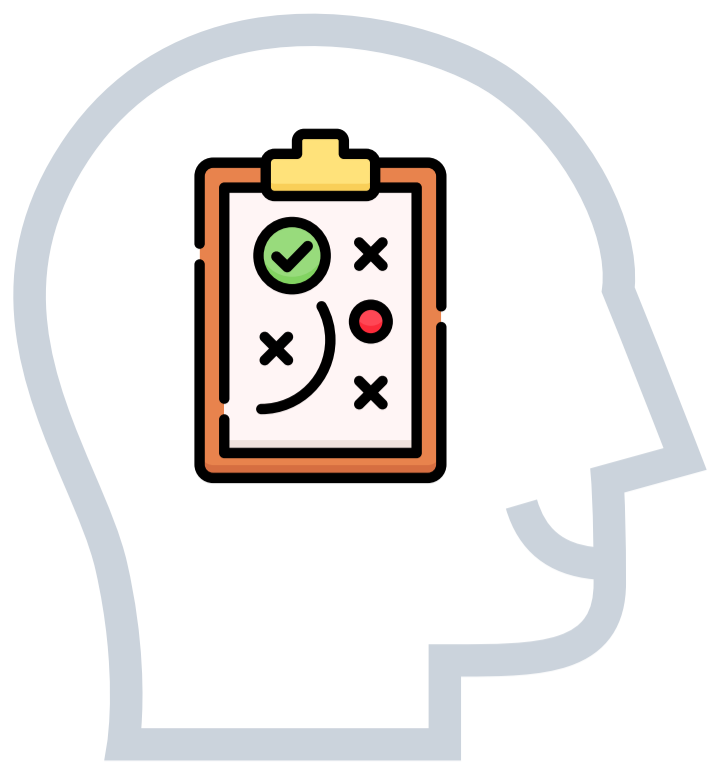
Exploring or resolving alerts and production issues

Pega Service Delivery

I want to ensure successful WFI implementation, so that the client gets the most value out of the product

Workforce Intelligence

Exploring or resolving alerts and production issues

Pega Service Delivery

"I want to ensure sucessful WFI implementation, so that the client gets the most value out of the product

Goals

- Ensure the client has a successful roll out of the Pega Product
- Continued support of the WFI clients
- Track rollout of runtime for who has received and who is waiting
- Adoption rates of the product
- Access client's usage, data, and application
- Assist in upgrading current clients
- Ensure clients are happy with the product

Key drivers

- Adoption rates
- Number of rollouts and upgrades
- Tickets resolved

Tools

- Email
- Webex/Calls
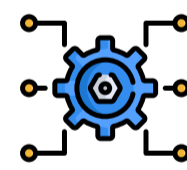- CRM

Main stakeholders

Business Administrator
I want to get everything set up, so that everyone has a valuable experience with the product

Workforce Intelligence

Assist in setting up application configurations

Business Analyst
I want to have access to all infomration and insights, so that I can continuously improve operations

Workforce Intelligence

Configure data for analysis

Tech Administrator
I want to make sure runtime and automations are deplyed properly, so that everything is running as expected

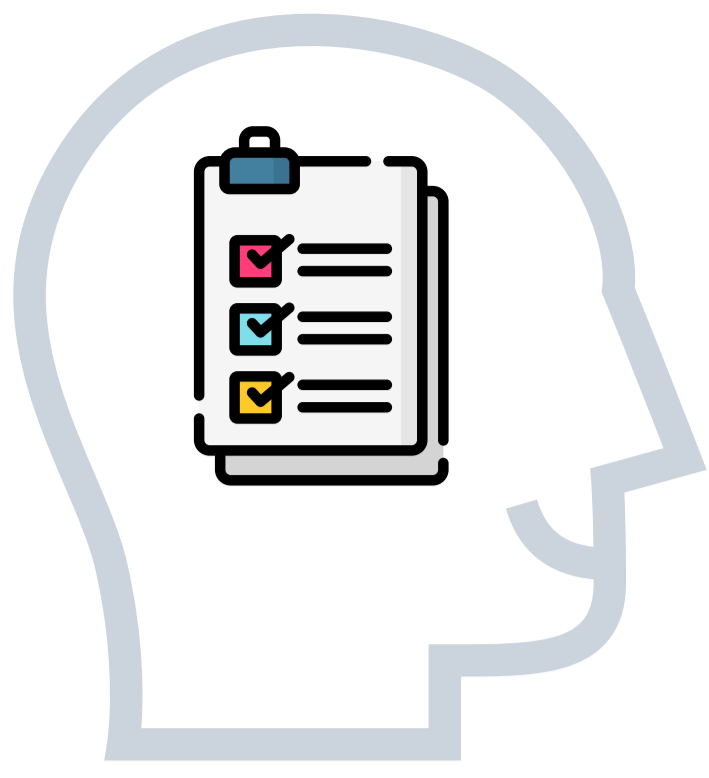**Workforce Intellgience**

Runtime configuration & automations

Pega Support
I want to resolve client issues quickly, so that I can meet SLA's

Workforce Intelligence

Assist in resolving tickets

Pega Support

"I want to resolve client issues quickly, so that I can meet SLA's"

Goals

- Support clients once their WFI solution has been rolled out
- Runtime client configurations
- Access clients's usage, data, and application
- Help troubleshoot client's issues
- Report any issues found

Key drivers

- SLAs
- Average resolution time
- First contact resolution
- Tickets resolved

Tools

- CRM
- Runtime
- Email/Chat
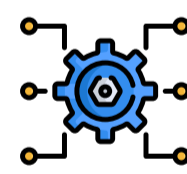- Webex/Calls

Main stakeholders

Business Administrator
I want to get everything set up, so that everyone has a valuable experience with the product
Workforce Intelligence
Submit tickets to support

Business Analyst
I want to have access to all infomration and insights, so that I can continuously improve operations
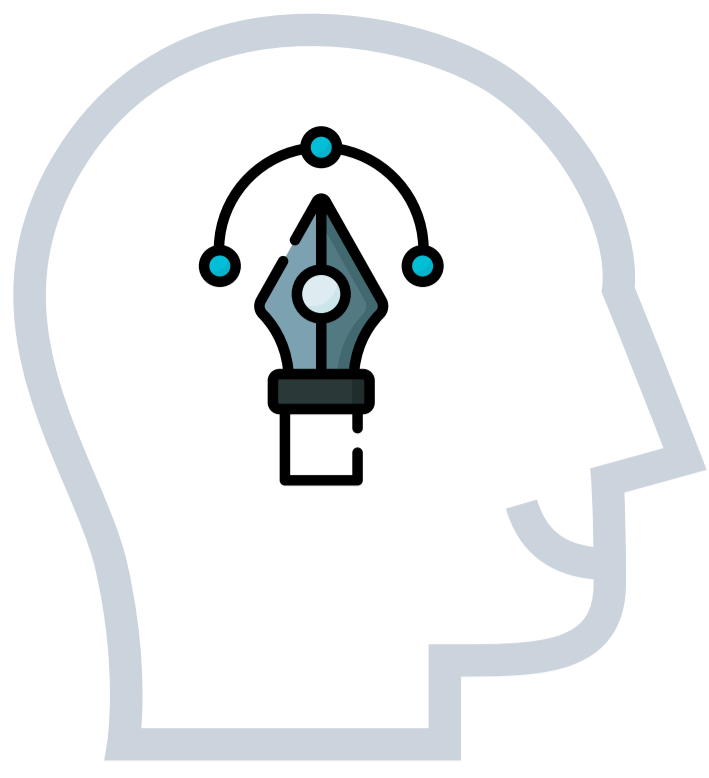**Workforce Intelligence**
Submit tickets to support

Pega Service Delivery
I want to ensure successful WFI implementation, so that the client gets the most value out of the product
Workforce Intellgience
Help resolve tickets

Workforce Intelligence

Sponsor

"I want to pick the best technology solutions for my company, so that I can bring value at a reasonable cost

Goals

- Understand, present, and share entire value of entire application
- Learn the basics of most pages
- Learn how they cna apply WFI to help their company save money
- Increase efficiency
- Improve processes, technology, and people

Key drivers

- Cost savings
- Efficiency
- RIO
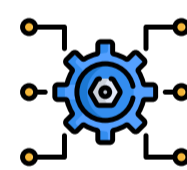
Tools

- Email
- Webex/Calls

Main stakeholders

Frontline Manager
I want my team to be efficient and productive, so our clients are provided with great customer service
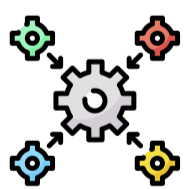**Workforce Intelligence**
Training & demoing

Business Analyst
I want to have access to all information and insights, so that I can continuously improve operations
Workforce Intelligence
Training & demoing

Business Administrator
 want to get everything set up, so that everyone has a valuable experience with the product
Workforce Intellgience
Get WFI configured

Tech Administrator
I want to make sure runtime and automations are deployed properly, so that everything is running as expected
Workforce Intelligence
Runtime is deplyed and configured

Pega Service Delivery
I want to ensure successful WFI implementation, so that the client gets the most value out of the product
Workforce Intelligence
Ensure rollout is successful

Consultant
I want to help clients set up new WFI implementations, so that they are getting the most ouf the product
Workforce Intelligence
Included in sales process

Workforce Intelligence

Tech Administrator

"I want to make sure runtime and automations are deployed properly, so that everything is running as expected

Goals

- Get everyone up and running quickly
- Ensure system is running as expected
- Have enough information to decide if something is working or not working
- Effectively implement automation solutions and ensure they are being used
- Evaluate wait time for applications
- Build client configurations
- Assisting integration with other data (system event logs, APIs)

Key drivers

- Total automations
- Adoption rate
- Wait time

Tools

- Text/editor
- Email/Chat
- Automation builder
- Robot Manager

Main stakeholders

Frontline Managaer
I want my team to be efficient and productive, so our clients are provided with great customer service
Workforce Intelligence
Automation creation & general IT needs

Employee (monitored user)
I want to resolve work quickly and properly, so I can meet my quota and provide valuable service
Workforce Intelligence
Setting up new hires & General IT needs

Business Analyst
I want to have access to all information and insights, so that I can continuosly improve operations
Workforce Intellgience
Fielding requests for automations & implementing automations

Pega Service Delivery
I want to ensure successful WFI implementation, so that the client gets the most value out of the product
Workforce Intelligence
Deployment of runtime & client configurations