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How Pega Customer Decision Hub Can Solve Day-to-day Marketing Operations

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Business Excellence Director, Pega

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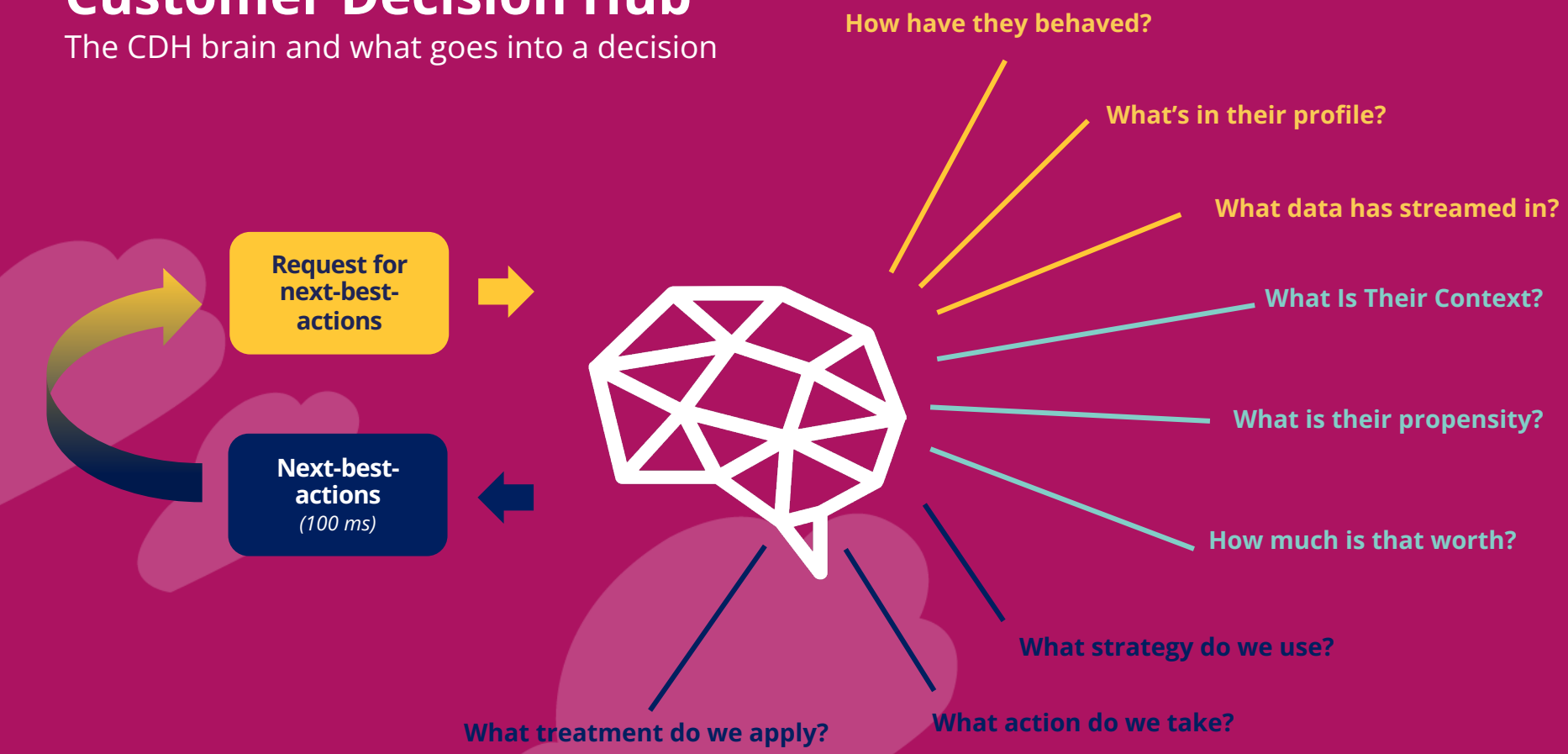
Customer Decision Hub

The CDH brain and what goes into a decision



Customer Decision Hub

The AI brain and what goes into a decision

Request for NBA(s)

Next-best-actions *(100 ms)*

Customer action library

Engagement policies

Constraints

Arbitration

The next best action(s)

The right message, paired with the right treatment, delivered at the best time, in the preferred channel

Web | In-person | Chat | Mobile | Email

Business operations

1:1 customer engagement

Making The Adoption Of CDH Easier

CDH best practices based on direct client engagement and collaboration

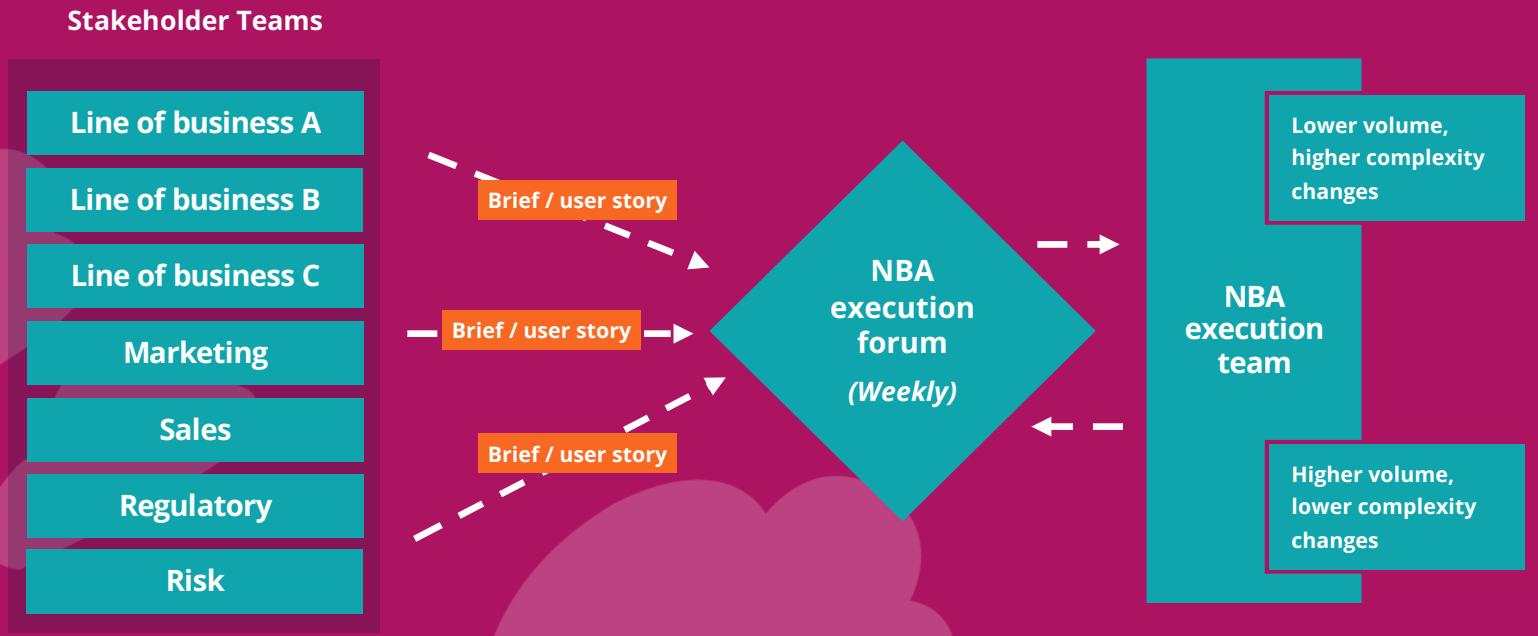
Pega

Clients

Partners

1:1 Business Operations

How business ideas are managed to production

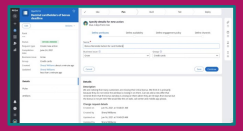


Business Operations Process

A high level view of business as usual with CDH

NBA designer

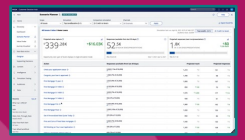
1:1 Ops manager



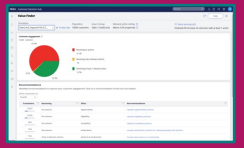
Performance tracker

Audience simulation

Scenario planner



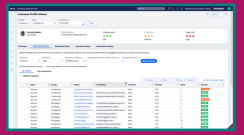
Value finder



Prediction studio

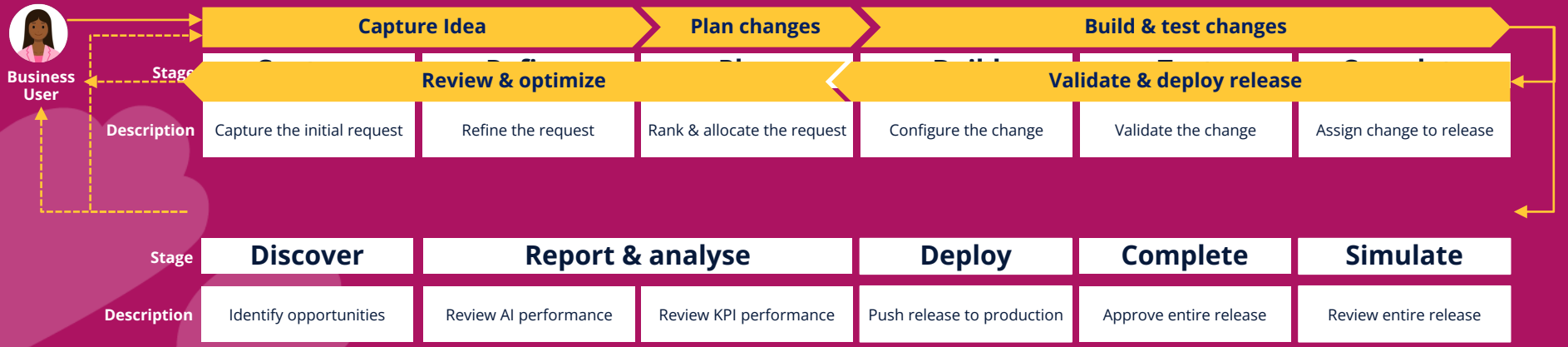
Impact analyzer

Customer profile viewer



Business Operations Process

A medium level view of business as usual with CDH



The scenario

A real-world use case to be explored

Introducing The Scenario

- This is a retail bank already live with Customer Decision Hub
- We have 2 product owners with requests this week:
  - Jack owns the credit card business
  - Diane owns mortgages and home loan products
- Jack has a new service offering and needs to launch various new comms in multiple channels
- Diane has a new mortgage calculator she wants to promote. She also is going to have an emergency request for a one-off outbound message

Business Operations Process

Capturing the idea

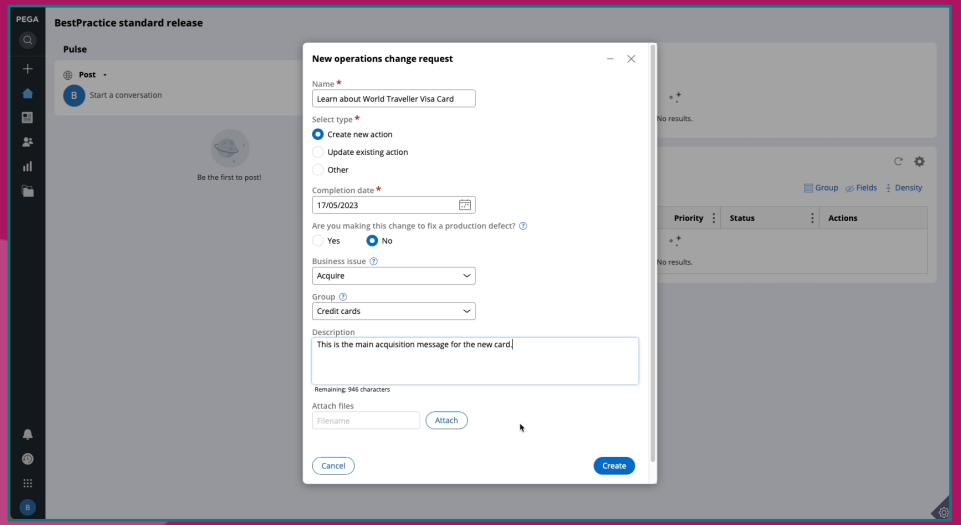
Business user

Capture idea

Capture

Capture the initial request

Acquisition – credit cards	1	Learn about world traveler visa card
	2	Balance transfer for world traveler visa card
Grow – credit cards	3	30 days 5% cashback
	4	2x points using apple pay for 30 days
Nurture – credit cards	5	Welcome to your new world traveler visa card
	6	FX savings with your world traveler visa card



Business Operations Process

Refining the idea

Business user

Capture idea

Refine

Refine the request

Grow – credit cards

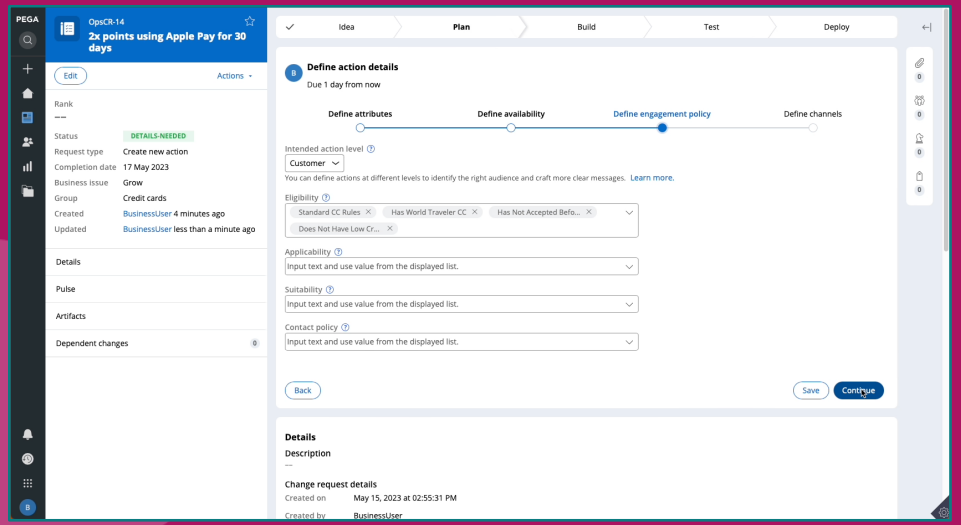
4

2x points using apple pay for 30 days

Engagement policy
- Standard card eligibility rules
- Has world traveler visa card
- Has not accepted offer before
- Does not have low credit score

Channel treatments
- Web
- Email

Business value: $500



Business Operations Process

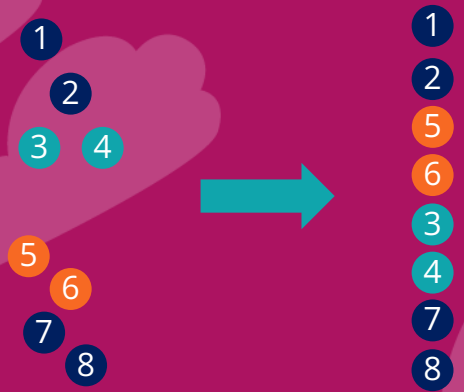
Planning the changes

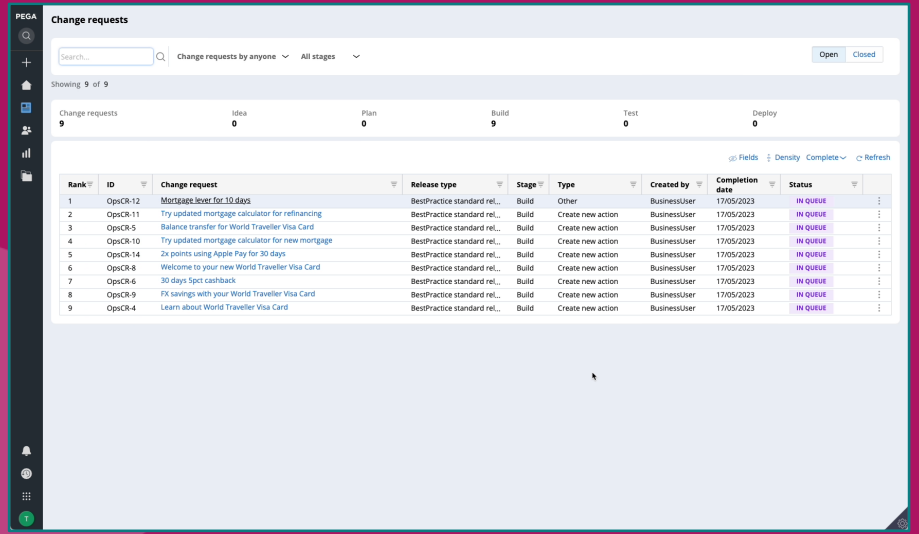
Business user

Capture idea → Plan changes

Plan

Rank & allocate the request





Business Operations Process

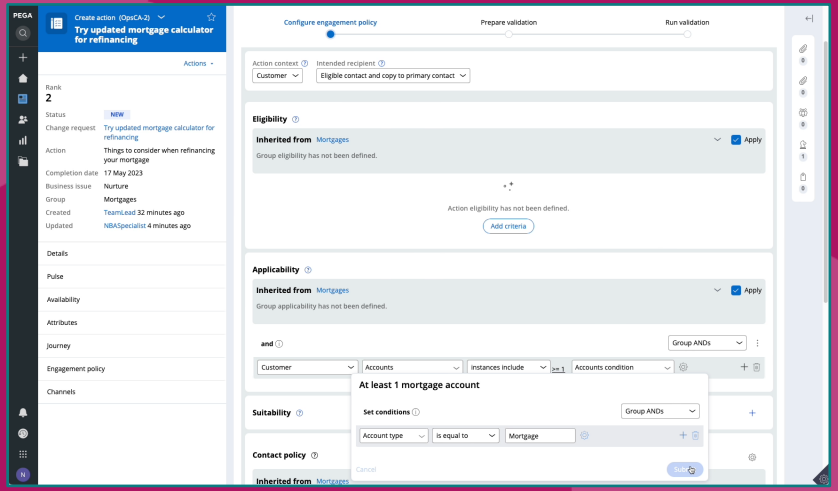
Building the changes

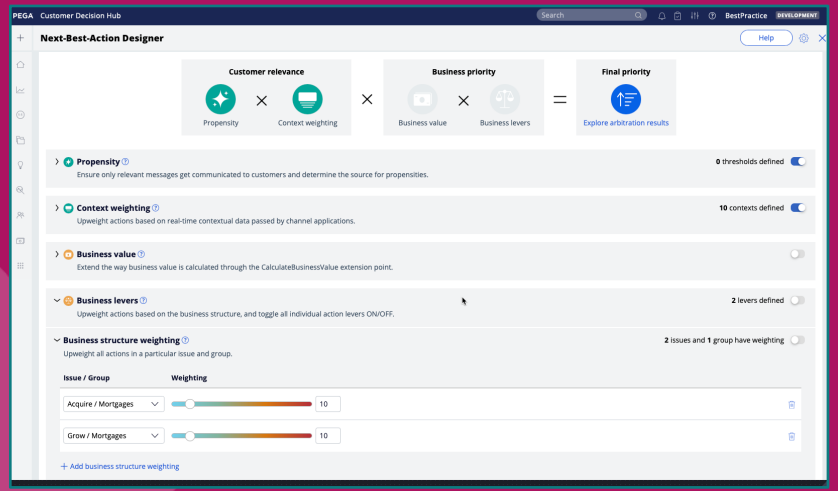
Business user

Capture idea → Plan changes → Build & test changes

Build

Configure the change





Business Operations Process

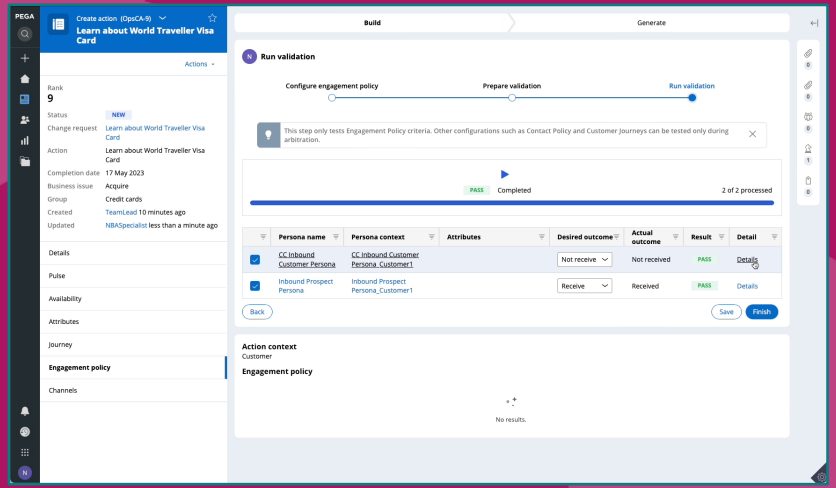
Testing the changes

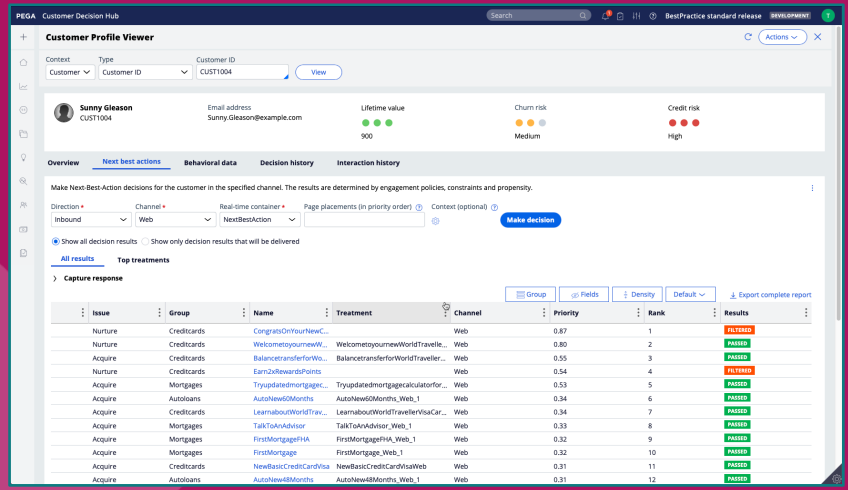
Business user

Capture idea → **Plan changes** → **Build & test changes**

Test

Validate the change





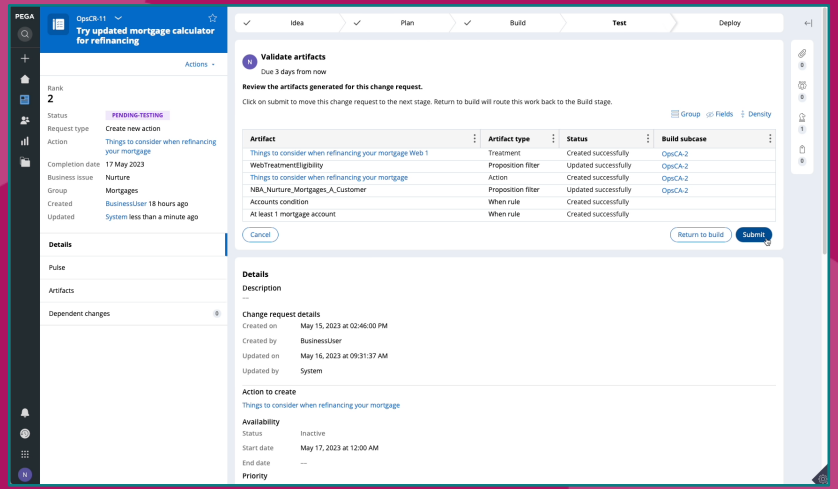
Business Operations Process

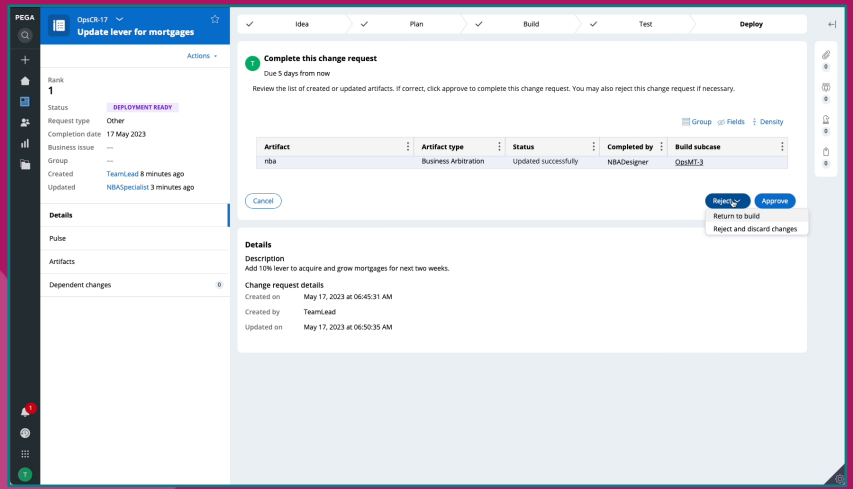
Completing the changes

Business user

Capture idea → Plan changes → Build & test changes → **Complete**

Assign change to release





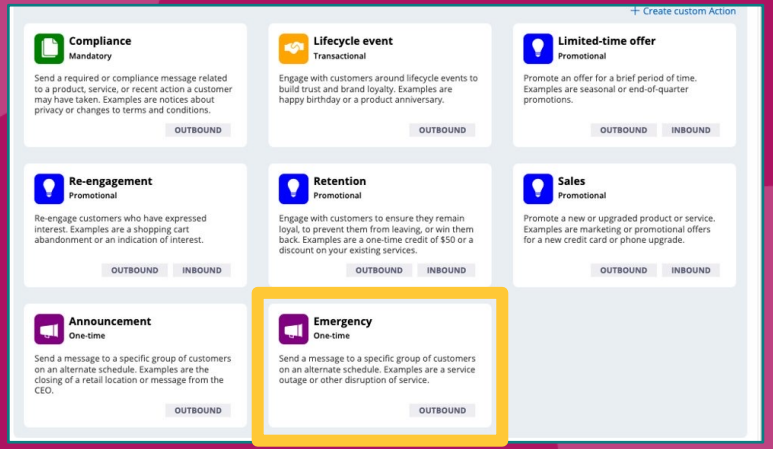
Business Operations Process

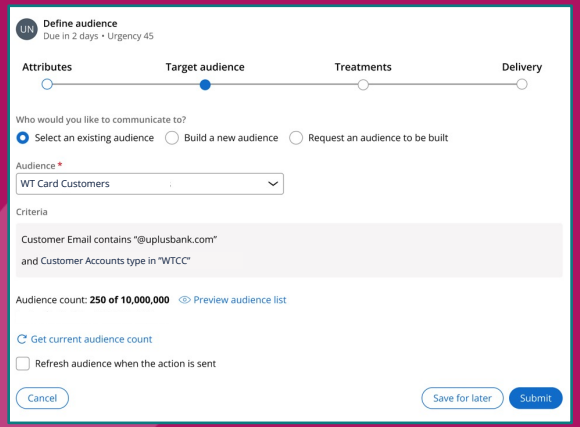
One time communications

Business user

Capture idea → Plan changes → Build & test changes

Emergency request to send an email out today to all customers with a particular mortgage product!





Business Operations Process

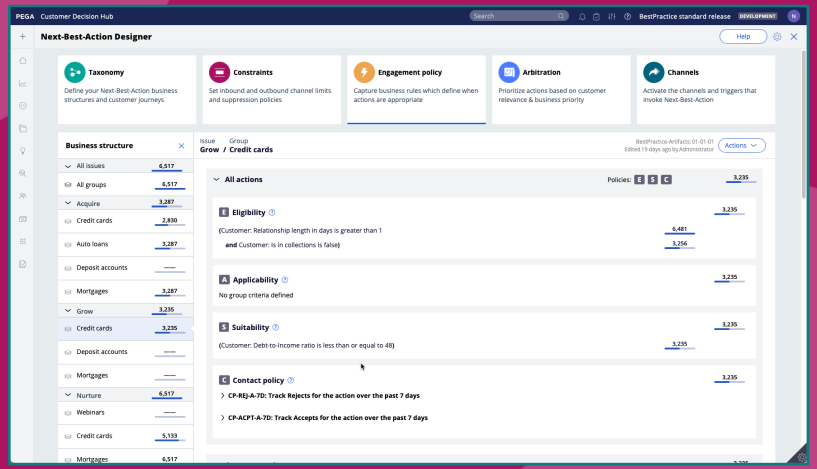
Simulating the release

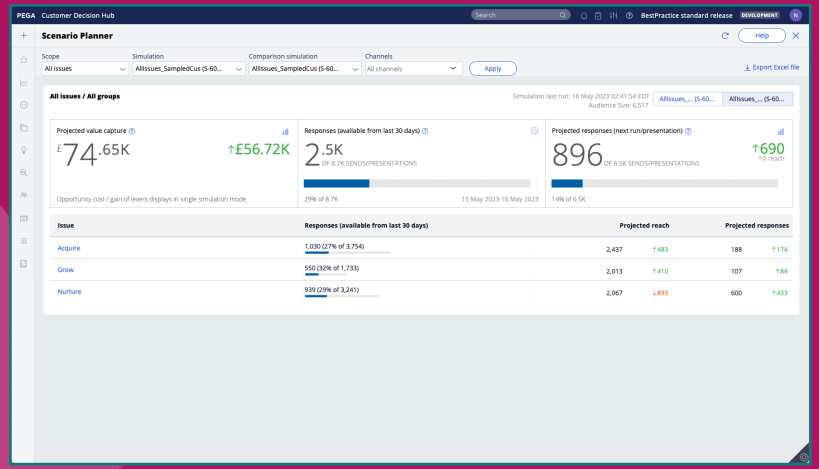
Business user

Capture idea → Plan changes → Build & test changes → Validate & deploy release → Review & optimize

Simulate

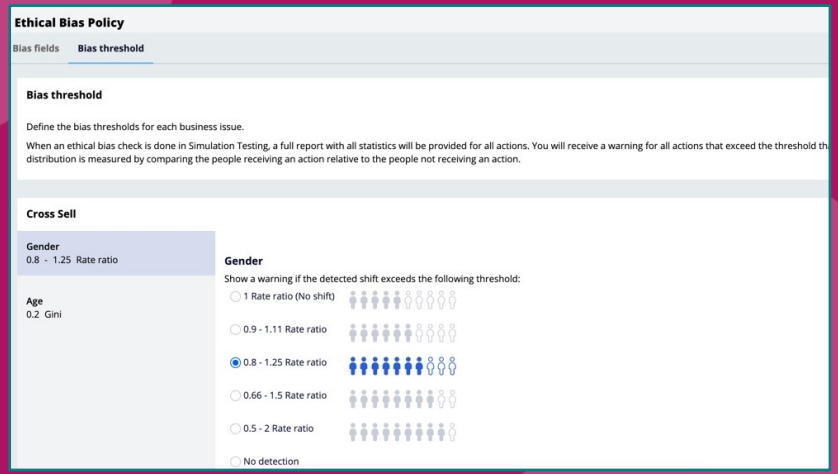
Review entire release

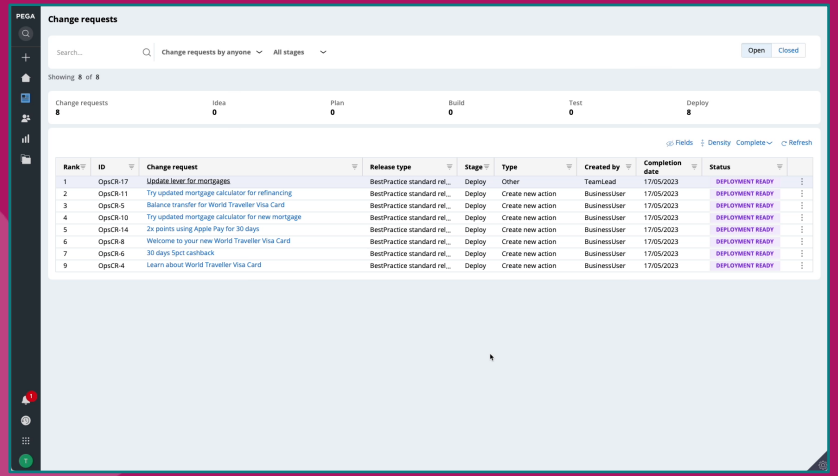




Business Operations Process

Completing the release





Business Operations Process

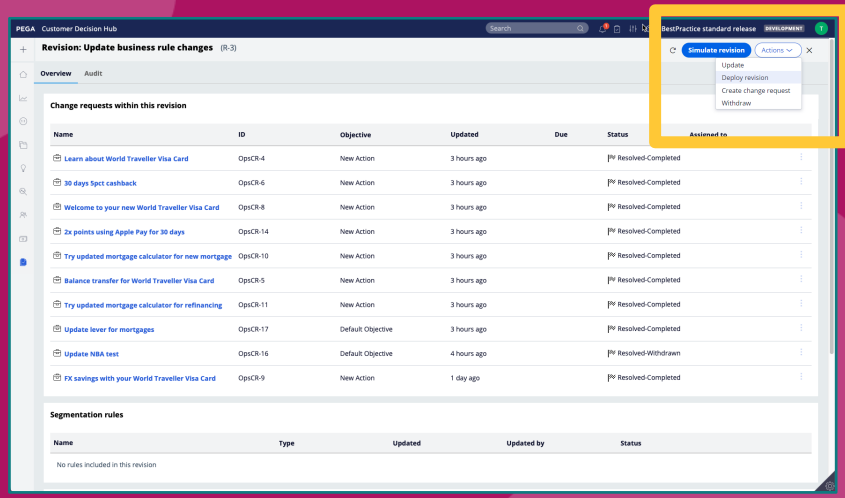
Deploying the release

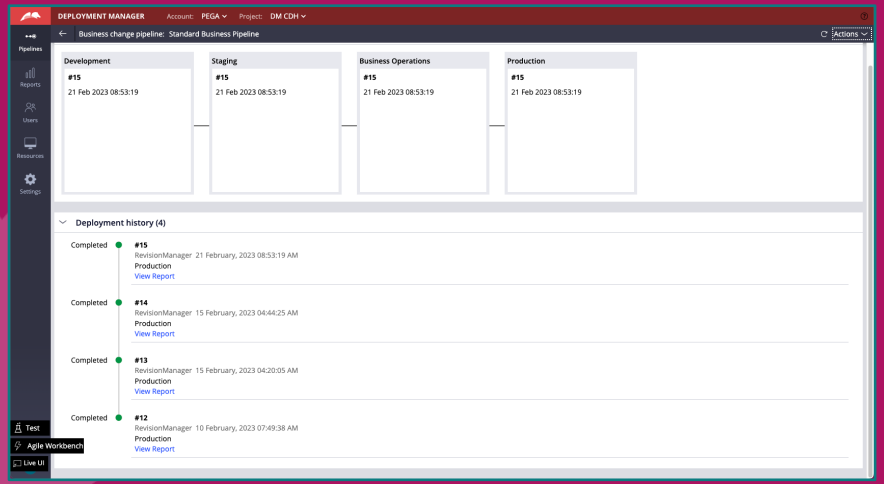
Business user

Capture idea → Plan changes → Build & test changes → Validate & deploy release → Review & optimize

Deploy

Push release to production





Business Operations Process

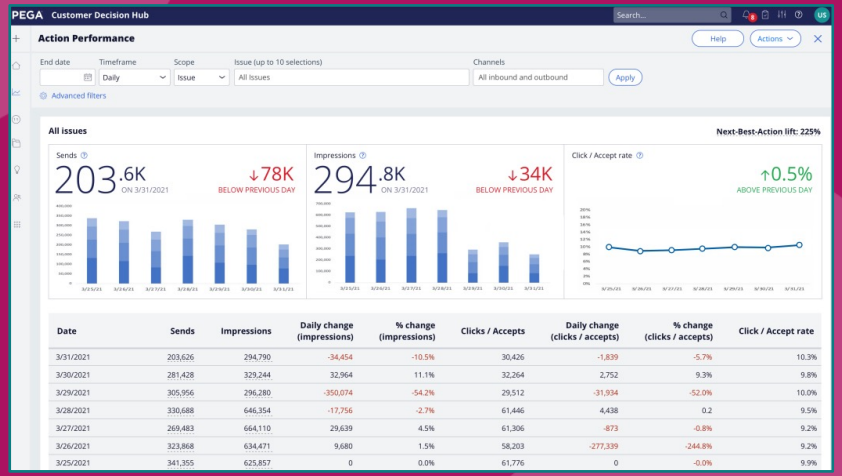
Reviewing the KPIs

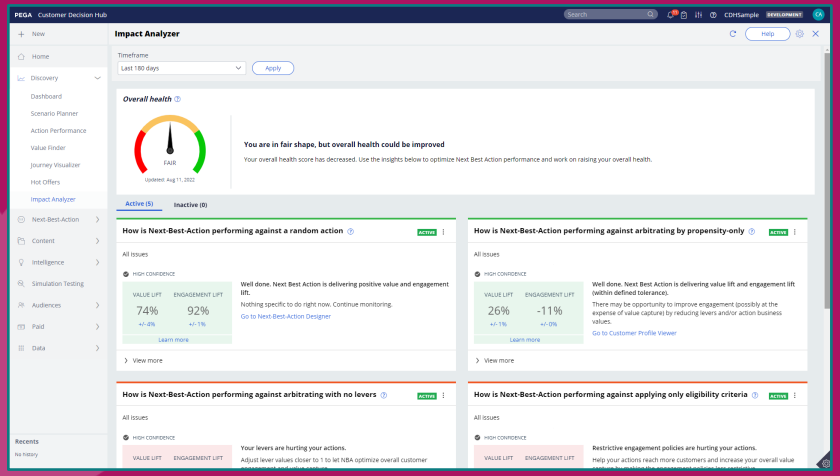
Business user

Capture idea → Plan changes → Build & test changes → Validate & deploy release → Review & optimize

Report & analyse

Review KPI performance



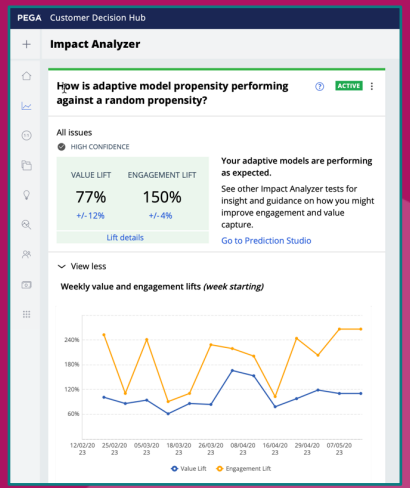


Business Operations Process

Reviewing the AI

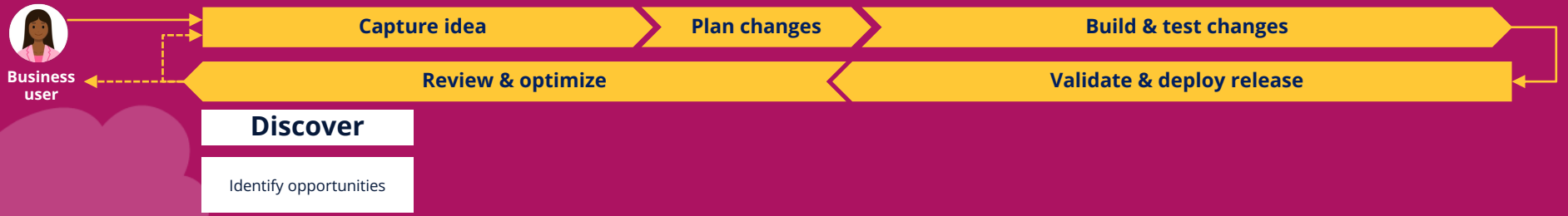
Report & analyse

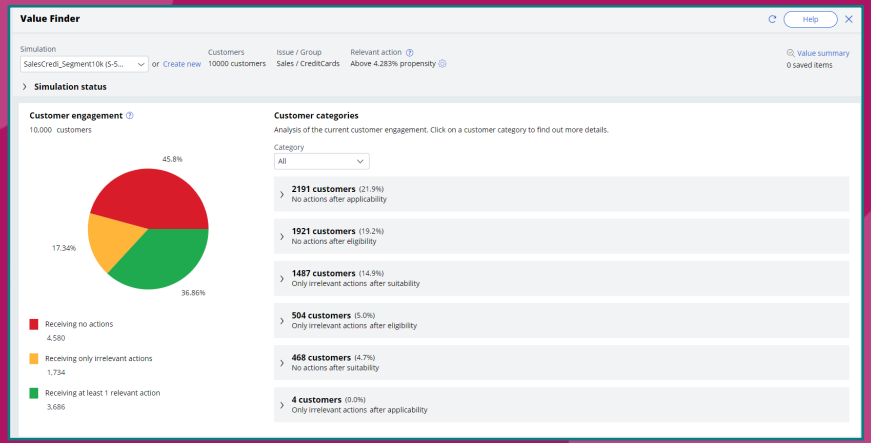
Review AI performance

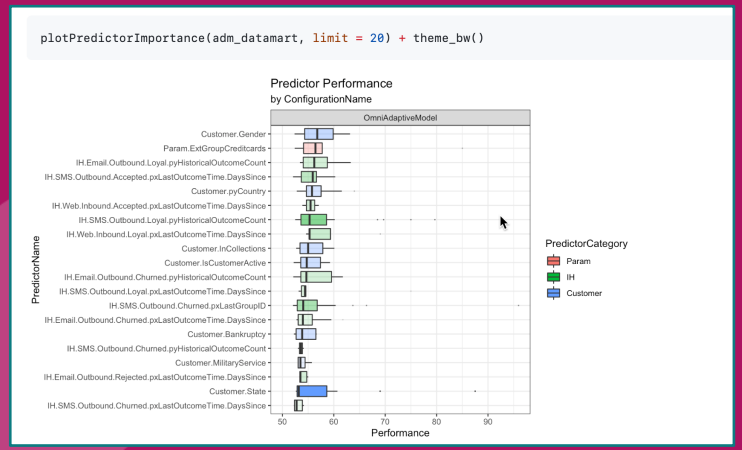


Business Operations Process

Identifying opportunities





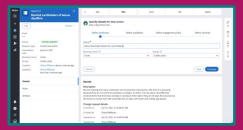


Business Operations Process

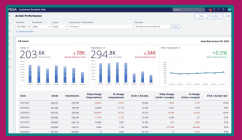
A high level view of Business As Usual with CDH

NBA designer

1:1 Ops manager

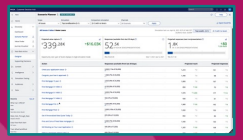


Performance tracker

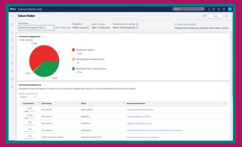


Audience simulation

Scenario planner



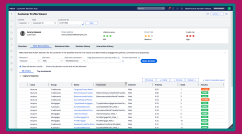
Value finder



Prediction studio

Impact analyzer

Customer profile viewer



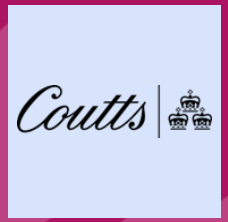
+300%
Offer conversion rate

50B
Decisions per year

+10X
Customer engagement

+600%
Response rate

+265%
Revenue per contact



35-1
Return on investment

400%
Web click-through

960K
Monthly offer accepts

+300%
Sales opportunities

46M
Decisions per month

#1
Customer experience

98%
Faster time-to-market

+200%
Positive CX per year

8 week
First deployment

+20%
Market share

Questions?

PEGA

PegaWorldiNspire