



PegaWorldiNspire

# How Vodafone Uses Pega to Deliver a Value-driven Retention Experience in Assisted and Digital Channels

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Always On Marketing - Decisioning Design Authority, Vodafone

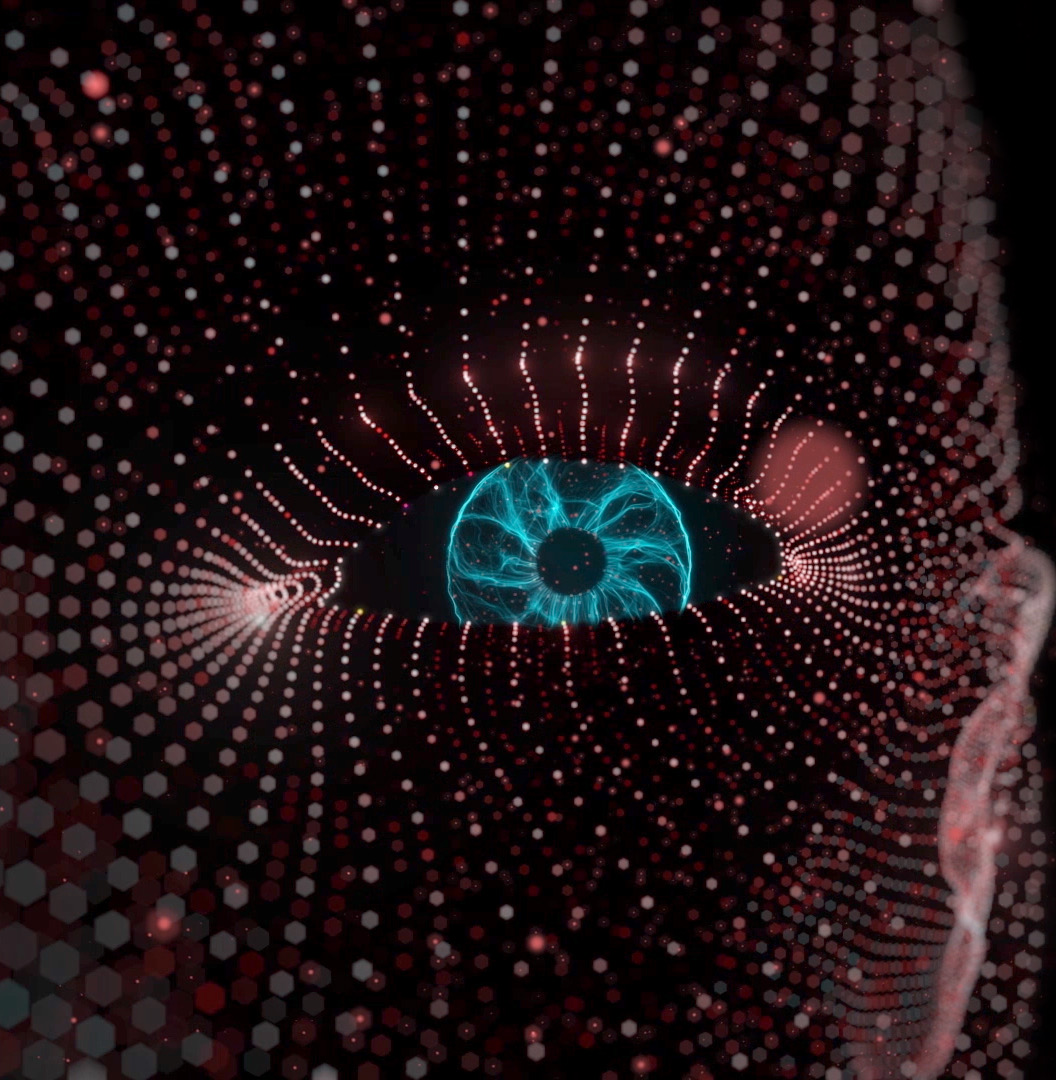
Efe Asci

Senior Manager - Base Growth Marketing,  
Customer Lifecycle Value Management & AI, Vodafone

Sameer Prakash

Chief Technical Officer, Adqura





**Always On  
Marketing**



**vodafone**

**Powered by**



# Who Are We?



Russell Welton

Decisioning Systems  
Authority

Vodafone UK



Efe Asci

Senior Base Growth  
Marketing Manager

Vodafone UK



Sameer Prakash

Chief Technology Officer

Adqura

# Vodafone UK – Always On Marketing Vision



## Vodafone Group

Global presence,  
Largest in Europe

**21 countries**

**Partners in 48**

## UK Customers

Mobile & Fixed Line

**18+m**

**Retail Stores**

**410**

**Broadband  
Customers**

**1.1+m**



**Mobile  
Coverage**

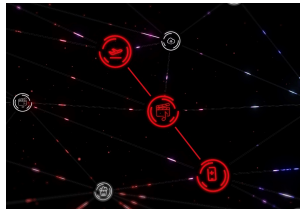
**99%**  
of UK population

Our Network is  
100% powered by  
renewable energy

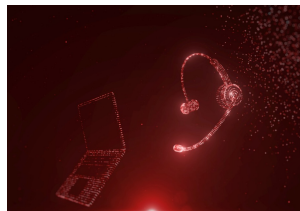
Our network powers  
critical national  
infrastructure and 77%  
of emergency services

Partnered with ITN to  
deliver coverage of the  
kings 2023 coronation  
over our 5GSA network

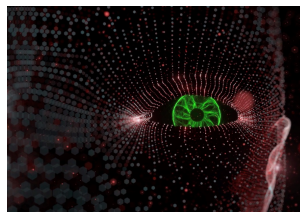
## AOM's Customer Centric Vision



We need to **move from a one way, product centric, transactional led approach to a truly 1-2-1 conversation that uniquely resonates with our customers**



This will be delivered into **one platform** that can be leveraged across **all of our channels** to predict and recommend **things our customers want or need** whilst delivering **business value**



Internally we will shift to being truly **customer centric**. We will continually optimise, look for efficiencies and improve experiences **by identifying single moments of truth** ensuring we focus on **what really matters to us and our customers**



# Problem Statement



Complex,  
aging decisioning systems

+



No common  
personalisation brain

=



Poor  
CXX

+



Missed value opportunities

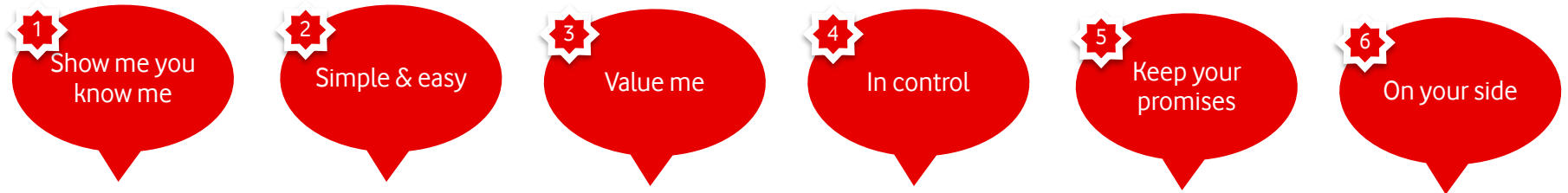
# Mission

To maximise our customer revenue and loyalty by delivering customer centric, connected service and marketing experiences driven through the power of Always on Marketing

## Value Drivers



## Customer Experience Principles

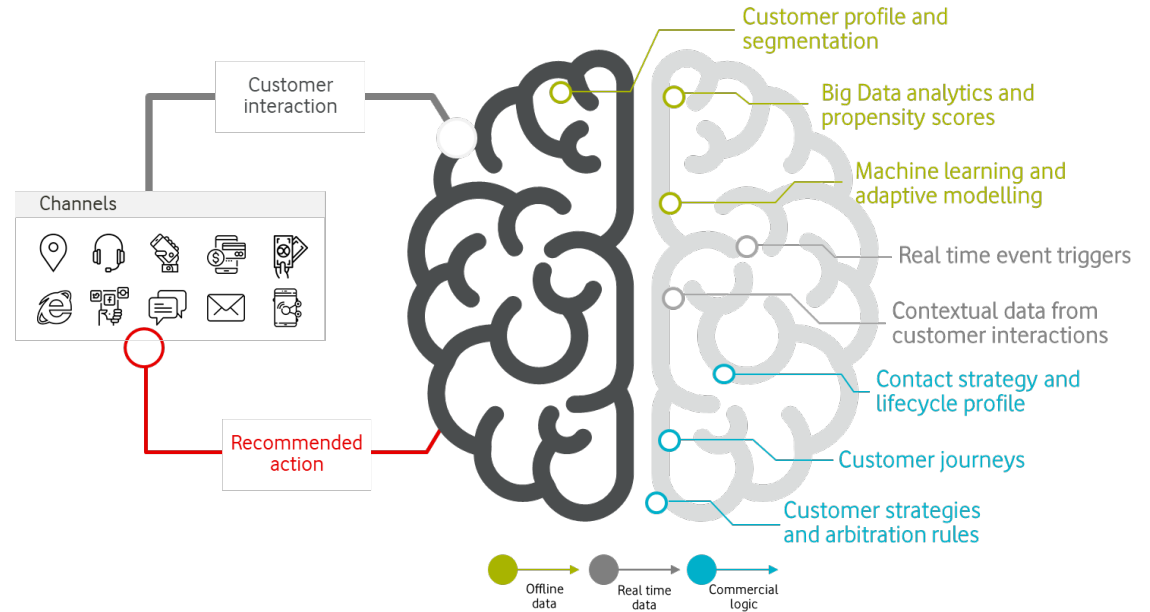




# Solution: An Always On Brain

Always on Marketing is a centralised decisioning hub (brain) - orchestrating conversations that we have with our customers through any channel (inbound and outbound), whether they be sales, marketing or service messages

AOM uses customer data, big data, real-time data and AI to decision on the Next Best Action; enabling connected and seamless customer journeys to drive an increase in NPS, revenue and retention







# An Upgrades Journey

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# Customer Retention – An Upgrade Journey That Reflects Customer Need

Our future state journey is based on the experience principles we have put together and what the essence of the AOM recommendations journey should look like for a customer progressing through a handset upgrade. At each stage of the process, we have identified the customer needs which has guided our design decisions when shaping our solution



# Customer Retention – Business Objectives



## Objectives

**Competitive offers**  
at individual level



**Individual pricing** driven by  
churn model and segment-  
level pricing

**Relevant offers** that  
meet **customer needs**  
and **business objectives**



**Recommendation logic**  
driven by **propensity models**  
and **business levers**

Offer **seamless upgrade  
experience** across  
channels



**Simple UI** to improve  
conversion and **tailor the  
offers presented** to customers

## How

## Presentation

Upgrade your SIM only plan to Pay Monthly and order the iPhone 12 today

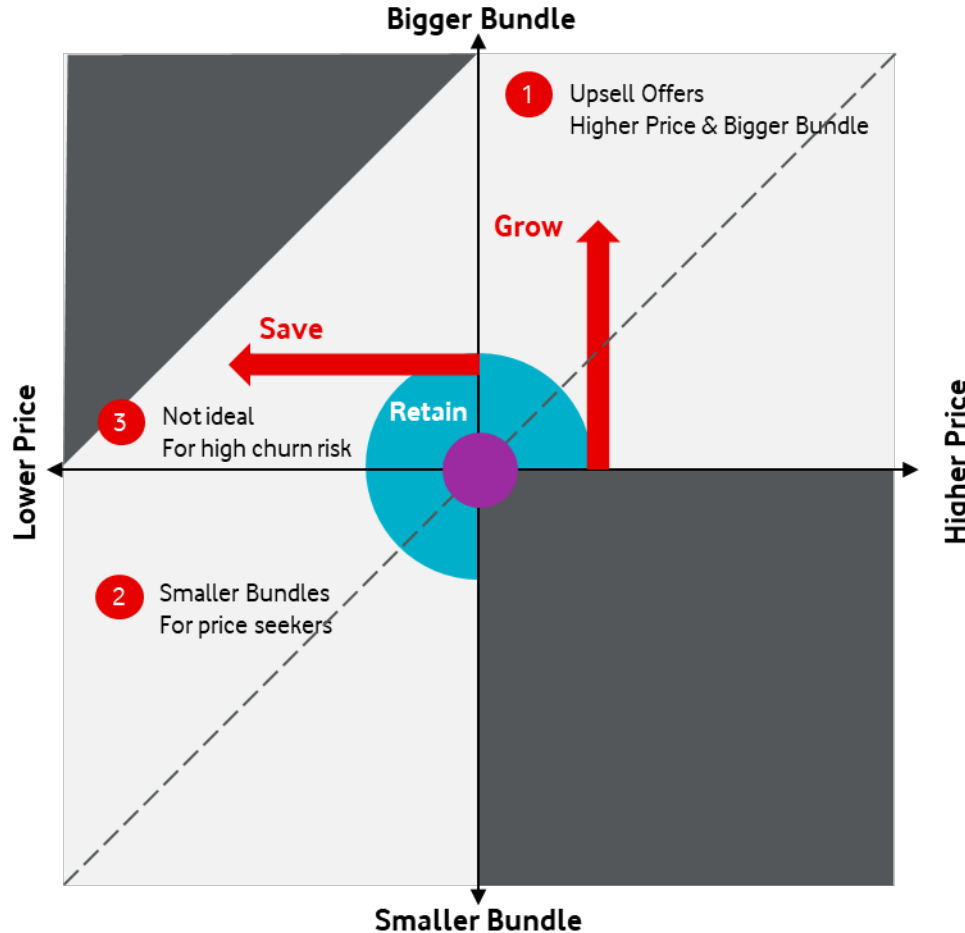
Meet your new phone and plan

The screenshot shows a promotional offer. On the left is an iPhone 12. In the middle is an 'Unlimited Max' SIM plan with 'Unlimited' data, minutes, and texts. On the right is a combined offer for 'Pay only £54 per month' (usually £57) which includes an iPhone 12 64GB, unlimited 5G data, and unlimited minutes and texts. A purple badge indicates a 15% discount on the monthly data plan.

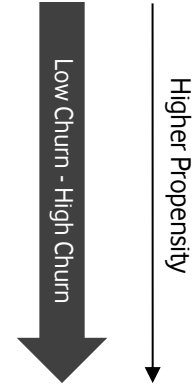
Your SIM only plan and phone:

The screenshot shows a promotional offer for a customer using an iPhone 11. It features an iPhone 11, an 'Unlimited' SIM plan with 'Unlimited' data, minutes, and texts, and a combined offer for 'You pay £28 per month' (usually £30) which includes an iPhone 11 32GB, unlimited data, and unlimited minutes and texts. A blue link 'How do we know this?' is visible.

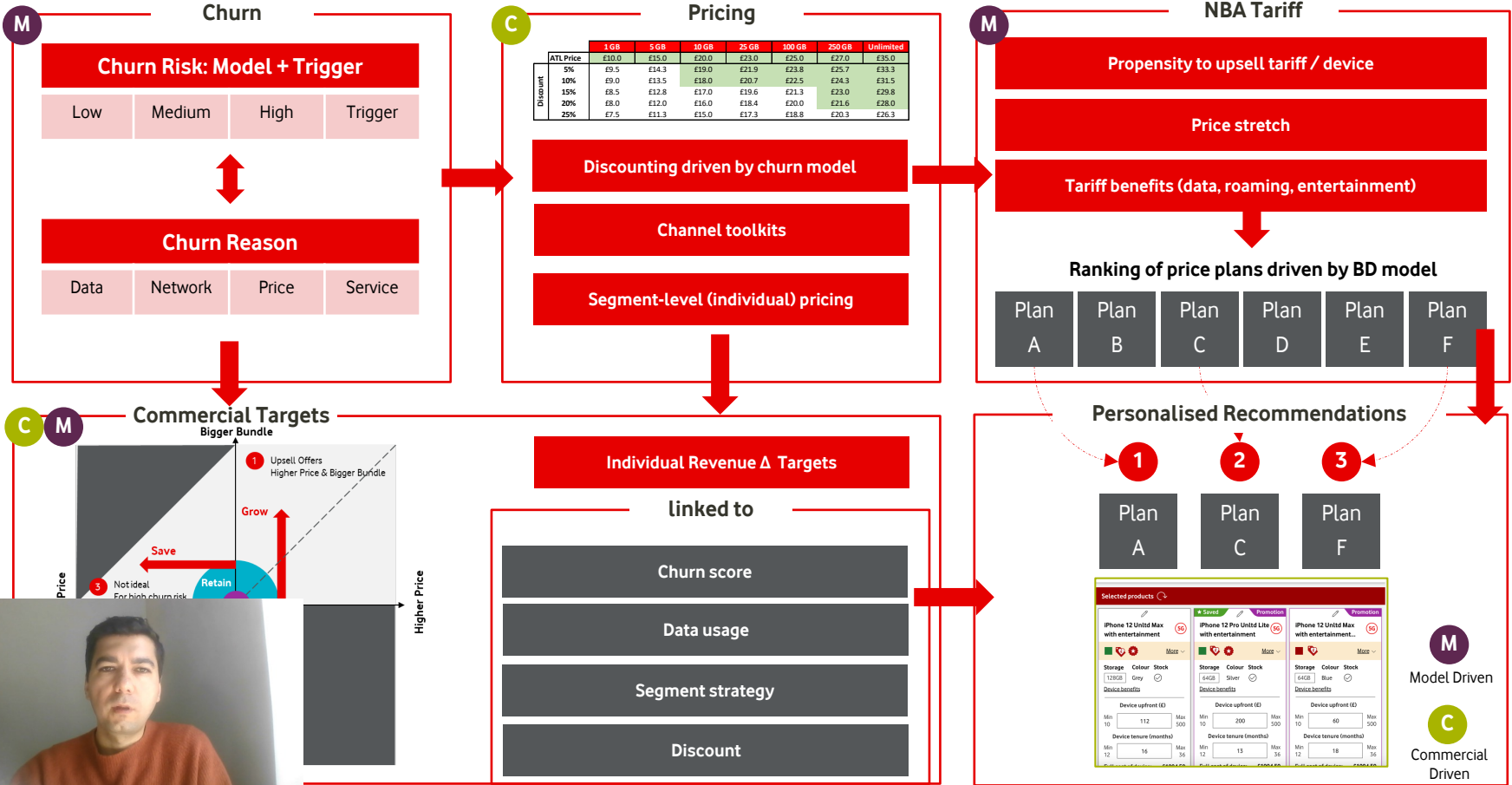
# Offering Customer Personalised Bundles driven by value



- Customers current state
- 1** Upsell offers  
Higher price & bigger bundle
- 2** Smaller bundles  
Lower net MAF
- 3** Bigger bundles  
Lower net MAF



# Big Data Models and Financial / Commercial Controls Drive Recommendations







# The Experience

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# A Unified Experience Across all Channels

Understand my needs

Guide me but let me retain control

Be proactive and timely

Be relevant without being creepy (by knowing too much)



**1 Preparation**  
Prime and ready the customer for their handset upgrade, peak their interest about a potential device they might be interested in based on AOM data

**2 Recommend**  
Allow the customer to assess and compare their recommended plans with their current plans (both device and airtime plan)

**3 Negotiate**  
Allow customers to have control over the recommendation rationale if they are not happy with the top AOM recommendation

**4 Upsell/Cross-Sell**  
Use AOM to recommend 1-2 useful addons for customers

## Contact Centre (desktop) + Retail (tablet)

Customer: Joe Bloggs | 44780000000 | Airtime end date: 10/10/2021 | Upgrade today fee: £87.00

**Average usage over 3m**

Month	Data	Roaming mins	Int. mins
Jan 2021	7.3GB	542	10
Feb 2021	3.5GB	193	23

**Total monthly allowance**

SGB	UNL	UNL	60	300
Jan 2021	7.3GB	542	10	42
Feb 2021	3.5GB	193	23	16

**Usage** | Entertainment

**Refine by**

Manufacturer: [Dropdown] | Model: [Dropdown] | Airtime tenure: [Dropdown] | Device cost: [Dropdown]

SIMO  5G Ready  Unlimited  Entertainment  Nearly new

**Existing products**

- iPhone 11 Unltd with entertainment (50)

**Selected products**

Product	Storage	Colour	Stock	Device upfront (€)	Device tenure (months)
iPhone 12 Unltd Max with entertainment (50)	128GB	Grey	✓	112	10-500
iPhone 12 Pro Unltd Lite with entertainment (50)	64GB	Silver	✓	200	10-500
iPhone 12 Unltd Max with entertainment... (50)	64GB	Blue	✓	60	10-500

## Web

Upgrade your SIM only plan to Pay Monthly and order the iPhone 12 today

Meet your new phone and plan

Apple iPhone 12 + Unlimited (Pay Monthly) = Pay only £34 per month

Includes: 5G ready at no extra cost, Unlimited 5G data, Unlimited minutes and texts

Your SIM only plan and phone: iPhone 11 32GB + Unlimited (Pay Monthly) = Pay only £28 per month

Includes: 5G ready at no extra cost, Unlimited data, Unlimited minutes and texts

## Mobile

Meet your new phone and plan

Interested in our best value Samsung?

Samsung Galaxy A12

- 6.5" display
- 48MP camera
- 5,000mAh battery

Would you like to have more data?

Red 30Gb

Includes: 5G ready at no extra cost, Unlimited Minutes & Texts



# An Assisted Experience

## A move away from product first to customer first

Preparation

Recommend

Negotiate

Upsell/Cross-Sell

- Understand my needs
- Guide me but let me retain control
- Be proactive and timely
- Be relevant without being creepy (by knowing too much)

*Illustrative Only*

Description	Monthly Cost	Cost To Waiver
9 months 3 GBP off line rental	0.00	0.00

Account Total: 31.00 0.00

Customer: **Joe Bloggs** 2 | ID: **447800000000** | Airtime end date: **10/10/2021** 1  
 Upgrade today fee: **£87.00** 1 Basket

**Average usage over 3m**

Category	Usage	Month	Data	Mins	Texts	Roaming m...	Int. mins
Data	4.3 GB	Jan	7.3GB	542	10	42	32
Roaming mins	321	Feb 2021	3.5GB	193	23	16	71
Int mins	213						

**Usage** **Entertainment** Profile & Usage

**Refine by**

Manufacturer  Model  Airtime tenure  Device cost  Clear selection Refine

SIMO  5G Ready  Unlimited  Entertainment  Nearly new

**Existing products** 1

- iPhone 11 Unltd with entertainment 5G
- Device upfront: **£30.00**

**Selected products** 3

- Top Recco**  
 iPhone 12 Unltd Max with entertainment 5G  
 Storage: 128GB, Colour: Grey, Stock:   
 Device benefits:      
 Device upfront (€): Min 10, Max 500, Value: 112  
 Device tenure (months): Min 12, Max 36, Value: 16
- Recommendation Detail**  
 iPhone 12 Pro Unltd Lite with entertainment 5G  
 Storage: 64GB, Colour: Silver, Stock:   
 Device benefits:      
 Device upfront (€): Min 10, Max 500, Value: 200  
 Device tenure (months): Min 12, Max 36, Value: 36
- iPhone 12 Unltd with entertainment...  
 Based on customer preference  
 To get original recommendations, click refresh icon by 'Recommended Packages'  
**OneNumber Bundle**  
 Enables VF Together Discount £3 - VFC 123456  
**Manager's special**  
 A personal, commercial recommendation for the customer

**All Recco are net positive**

Customer Preferences

Recommendation Detail

All Recco are net positive

# An Assisted Experience

Preparation

Recommend

Negotiate

Addons

Profile &amp; Usage

Customer **Joe Bloggs** 2 **447822938481** Airtime end date: **10/10/2021** 1  
 Upgrade today fee: **£87.00** 1

## Average usage over 3m

Data **4.3 GB** Roaming mins **321** Int mins **213**

Month Data Mins Texts Roaming m... Int. mins

Total monthly allowance 5GB UNL UNL 60 300

Jan 2021 **7.3GB** 542 10 42 32

Feb 2021 3.5GB 193 23 16 **71**

Usage

Entertainment

Refine by

Manufacturer  Model  Airtime tenure  Device cost

Clear selection

SIMO  5G Ready  Unlimited  Entertainment  Nearly new

Existing products 1

iPhone 11 Unltd with entertainment 5G

Selected products 2

iPhone 12 Unltd Max with entertainment 5G

iPhone 12 Pro Unltd Lite with entertainment 5G

iPhone 12 Unltd Max with entertainment 5G

Selected basket

iPhone 12 Unltd Max with entertainment

Based on customer preference

To get original recommendations, click refresh icon by 'Recommended Packages'

**Vodafone Together**  
Enables VF Together Discount £3 - VFC 123456

**Manager's special**  
A personal, commercial recommendation for

Customer Profile

Joe Bloggs

Primary Address  
32 Treewood Lane  
Bristol  
BS1 2UD

Primary Phone  
447827938481  
Primary Email  
Bigjoe@hotmail.com

Background information

**STAC code requested**  
[More info](#)

**Customer eligible for a regulatory tariff, see tariff tab in edit panel**

Account open lines

VT	Product	More info	Price (inc. VAT)	Discount	Early upgrade cost	Airtime end date
	FIXED LINE - 44117262718 - Identifier VFC 123456 Anytime calls for Unlimited customers		£10.33	£0	£100	21/09/2024 142 days
	PAYM AIRTIME - 447827938481 Unlimited Max with Entertainment		£20.00	£5	£0	21/09/2023 Upgrade now
	MBB - 447827938481 iPad Pro 12.9 (3rd Gen)	<b>Device plan</b>	£15.01	£0	£15	02/05/2022 15 days

Edit

Device Tariff Add ons Discounts Insurance Accessories Bars

Model	C...	Man...	Spe...	Stor...	Co...	Device...	Stock L...
<input checked="" type="radio"/> iPhone 12		56...	Apple	5G	128GB	Yellow	£1004.34 <input type="button" value="Check"/>
<input type="radio"/> iPhone 11		35...	Apple	4G	64GB	Black	£1234.23 <input type="button" value="Check"/>
<input type="radio"/> iPhone 12 Pro		78...	Apple	5G	256GB	Blue	£1292.23 <input type="button" value="Check"/>
<input type="radio"/> iPhone 12 Mini		23...	Apple	5G	64GB	Grey	£999.23 <input type="button" value="Check"/>
<input type="radio"/> iPhone 12 Mini		23...	Apple	5G	64GB	Blue	£989.01 <input type="button" value="Check"/>
<input type="radio"/> iPhone X		23...	Apple	5G	64GB	Blue	£969.78 <input type="button" value="Check"/>
<input type="radio"/>		23...	Apple	5G	64GB	Blue	£969.78 <input type="button" value="Check"/>

Refine the Recommendation

# An Assisted Experience

Customer **Joe Bloggs** | 44780000000 | Airtime end date: 10/10/2021 | Upgrade today fee: £87.00

**Average usage over 3m**

Month	Data	Roaming mins	Int mins
Jan 2021	4.3 GB	321	213

Usage: Entertainment

Refine by: Manufacturer, Model, Airtime tenure, Device cost

SIMO  5G Ready  Unlimited  Entertainment  Nearly new

**Existing products**

- iPhone 11 Unltd with entertainment

**Selected products**

Product	Storage	Colour	Stock	Device upfront (£)	Device tenure (months)
iPhone 12 Unltd Max with entertainment	128GB	Grey	✓	112	16
iPhone 12 Pro Unltd Lite with entertainment	64GB	Silver	✓	200	13
iPhone 12 Unltd Max with entertainment...	64GB	Blue	✓	60	18

42W Power adapter £19.00 | Early upgrade fee £87.00

Summary: TNR: £230.989 | £119 upfront | £102 per month

**Basket summary**

New upgrade - 447733456784

**Device**

- iPhone 12 Pro, Space Grey | 64GB, Device tenure: 24 months

**Airtime Xtra Plan**

- Unlimited Max with Entertainment, Airtime tenure: 12 months

**Add ons and extras**

- Promo - International 100 | 0800 numbers
- Discount: 15% off plan
- Insurance: AppleCare plus theft.
- Fees: Early upgrade fee
- Accessories: 42W Power adapter

**Airtime plan benefits**

- Xtra Plan with 2 Xtra Benefits
- Unlimited MMS, Device care, Watch
- Unlimited Data Booster, 81 Roam Free destinations (Global Roaming Plus)
- Included in airtime plan.

**Device benefits**

**Vodafone together discounts**

INSURANCE NOT SELECTED | Add insurance

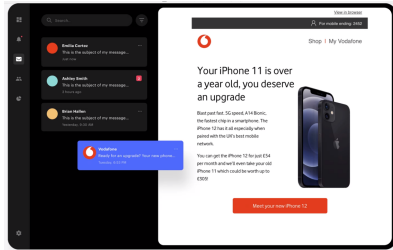
Relevant Next Best Action | Single Click Fulfilment

For agent only | Total device cost: £1000 | Total Upfront: £177.82 | Total Monthly: £71.00

Continue

# A Recommendation Driven Digital Experience

- The new experience is AOM recommendation driven outbound comms to customer to kick-off upgrades journey
- Powered by big data models, pega ML and commercial controls



Upgrade Add Another Plan To Your Account

Upgrade your SIM only plan to Pay Monthly and order the iPhone 12 today

Meet your new phone and plan *Reasons why*

*Top Bundle*

<b>Unlimited Max</b> Data: <b>Unlimited</b> Minutes & Text: <b>Unlimited</b> Includes: 5G ready at no extra cost (Speed & capacity limited)	<b>Pay only</b> <b>£54 per month</b> Includes: • iPhone 12 64GB • Unlimited 5G data • Unlimited minutes and texts
--	--

*Personalised Discounts*

Your SIM only plan and phone:

It looks like you are using an **Apple iPhone 11**  
How do we know that?

<b>Unlimited</b> Data: <b>Unlimited</b> Minutes & Text: <b>Unlimited</b> Includes: Speed Maximum download of 10Mbps	Your price <b>£28 per month</b> Includes: • iPhone 11 32GB • Unlimited data • Unlimited minutes and texts
--	--

*Showing that we know you*

Just need a SIM?

Keep your current device and get a great new SIM only plan that is perfect for you.

See all SIM only plans

Get the phone you want, at the price you choose  
Please take a contract, upload docs, and upgrade on Vodafone UK

Your current phone: **Apple iPhone XS Max** £53 per month

Your recommendation: **Apple iPhone 12 Pro Max** £49 per month (was £29)

*Trade in*

The best phones for taking quality photos

<b>Claim AirPods worth £75</b> <b>Apple iPhone 12</b> Price: £50 per month Upgrade: £29	<b>Google Pixel 5G</b> Price: £51 per month Upgrade: £29	<b>Save £10pm</b> <b>Samsung Galaxy S20+ 5G</b> Price: £55 per month Upgrade: £29
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Do you fancy something smaller?

<b>Apple iPhone SE</b> Price: £29 per month Upgrade: £34	<b>Apple iPhone XR</b> Price: £30 per month Upgrade: £29	<b>Claim AirPods worth £75</b> <b>Apple iPhone 12</b> Price: £50 per month Upgrade: £29
--	--	--

Other 5G available phones

<b>Samsung Galaxy A51 5G</b> Price: £34 per month Upgrade: £29	<b>OPPO Reno4 Pro 5G</b> Price: £51 per month Upgrade: £29	<b>Samsung Galaxy S21+ 5G</b> Price: £55 per month Upgrade: £29
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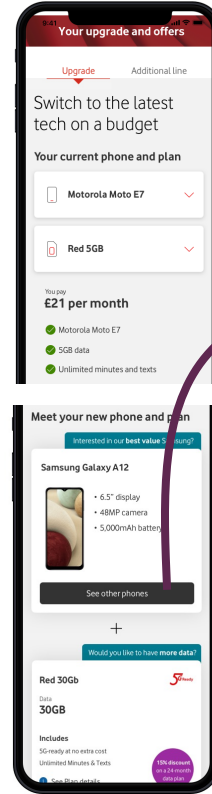
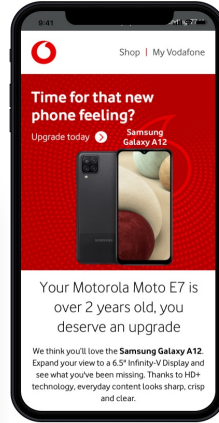
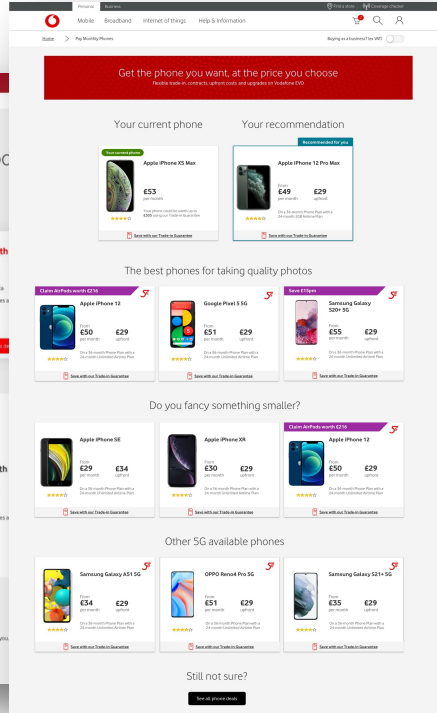
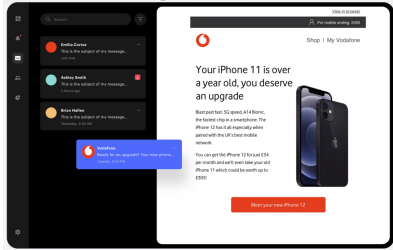
Still not sure?  
See all phone deals

*AOM driven categories*

*Promotions*

*Adaptive will drive best handsets*

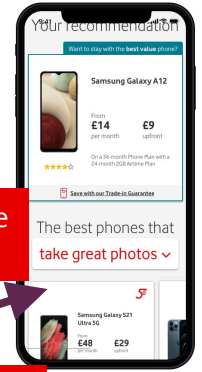
# An Experience across all Digital Touchpoints



See More Phones

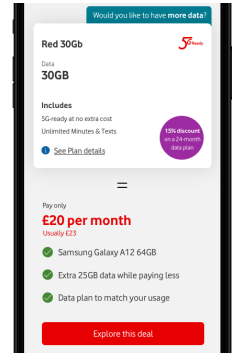
Main reasons why

Top categories Top Phones



The best phones that take great photos are bigger in size are blazing fast have great battery

Top 3 reasons







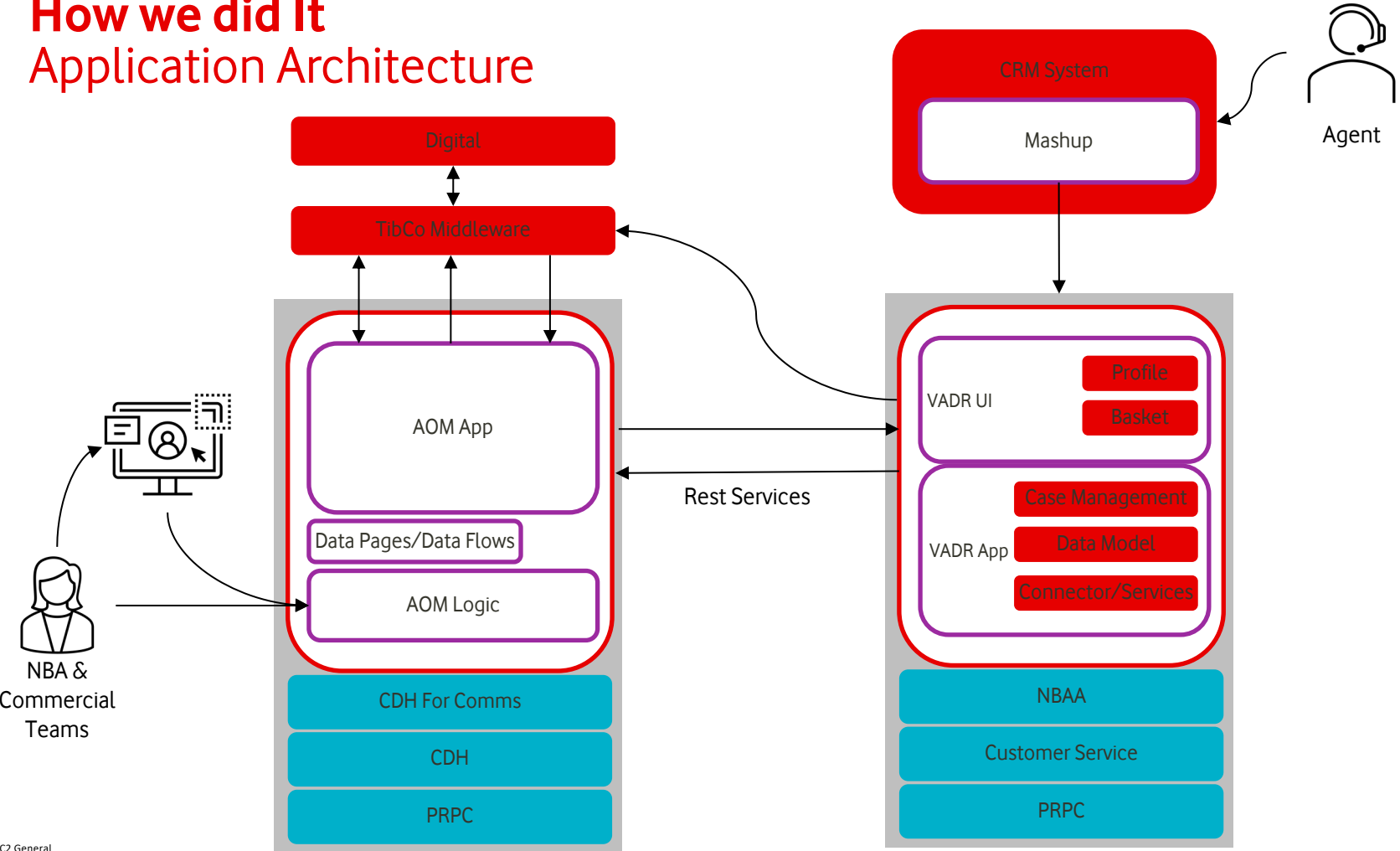
# The Technology Backbone

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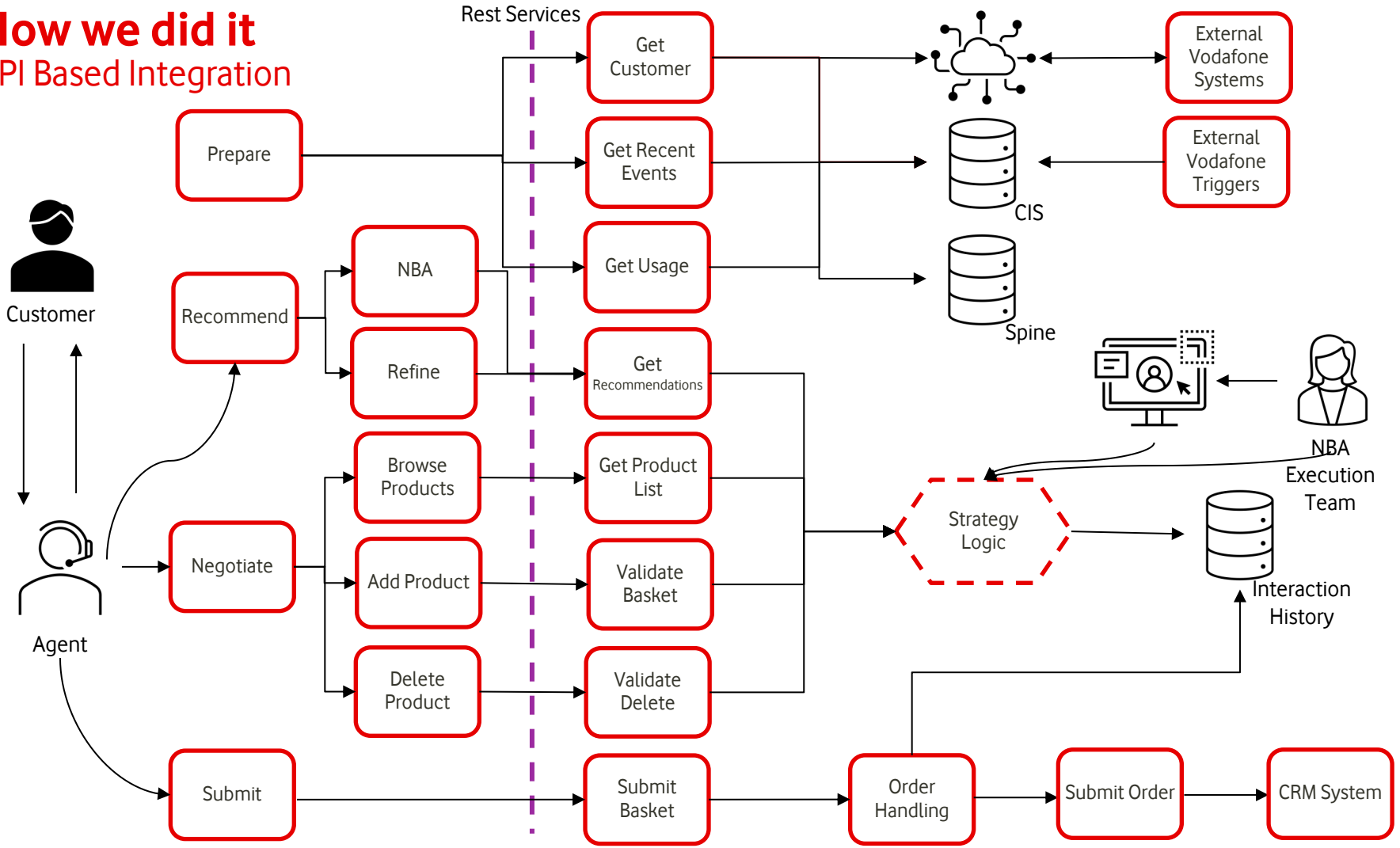
# How we did It

## Application Architecture



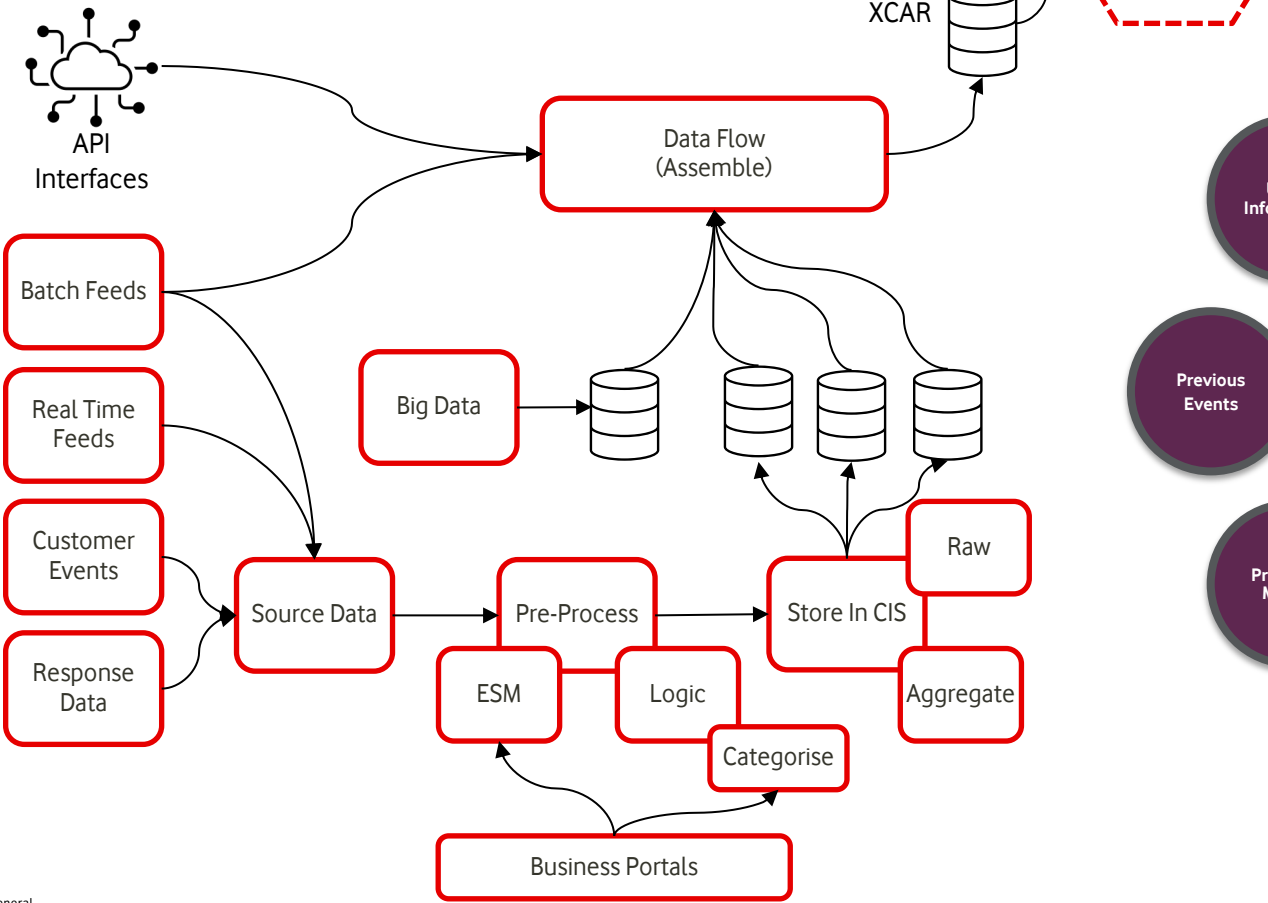
# How we did it

## API Based Integration



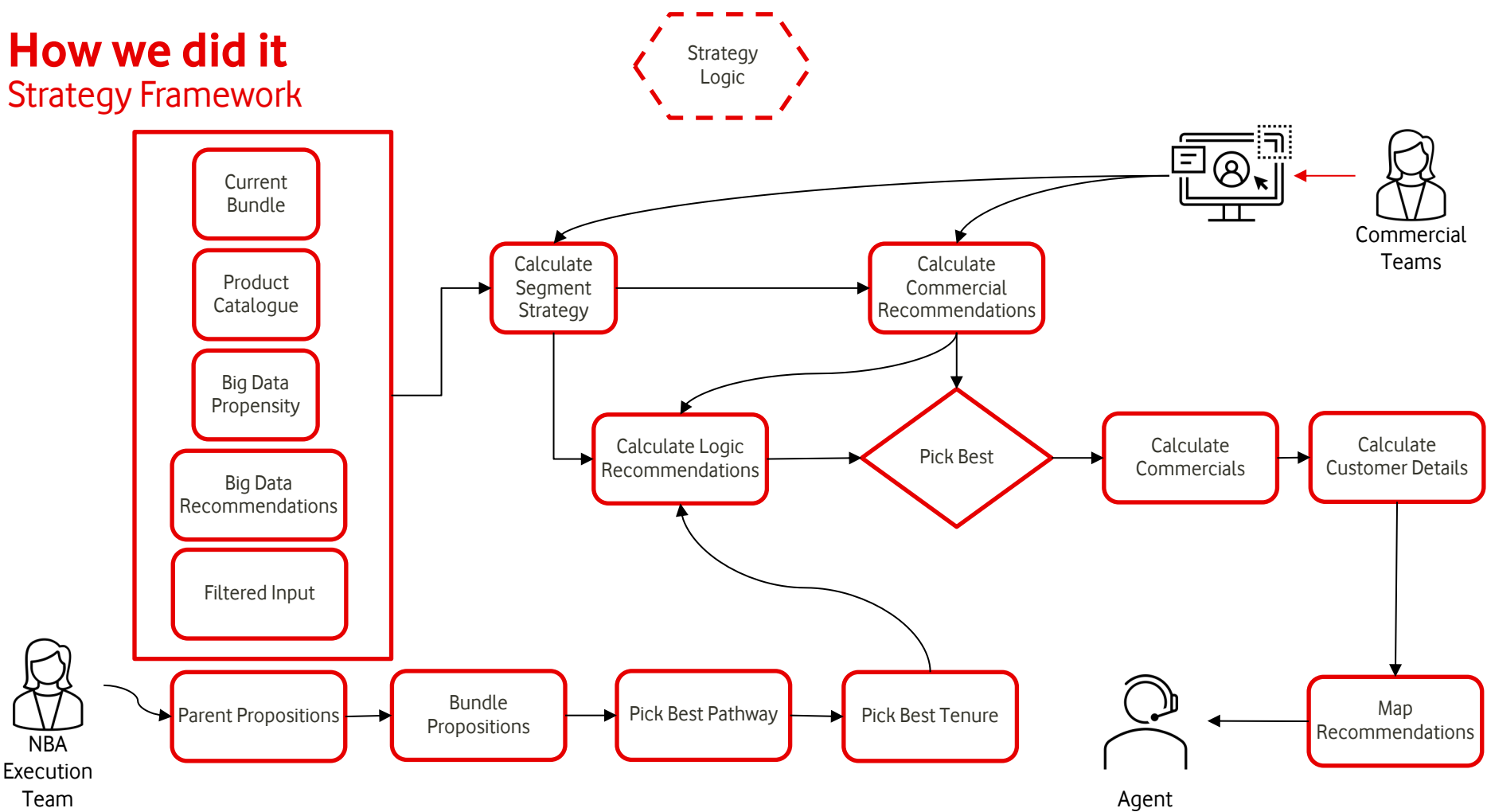
# How we did It

## Customer Definition & Preparation



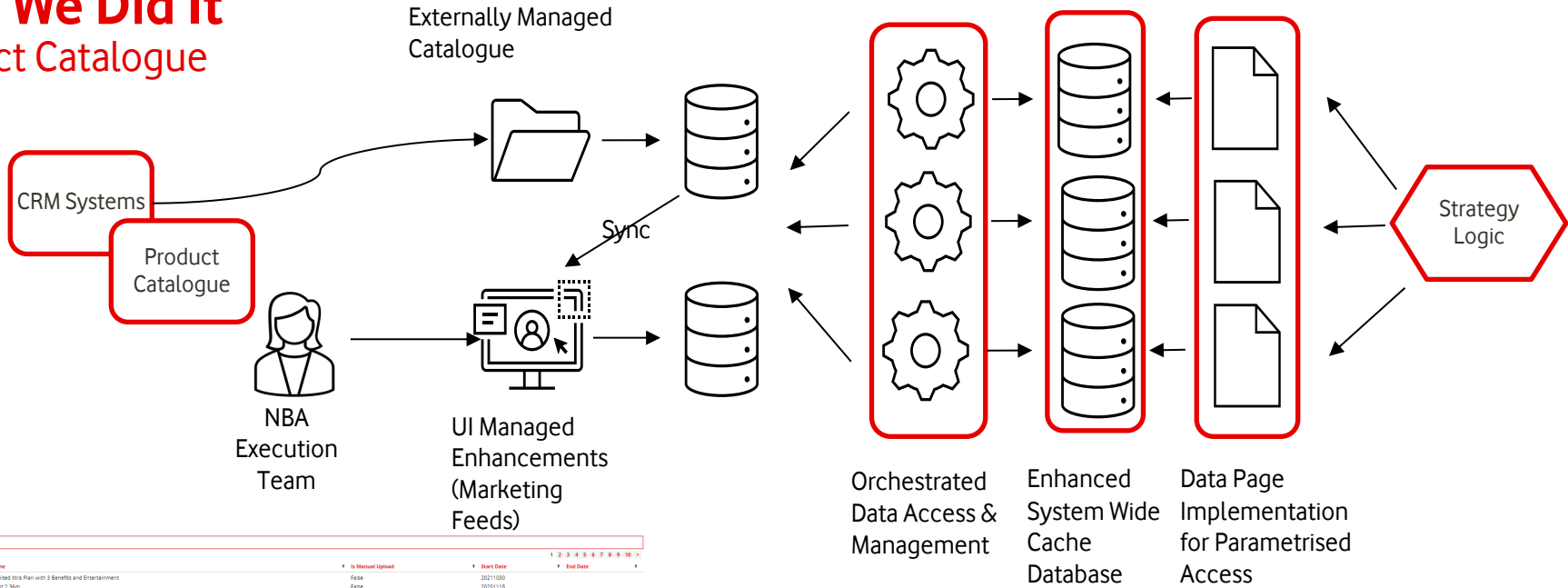
# How we did it

## Strategy Framework



# How We Did It

## Product Catalogue



Product ID	Product Name	Manual Upload	Start Date	End Date
112124	24mrx Unlimited Nova Plan with 3 Benefits and Entertainment	False	20211000	
112738	Bus Superfast 2 36m	False	20201118	
114396	24m 12GB Nova Plan with 4 Benefits and Entertainment	False	20210910	
113772	36mrx Nova Bus Superfast Business Plan 12GB	False	20210900	
115819	24 mrx Band 2 Tablet Red Plan 12GB	False	20210900	
114456	36mrx Nova Bus Superfast Plan 1GB	False	20201029	
113884	24 mrx Band 2 Unlimited Plan	False	20201005	
116040	24mrx 12GB Nova Plan with 3 Benefits	False	20211000	
113717	24 Month Nova Plan with Entertainment Plan 1GB	False	20201010	
116048	24m 12GB Nova Plan with 3 Benefits and Entertainment	False	20211000	

Attribute Name	Attribute Value
TarifTagname	EBU
TarifDuration	36
TarifData	0
SMOOnly	N
ProductClass	BASIC

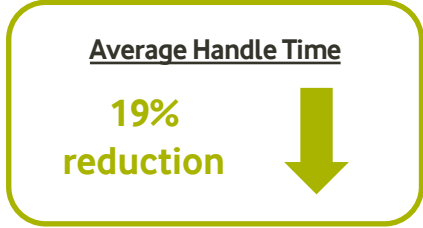
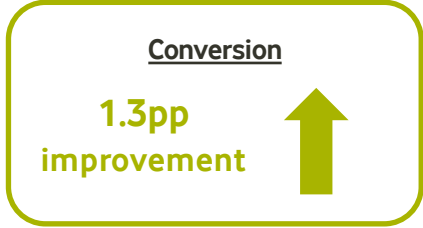
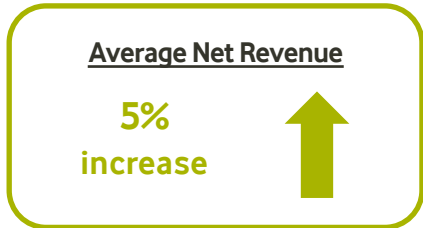
Product Attributes
Name
ISFixed
PriorityDeviceMultiplier
Technology
IsCableOnly
SMOUpgradeBusinessPriority



# Results

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# AOM Fully Rolled Out Across All Telesales Sites





# Takeaways and Considerations



**Performance**

**Customer  
Centric**

**Continual  
Improvement**



**Are we finished?**

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# The Short Answer is No!





**Any Questions?**