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 and 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-to-day activities required to support the scrum team
1:1 Operations Manager
Executive Agile ceremonies, unblock issues and manage deployment into the production environment
1:1 Customer Engagement

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 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

**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.
1:1 Customer Engagement

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
- Determine 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

<table>
<thead>
<tr>
<th>NBA Analyst</th>
<th>Data Scientist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyze action versus business outcomes</td>
<td>Setup and maintain predictions</td>
</tr>
<tr>
<td>1:1 Operations Manager</td>
<td>Prediction Studio</td>
</tr>
<tr>
<td>Work together on reports and optimizes accept rate</td>
<td>Work together on optimizing prediction vs decisioning</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>System Architect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup and maintain Pega platform</td>
</tr>
<tr>
<td>Dev Studio</td>
</tr>
<tr>
<td>Help decision architect access data</td>
</tr>
</tbody>
</table>
1:1 Customer Engagement

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 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 request into well-specified requirements for Next-Best-Actions.

**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
1:1 Customer Engagement

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 substantiate 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 production 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 conversions 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

**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

**Data Scientist/ Analyst**

Design, maintain, deploy, and refresh the predictive analytics assets

Prediction Studio

Provide input on the Next-Best-Action framework and map enterprise data to attributes within it

**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

**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
1:1 Customer Engagement

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

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 Analyst
Get ideas to market quickly
1:1 Operations Manager
Assist with formalizing /document requests and getting ideas to market quickly

QA Testers
Manage testing process, ensuring changes meet the expected outcome
1:1 Operations Manager, Customer Decision Hub
1:1 Customer Engagement

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
1:1 Customer Engagement

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 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
Account Users

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

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

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

*“Responsible for cloud support activities”*
Account Users

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
Development Users

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
**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
- Kibana [log analyzer]
- DevStudio

Main stakeholders

Developers

Builds customer applications
Any Team
Works collaboratively to develop the applications
Development Users

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

Product Architect
Plans the product for scalability
Any Team
Works with him to plan the implementation approach

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

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

Scrum Master
Plans the development
Any Team
Works with scrum master for development plan

Accountable, security, compliances, legal audit

Owner of overall application

Owner of the application"
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

“Facilitate 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 product architect to plan the implementation approach
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 Questionnaire
- Pega Customer Service
- Customer Decision Hub
- Phone / Fax
- Spreadsheet applications

Main stakeholders

<table>
<thead>
<tr>
<th>CM Navigator</th>
<th>CM Nurse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaborates to support patients</td>
<td>Caring for and informing patients</td>
</tr>
<tr>
<td>Pega Care Management</td>
<td>Pega Care Management</td>
</tr>
<tr>
<td>Coordinators work with navigators to ensure patients are supported throughout their journey</td>
<td>Nurses work with coordinator to ensure their work is organized and efficient</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manager/Director</th>
<th>Supervisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring department excellence</td>
<td>Oversees administrative work</td>
</tr>
<tr>
<td>Pega Care Management</td>
<td>Pega Care Management</td>
</tr>
<tr>
<td>Managers/Directors coordinate staff in order to achieve organizational goals across departments</td>
<td>Supervisors ensure that Coordinators have the resources needed to provide administrative support</td>
</tr>
</tbody>
</table>
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 work with coordinator to ensure they have administrative resources needed to provide care

Manager/Director
- Ensuring department excellence
- Pega Care Management
  Managers/Directors coordinate staff in order to achieve organizational goals across departments

CM Nurse
- Caring for and informing patients
- Pega Care Management
  Nurses work with Navigator to ensure their patients receive the care and education they need

Supervisor
- Oversees administrative work
- Pega Care Management
  Supervisors ensure that Navigators have the resources needed to provide patient support
# Care Management

## Nurse

“\textit{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

<table>
<thead>
<tr>
<th>CM Coordinator</th>
<th>Collaborates to support patients</th>
<th>Pega Care Management</th>
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<tbody>
<tr>
<td></td>
<td>Nurses work with coordinators to ensure patients are supported throughout their journey</td>
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<tr>
<td></td>
<td>Navigators work with nurses to ensure patients are supported throughout their journey</td>
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<tr>
<th>Supervisor</th>
<th>Oversees patient care</th>
<th>Pega Care Management</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Supervisors ensure that nurses have the resources needed to provide patient support</td>
<td></td>
</tr>
</tbody>
</table>
**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 case 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 staff receive 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 receive the best care
Utilization Management

Coordinator

“I make sure the health plan workers have all the resources and support required to complete their work efficiently”

Goals

- Support utilization management activities by taking on tasks that can be conducted by non-clinical personnel
- 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 efficient

**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 guidelines
- 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 receive proper administrative support

**UM Nurse**
Performing clinical reviews and processing requests
Pega Care Management
Supervisors oversee nursing staff to guarantee patients/members receive 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
Manager/Director

“\textit{I ensure that my staff of clinical and administrative workers have the resources they need to adhere to regulations and meet our organizational objectives}”

\section*{Goals}

\begin{itemize}
  \item Departmental and organizational excellence
  \item Interdepartmental communication and transparency
  \item Reporting to organization executives
  \item Overseeing staff case load
  \item Managing staff deadlines
  \item Escalation management and mitigation
  \item Designing NBA items
\end{itemize}

\section*{Key drivers}

\begin{itemize}
  \item KPI of administrative staff
  \item Clinical staff KPI
  \item Percent towards maximum case load
  \item SLA completion
\end{itemize}

\section*{Tools}

\begin{itemize}
  \item Pega Care Management
  \item Clinical information e.g. EHR
  \item Pega Questionaire
  \item Pega Customer Service
  \item Customer Decision Hub
  \item Phone / Fax
  \item Spreadsheet applications
\end{itemize}

\section*{Main stakeholders}

\begin{itemize}
  \item **CM Navigator**
    \begin{itemize}
      \item Collaborates to support patients
      \item Pega Care Management
      \item Managers/Directors oversee navigators and manage case load to ensure patients receive needed care
    \end{itemize}

  \item **CM Coordinator**
    \begin{itemize}
      \item Collaborates to support patients
      \item Pega Care Management
      \item Managers/Directors work with coordinators to ensure all staff receive proper administrative support
    \end{itemize}

  \item **CM Nurse**
    \begin{itemize}
      \item Caring for and informing patients
      \item Pega Care Management
      \item Managers/Directors oversee nursing staff performance and resource delegation
    \end{itemize}

  \item **Supervisor**
    \begin{itemize}
      \item Oversees administrative work
      \item Pega Care Management
      \item Managers/Directors work with supervisors to make sure their staff have proper resources to complete and manage case load
    \end{itemize}
\end{itemize}
The business analyst works closely with the business operational manager to successfully bring applications to market.

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

Pega Government Platform
Manage team workload and case escalation
Supervisor

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

Pega Government Platform
Request services or information
Constituent

Main stakeholders

**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

**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.

**Case Worker**

“I want to diligently review each case and its nuances in order to determine the best next action for the case.”
The intake officer interacts directly with the constituent to gather information for a case.

**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.

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

**Case Worker**

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

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

**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.
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 needed for 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 Government 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.
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.
Financial Services - Customer Service

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
The CSR works alongside peers in order to improve workflows and educate on best practices.

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

**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 tools
- Troubleshooting tools
- Web search
- Workforce management + collaboration tools

**Main stakeholders**

<table>
<thead>
<tr>
<th>CSR Manager</th>
<th>Help to guide and manage CSRs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pega Customer Service</td>
<td></td>
</tr>
<tr>
<td>The CSR reports directly to the CSR Manager</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CSR</th>
<th>Offer peer to peer advice and guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pega Customer Service</td>
<td></td>
</tr>
<tr>
<td>The CSR works tangentially with retention specialists, giving insight that can aid in keeping customers satisfied</td>
<td></td>
</tr>
</tbody>
</table>

"I help retain customers that are at a higher risk for cancelling service"
Communications - Customer Service

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
CSR

“I help members in need of help to ensure they are receiving 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
The CSR works with CSR specialist workers in order to ensure customers receive the appropriate support.

CSR Specialist

The CSR works with CSR specialist workers in order to ensure customers receive the appropriate support.

Goals

- Assist customers with their problems, issues, and/or questions
- 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 receive the appropriate support.

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

Insurance - Customer Service
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**

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead system architect</td>
<td>Lead the development, App studio, Dev Studio, Discusses acceptance criteria, validates user story</td>
</tr>
<tr>
<td>Executive</td>
<td>Provide strong support and governance, Collaborates with executives to agree on scope</td>
</tr>
<tr>
<td>Product Owner (Client)</td>
<td>Owns desired outcome, Collaborate to agree on scope, manage product backlog</td>
</tr>
<tr>
<td>QA</td>
<td>Check application quality, App Studio, Ensure intended business outcome is met</td>
</tr>
</tbody>
</table>
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
• Create proof of concepts with customer data to demonstrate solution with actual client data
• Follow development guidelines and best practices
• Reduce complexity of new developments, as much as possible

Key drivers

• Feedback from Solution Consultant, Account Executive, and Client

Tools

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

Main stakeholders

<table>
<thead>
<tr>
<th>Solution consultant</th>
<th>Front-end UI team</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Educate client about product capabilities</strong></td>
<td><strong>Lend UI expertise</strong></td>
</tr>
<tr>
<td>App Studio, Dev studio</td>
<td>Dev studio</td>
</tr>
<tr>
<td>Collaborate on building client demo</td>
<td>Refine UI implementation in demos</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Demo excellence team</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Produce demo assets</strong></td>
</tr>
<tr>
<td>App Studio, Dev Studio</td>
</tr>
<tr>
<td>Build basic demos as starting points for solutions</td>
</tr>
</tbody>
</table>
Sales

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

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Key Drivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account executive</td>
<td>Close the deal, Sales Automation, Guide client through sales cycle</td>
</tr>
<tr>
<td>Demo excellence team</td>
<td>Produce demo assets, App Studio, Dev Studio, Build basic demos as starting points for solutions</td>
</tr>
<tr>
<td>Client champion</td>
<td>Understand value of Pega, Relay value to key decision makers</td>
</tr>
<tr>
<td>Sales engineer</td>
<td>Demostrate client solution, Agile Studio, Create customized demos based on client needs</td>
</tr>
</tbody>
</table>
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
- Cloud 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

Product Leader
Reviews product goals
App Factory
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
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
- Office 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

**Manager**
Manages the Citizen Developer
Any Team
Citizen Developer provides status updates to manager and aligns on backlog

**App Factory Admin**
Ensures uninterrupted access to App Factory
App Factory
Assists Citizen Developer in resolving build failures

**Office 365**
For documentation and development support

**App Factory**
Interact with end users using pulse and spaces on App Factory

**Dev Studio**
To carry out advanced development activities such as data model manipulation

**App Studio**
To carry out initial development activities.

**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
- Office 365 - For documentation and development support
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

App Studio Product Owner

Owns product vision
App Studio
Mentor provides feedback on experiences that citizen developers find difficult to use

Pega Employees

Use the apps to automate tasks
Any Team
Mentor ensures quality apps are delivered

App Studio Engineering Manager

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

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Design.Pega.com
Client Support - Global Client Support (GCS)

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 success & 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

**Engineering Manager**

*Manages feature development*

Cloud Engineering

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

**Product Owner**

*Owns product vision*

Cloud Engineering/Global Operations Console

Cloud engineer routes feedback from clients to influence feature prioritization

**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

**Technical Account Manager**

- Manages feature development
- Any Team
- Support engineer follows up with them to get SE items prioritized

**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

**Client Support - Global Client Support (GCS)**
Cloud Engineer

“I want to develop applications 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, dependencies, 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
- IntelliJ - Code Editor
- Docker - To create and deliver installation image and containers to run code

Main stakeholders

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scrum Master</td>
<td>Monitors spring delivery&lt;br&gt;Cloud Engineering&lt;br&gt;Cloud engineer provides the Scrum Master daily updates and discusses blocker</td>
</tr>
<tr>
<td>Product Owner</td>
<td>Owns product vision&lt;br&gt;Cloud Engineering&lt;br&gt;Cloud engineer reaches out for clarification on app behaviour</td>
</tr>
<tr>
<td>Engineering Manager</td>
<td>Manages feature development&lt;br&gt;Platform Engineering Teams&lt;br&gt;Cloud engineer coordinates with engineering manager to clear interdependencies and report platform bugs</td>
</tr>
<tr>
<td>SRT Cloud Engineer</td>
<td>Provisions cloud environments&lt;br&gt;Service Reliability Team&lt;br&gt;Cloud engineer coordinates with them to take feedback on the tooling and provide support on client issues</td>
</tr>
</tbody>
</table>
Research & Development (R&D)

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

**Consuming Team Product Owner**

Owns Product vision
Any Team
Product Owner showcases platform features and takes early feedback to modify product offering

**Tribe/Alliance Leader**

Owns a major product area
Any Team
Product Owner interacts with Tribe/Alliance Leader to provide updates and discuss blockers

**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

**Test Architect**

- **Leads cross-team quality practices**
- Quality Assurance
  - QA Engineer reaches out for guidance whenever required

**Product Owner**

- **Owns a major product area**
- Any Team
  - QA Engineer discusses requirement with the Product Owner

**Engineering Manager**

- **Manages feature development**
- Any Team
  - QA Engineer discusses requirement and test reviews
Research & Development (R&D)

Release Manager

“I want to plan for current and future releases by facilitating collaboration between technical 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
- Facilitates Release Escalation Meetings to discuss progress on release milestones and assess 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 discussion between tribe leaders & executives to define release goal

**Product Executive**

- Own all Pega Products Executives
- Release Manager facilitates release escalation meetings during development to assess risks and discuss release trend

**Platform Engineering Leaders**

- Responsible for product development
- Any Team
- Release manager reached out to communicate on code packaging and build creation
## 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 service requests (SR) and sustaining engineering items (SE)

### Key drivers

- Epic cycle time & Epic reaction time
- Epic commitment 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

<table>
<thead>
<tr>
<th>Role</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platform Engineer</td>
<td>Develops features, checks in with engineers for development status and resolving obstacles</td>
</tr>
<tr>
<td>Any Team</td>
<td></td>
</tr>
<tr>
<td>UX Designer</td>
<td>Designs experiences, checks in with UX Designer to receive the designs and facilitates alignment on feasibility</td>
</tr>
<tr>
<td>Platform UX</td>
<td></td>
</tr>
<tr>
<td>Product Owner</td>
<td>Owns product vision, works with product owner to prioritize epics and identify obstacles</td>
</tr>
<tr>
<td>Any Team</td>
<td></td>
</tr>
<tr>
<td>Consuming Team Engineer</td>
<td>Develops features, coordinates with consuming team engineers to resolve dependencies &amp; take feedback on features</td>
</tr>
<tr>
<td>Any Team</td>
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</tr>
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Research & Development (R&D)
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 development
- 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 commitment 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
- IntelliJ 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

<table>
<thead>
<tr>
<th>Product &amp; Engineering Leaders</th>
<th>Product Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owns product vision &amp; delivery</td>
<td>Owns product vision</td>
</tr>
<tr>
<td>Any Team</td>
<td>Any Team</td>
</tr>
<tr>
<td>Software Engineer reaches out to discuss technical design, providing updates or giving sprint demos</td>
<td>Software Engineer discusses requirement and acceptance criteria for user stories</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Consuming Team Engineer</th>
<th>Support Engineers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develops features</td>
<td>Resolves client issues</td>
</tr>
<tr>
<td>Any Team</td>
<td>Global Customer Service</td>
</tr>
<tr>
<td>Software Engineer reaches out to assist in adoption, understand bugs reported by consuming teams or work on interdependent features</td>
<td>Software engineer coordinates with Support Engineers to resolve complex client issues</td>
</tr>
</tbody>
</table>
** 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
- Global Client Support (GCS) Portal - For checking SE items

** Main stakeholders **

<table>
<thead>
<tr>
<th><strong>Alliance Leader</strong></th>
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<tbody>
<tr>
<td>Owns several major product areas</td>
</tr>
<tr>
<td>Any Team</td>
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<td>Tribe Leader coordinates with consuming team engineers to take feedback on adoption of features</td>
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<td>Tribe Leader coordinates with consuming team engineers to take feedback on adoption of features</td>
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<tr>
<th><strong>Account Executive</strong></th>
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</thead>
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<tr>
<td>Responsible for product sales</td>
</tr>
<tr>
<td>Sales</td>
</tr>
<tr>
<td>Product Owner provides them materials and technical guidance to position features for clients</td>
</tr>
</tbody>
</table>
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 & platform engineer exchange feedback on feasibility of designs & UI implementation

**Technical Writer**
Writes Copy & product documentation
Enablement
UX Designer reaches out for guidance on product copy

Rev. 00 06/20
Design.Pega.com
**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

**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

**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

**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

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

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

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

- **Workforce Intelligence**
  - Fielding requests for automations & implementing automations

**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

**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
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

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

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
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

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

“*I want to monitor client environments, so that they have continuous operation*”

**Goals**

- Access client information, 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
**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 information 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 deployed properly, so that everything is running as expected
- Workforce Intelligence
- 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

---

*I want to ensure successful WFI implementation, so that the client gets the most value out of the product*
**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 information 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 Intelligence
Help resolve tickets
**Goals**

- Understand, present, and share entire value of entire application
- Learn the basics of most pages
- Learn how they can 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 Administrator**
I want to get everything set up, so that everyone has a valuable experience with the product

Workforce Intelligence
Get WFI configured

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

Workforce Intelligence
Training & demoing

**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

**Consultant**
I want to help clients set up new WFI implementations, so that they are getting the most out of the product

Workforce Intelligence
Included in sales process

---

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

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

**Business Analyst**

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

- Workforce Intelligence
- Fielding requests for automations & implementing automations

**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

**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