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PEGA CDH

Next Best Action For Contact Centres

MLP Scope

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Objective

Deliver a fully functional MLP that allows delivery of AI driven Next Best Actions into a Cell Centre Agent that works with

- ✅ Real Customer
- ✅ Real Data
- ✅ Real Agents
- ✅ Real Actions (Sales and Service offers)
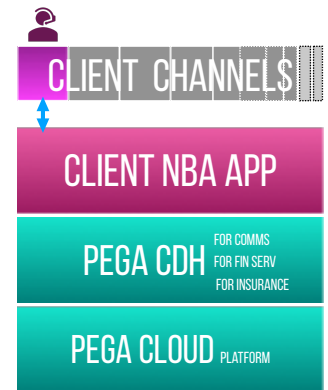
Why Next Best Action For Contact Centre?

Next Best Action For Contact Centres transforms customer interactions by delivering personalised experiences, reducing churn, driving revenue, enabling real-time decision-making, proactive issue resolution, generating valuable insights, and allowing adaptability for continuous improvement. This results in increased customer satisfaction and overall business success.

SOME KEY FEATURES:

1. Personalisation: NBA enables real-time analysis of customer data, allowing agents to provide tailored recommendations and solutions, enhancing customer satisfaction and loyalty.

2. Improved Customer Retention: NBA identifies opportunities to proactively address customer needs, reducing churn by anticipating and resolving issues before they escalate.

3. Increased Cross-Selling and Up-Selling: Agents, armed with insights into customer preferences, can suggest relevant products or services, driving revenue through effective cross-selling and up-selling.

4. Consistent Real-Time Decisions: NBA operates in real-time, empowering agents to make data-driven decisions aligning with communication across touchpoints, crucial for agility in a fast-paced business environment.

5. Proactive Issue Resolution: NBA identifies potential issues based on historical data and customer behaviour, allowing automated resolution or proactive intervention by agents, preventing escalations and enhancing overall satisfaction.

6. Data-Driven Insights: NBA systems generate valuable insights from customer data, informing strategy refinement, improved marketing, and enhanced business intelligence.

7. Adaptability and Continuous Improvement: NBA systems are adaptable, evolving over time to align with changing customer behaviours and business goals, supporting continuous improvement in engagement strategies.

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What do I get?

- The Pega CDH application is hosted on Pegacloud and comes with platform, application and portals pre-built and ready to use
- The NBA for Contact Centre app layer is configured for client specific use based on agreed Actions, Treatments, Business rules, Contact Policy…
- Provide a Get NBA API that allows call from a contact centre application to return agreed number of Next Best Action with supporting payload such as personalised agent scripts including customer data points supporting the recommendation.
- Expose a Response API that allows channels to post customer responses back into CDH so it can record, report and learn (adaptive ML) from the outcomes.
- Pega Academy provides base user training on the configuration of Actions and Rules in CDH, Adqura will additionally provide handover training to client business teams to operate their specific implementation (including how-to and user guides)

CLIENT CHANNELS

CLIENT NBA APP

PEGA CDH FOR COMMS FOR FIN SERV FOR INSURANCE

PEGA CLOUD PLATFORM

How long will it take?

- We propose to deliver the end to end MLP typically in **9 weeks*** followed by a 2 week post go-live support period
- The plan below outlines at a high level, the activities covered in this period
- A detailed schedule of workshops, required attendee profiles, duration, inputs and outputs etc will be provided at the start of the engagement

Inception (1 week)	Delivery (6-8 weeks)	Support (2 weeks)
Business Analysis: • Define Business Goals & KPIs. • Identify 5 MLP Offers. • Capture Rules	**Business Delivery:** • Prepare Action Catalogue • Build rules like Engagement Policy, Contact Policy and Arbitration	**Post Go-Live Support:**
Technical Analysis: • Provide Introduction & CDH Overview. • Conduct tech sessions on Channel Integration & Data Management • High-Level Solution Design. • DevOps and Infra discussions	**Technical Delivery:** • Telecoms Data Model • Build and configure Datasets & AI • Connect NBA Container APIs • Configure Reporting & Simulation • Create users and profiles • DevOps and Infra setup	• Live Support • Reports monitored and handover • System monitoring and handover
Test Analysis: • Plan Test Approach	**Test Setup:** • Create test case and data	

What are the benefits we can expect?

Adqura work closely with clients to help prepare their business cases based other current baseline and typical uplifts we have seen similar customers achieve in domains of Comms and Media, Financial Services, Insurance etc

1. Operational KPIs: Clients typically see improvements in operational KPIs such as
   - NPS (increase), AHT (reduction), First call resolution (increase), Call deflection (e.g. Proactively NBA in IVR channel to allow customers to self serve)
   - For example, A European Telco saw a 19% reduction in AHT while US based Employee manager reported a 80 point uplift in NPS, quoting *"true shift in employee sentiment' from lagging to strong positive score"*
2. Sales KPIs: Clients have had significant increment in marketing/sales KPIs
   - For example: A European Telco saw a 40% revenue growth, while another telco reported EBITDA profits of £75 million+ PA from sales and churn reduction driving EBITDA profits of £43 million PA

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Key Assumptions:

We have assumed the following as part of the proposed scope, cost and delivery timelines. We can discuss any revisions to these as per client specific needs and requests.

1. Integration
   - CDH will only integrate with a Call Centre channel client CRM app in a headless manner i.e. via REST service calls.
   - Inbound channel integration will be delivered using OOTB Container API and it would not be customised as part of MLP scope.
   - All customer responses and relevant information will be provided to CDH via OOTB Capture Response REST API.
   - CDH will not integrate with a content management system (CMS). CMS metadata e.g. image URLs will be entered to CDH Action forms by end-users, this CMS content (e.g. image files) will be hosted on client's servers.

2. Data Model and Data Integrations
   - CDH Telecommunications data model will be used for the scope of MLP and would not get customised.
   - Maximum two (2) data sources will be mapped to CDH part of MLP scope. Those two entities would be Account and Subscriber data sets. The data model can be extended as per client's needs in the following phases.
   - Data required for decisioning (Account & Subscriber level data) will be provided by the client as CSV files (on designated Pegacloud target location). Encryption will not be used as part of MLP scope.
   - Client Product Catalogue integration will not be covered as part of MLP scope. Product details (e.g. tariff duration, price etc.) will be entered on Action/Offer forms.
   - CDH Interaction History will get exported to Pegacloud file repository (e.g. s3 bucket) for clients to fetch from for reporting.

3. Strategy Framework
   - Maximum 5 Actions and 5 Treatments are assumed as part of MLP scope (increasing this **may** impact delivery time).
   - Multi-Level decisioning (Account and Subscription) will be configured as part of MLP scope but as part of MLP scope only Subscriber level (MSISDN - phone number) actions/offers will be configured.
   - OOTB Arbitration approach will be utilised as part of MLP scope i.e. Adaptive ML Models will be enabled and used.
   - Bundled Offers will not be covered in the scope of MLP.

4. Project Management
   - All activities will be validated and any client dependencies pre-agreed at start of the engagement to assure delivery timelines.
   - Client / Pega will assign dedicated PM, SMEs business and environments as agreed to support delivery activities
   - Any End to End Testing (System Integration Test, User Acceptance) test activities will be conducted by the Client team and will be supported by the Adqura team.

5. Miscellaneous
   - OOTB Reporting capabilities will be used as part of MLP scope.
   - Authentication and authorisation will be configured on Pega application as part of MLP scope. In later phases, LDAP authentication/authorisation can be configured.
   - Pega Simulation capabilities and discovery tools (Value Finder, Scenario Planner etc.) are not in scope of MLP.
   - Adqura will be able to deliver services non-production CDH environments from Adqura offices.
   - Taxes, Travel and Incidental expenses are not included.

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