Pega Customer Service

Implementation Planning Workbook

7.31

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Implementation planning workbook

This workbook is designed to help you define and document implementation requirements, and it is intended to be used with the "Initiation stage" and "Delivery stage" sections of the Implementation Guide. Some decisions will be made during your ongoing Direct Capture of Objectives (DCO) sessions, in the Delivery stage. This workbook includes the following sections:

* [Initiation stage worksheets](#_Ref987136001)
* [Delivery stage worksheets](#_Ref642604242)
* [Pega Chat worksheets](#_Ref1587239578)
* [Pega Customer Service Social Engagement worksheets](#_Ref1779255540)

Join the [Pega Customer Service forum](https://pdn.pega.com/communities) discussion on the PDN to get your questions answered as you start your implementation.

Initiation stage worksheets

Use the following worksheets to define requirements during the Initiation stage of a product implementation:

* [Creating the application](#_Ref1360752990)

Creating the application

The New Application wizard helps you create your application quickly. Use this worksheet to plan how you will complete each of the fields before you run the wizard.

Application settings

| Setting | Value |
| --- | --- |
| Application type | <application type> |
| Application name | <user-defined application name> |
| Use Customer Decision Hub? | <yes or no> |
|   |   |

Case types

| Application case types to include (or ALL) |
| --- |
|   |
|   |
|   |
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|   |
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|   |
|   |
|   |

Channels

| Channels to include (or ALL) |
| --- |
|   |
|   |
|   |

Data types

| Application data types to include (or ALL) |
| --- |
|   |
|   |
|   |
|   |
|   |
|   |

Selling mode

| Selling mode for your implementation | Yes / No |
| --- | --- |
| Mixed mode (B2B & B2C) |   |
| Business-to-business (B2B) |   |
| Business-to-consumer (B2C) |   |

Delivery stage worksheets

Use the following worksheets to define requirements during the Delivery stage of the implementation:

* [Case type modifications](#_Ref711017796)
* [Data model](#_Ref-396579524)
* [Application behavior](#_Ref-1142549969)
* [Behavior for additional components](#_Ref-1791541578)
* [User experience](#_Ref-1973102574)
* [Integration](#_Ref1461084344)
* [Security and organization structure](#_Ref-2114360062)
* [Reporting](#_Ref22224121)

Case type modifications

You define case types as part of your DCO sessions. This worksheet helps you in the planning of new case types, changes to existing case types, modifications to stages and processes, and defining case type attributes.

| Case type | Description | Stages |
| --- | --- | --- |
|   |   |   |
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Class group mapping

| Class name | Class group setting | Database table |
| --- | --- | --- |
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Locking behavior

| Case type | Lock when | Lock timeout |
| --- | --- | --- |
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Defining other assessment options

You can define other assessment options that are used with a discharge plan.

Types of assessments

| Option |
| --- |
|   |
|   |
|   |

Data model

Use this worksheet to identify which data types you want to associate with your application, source system for the data, how to connect to that source, property name and type (for example, Text, Integer, TrueFalse).

| Data type: <your data type> |
| --- |
| Source system: <your system of record> |
| Protocol: <method of connecting; ex. SOAP> |
| Property name | Source field name | Type | Size |
|   |   |   |   |
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Application behavior

The worksheets included in this section are for planning application-specific behavior.

Interaction driver categories

Use this worksheet to define your Interaction Type categories (known as Add Task menu categories in the Interaction Portal during Pega Express configuration).

| Interaction type (also known as Channel): <Call, Chat, etc.> |
| --- |
| Category name | Data source | Behaviors | Display conditions |
|   |   |   |   |
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Interaction to task mapping

| Interaction type (also known as Channel): <Call, Chat, etc.> |
| --- |
| Tasks | Category | Suggested |
|   |   |   |
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Dialog planning

| Work Type | Process | Flow Action | Dialog text |
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Coaching tips

| Work type | Process Action | Tip | User/Workgroup |
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Portal search

| Applies to class | CPM data source (Y/N) |
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Interaction goal

Add the properties that drive the interaction goal for your application as headings to this table.

| Customer value | Net promoter | Contact disposition | Return value |
| --- | --- | --- | --- |
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Call duration goal

Add the properties that drive the call duration goal for your application as headings to this table.

| Contact center volume | Customer value | Net promoter | Return value |
| --- | --- | --- | --- |
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Call verification

| Method (Contact, Account, None, Other) | If Other, describe method |
| --- | --- |
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|   |   |

Application settings

| Setting | Value |
| --- | --- |
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Customer events

Use this worksheet to identify customer activities that you want to track that are not tracked by default. For information about how to create a new event type in order to track a customer activity, see [Creating an event type in the Event Catalog](https://pdn.pega.com/sites/pdn.pega.com/files/help_v73/procomhelpmain.htm#dsm/tasks/dsm-cm-creating-event-tsk.htm).

| Event name | Event source | Customer ID source | Storage and retrieval options |
| --- | --- | --- | --- |
|   |   |   |   |
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Behavior for additional components

The worksheets included in this section are for planning the behavior of additional components.

Pega Intelligent Virtual Assistant for Facebook Messenger

Use this worksheet to define how you will configure the Pega Intelligent Virtual Assistant for Facebook Messenger feature.

| Configuration | Value |
| --- | --- |
| Use the Pega Intelligent Virtual Assistant for Facebook Messenger feature? | <yes or no> |
| Facebook page that will include the intelligent virtual assistant | <URL> |
| Facebook channel that will include the intelligent virtual assistant | <channel name> |
|  Case types that will include the intelligent virtual assistant | <case type 1><case type 2> |
| Custom responses | <response 1><response 2> |
| Natural Language Processing (NLP) text analyzers that require modifications | <analyzer name, and description of the modifications> |
| Custom categories for the text analyzers | <category name and text analyzer name> |
| Application operator record to copy to create a new application operator record when a new user interacts with the intelligent virtual assistant | <operator ID> |

Pega Co-Browse

User experience settings

| Setting | Value |
| --- | --- |
| Activation mode | <stealth, API, or button> |
| Fields that require masking |   |
| Pega Co-Browse window customizations |   |
| Custom message before connecting |   |
| Allow viewer to take control  | <yes or no> |

Pega Knowledge

| Case type | Process | Process action | Content needed |
| --- | --- | --- | --- |
|   |   |   |   |
|   |   |   |   |
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Customer Decision Hub for Pega Marketing

| Suggest when  | Intent task (also known as Service request) | CS case type | PM case type |
| --- | --- | --- | --- |
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Pega Call telephony settings

| Setting | Description |
| --- | --- |
| Call handling |   |
| Timeout  |   |
| Transfer types |   |
| Transfer reasons |   |

Pega Call variable mapping

| Description of data | Telephony variable | Variable Name (Call event) | Call page property (on CSR's clipboard | Comments |
| --- | --- | --- | --- | --- |
| Caller's phone number | ANI | pyANI | pyANI |   |
| Called phone number | DNIS | pyDNIS | pyDNIS |   |
| Cisco call variable 1 through 10  | pyCallVariables(1) through pyCallVars(10) |   | Cisco call variables are provided in pyCallVariables. They may be mapped to the call page and used to convey information about the caller that may trigger processing in PegaCS. Add lines to represent each Cisco call variable you need to map and use. |
| Cisco ECC variables, Genesys key-value pairs | pyNamedVariables("<key>") |   | Cisco ECC variables or Genesys key-value pairs are provided in pyNamedVariables. They may be mapped to the call page and used to convey information about the caller that may trigger processing in Pega Customer Service. Add lines to represent each variable that you need to map and use. |
| UUI | pyApplication ID |   | Avaya only: Avaya's UUI field may be mapped to the call page and used to convey account or other information. You can include multiple data elements within UUI, delimited by the | character - these variables are parsed into pyCallVariables. |
| Account Number |   |   | Account | Pega Customer Service uses the property Account for the caller's account number. Map from the telephony variable that holds this information. |
| Contact identified |   |   | ContactID | Pega Customer Service uses this property to identify the caller. Map from the telephony variable that holds this information. |
| Is the caller authenticated? |   |   | Verified | Pega Customer Service uses the Verified property to determine if the caller was authenticated at the IVR. Caller verification in Pega Customer Service will be skipped if this property is set. Map the appropriate telephony variable to this property. |

Net Promoter Score

| Describe follow-up case handling for passive/detractor |   |
| --- | --- |
|   |   |
|   |   |

User experience

The worksheets included in this section are for planning the user experience.

Customer composite

| Data element | Visible /Available /Accessible | Screen location |
| --- | --- | --- |
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Portals

| Portal | Section | Modifications |
| --- | --- | --- |
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Skinning

| Component | Style | Style sheet  |
| --- | --- | --- |
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Integration

The worksheets included in this section are for planning integration points.

| System of record  | Data needed | Int. Exists | Protocol |
| --- | --- | --- | --- |
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Security and organization structure

The worksheets included in this section are for planning security and identifying the organization structure.

Security model

Authentication

| Authentication scheme |
| --- |
|   |
|   |

Authorization

|  Access group  | Portal |  Roles  |
| --- | --- | --- |
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Privileges

| Privilege | Roles |
| --- | --- |
| CSR | Manager | SysAdmin |
| Perform | x |   |   |
| Update | x |   |   |
| Reopen | x |   |   |
| AssignExpertSkills |   | x | x |
| PegaCS AccessExpertAssist | x | x | x |
| QualityReview |   | x | x |
| UpdateDialog |   | x | x |
| UpdateCampaigns |   | x | x |
| UpdateCoachingTips |   | x | x |
| UpdateHotKeys | x | x | x |
| UpdateHotKeysAdmin |   |   | x |
| UpdateNavigation | x | x | x |
| ViewManagerContent |   | x | x |
| AccessPegaCSAccountManagerReports |   |   | x |
| AccessPegaCSManagerReports |   | x | x |
| AccessPegaCSSalesManagerReports |   |   | x |
| PegaCSAddFavorite |   | x | x |
| PegaCSEnableLinkedIn |   | x | x |
| EnableNewsConfig |   | x | x |

Organization structure

Divisions and Units

| Divisions | Units |
| --- | --- |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |

Operator Skills

| Operator Role | Associated Skills |
| --- | --- |
|   |   |
|   |   |
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|   |   |
|   |   |
|   |   |
|   |   |

Work groups

| Work groups | Description |
| --- | --- |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
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|   |   |
|   |   |

Operator Calendar

| Operator Role | Location | Associated Calendar |
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Reporting

This worksheets included in this section are for planning reporting requirements.

Report inventory

| Purpose | Source | Recipient | Frequency  | Key metric |
| --- | --- | --- | --- | --- |
|   |   |   |   |   |
|   |   |   |   |   |
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Dashboard reports

| Report | Add/Remove? | Format |
| --- | --- | --- |
|   |   | Examples: Pie Chart, Bar Graph |
|   |   |   |
|   |   |   |
|   |   |   |
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Pega Chat worksheets

Use the following worksheets to define requirements for a Pega Chat implementation:

* [Chat-enabled web pages](#_Ref-858050020)
* [Customer chat experience](#_Ref-810958054)
* [Proactive chat](#_Ref-881848188)
* [Chat queues](#_Ref1631836338)
* [URL mapping for chat](#_Ref1231402457)
* [Chat window flow](#_Ref-1857682643)
* [Common phrases](#_Ref-1189821319)
* [Page push](#_Ref872148260)
* [Chat widgets](#_Ref-998827312)
* [Chat server](#_Ref1345045511)

Chat-enabled web pages

| Chat server API token: <API key> |
| --- |
| Pega Co-Browse API key: <API key> |
| Web pages with chat enabled: |
| <name or URL of the web page> |
| <name or URL of the web page> |
|   |

Customer chat experience

You can customize the chat window to better match your website or branding.

The header section of the chat window is the logo and message that appears at the top of the window. The text and message oval sections of the chat window is the conversation area, which includes system messages.

 For more information about the requirements of chat window branding, see Defining the chat window branding and Branding the customer chat window in the Pega Customer Service Implementation Guide on the [Pega Customer Service product page](https://pdn.pega.com/products/pega-customer-service).

Header appearance

| Font family | Font color | Background color | Icon |
| --- | --- | --- | --- |
| <font name> | <hexadecimal color value> | <hexadecimal color value> | <image file name and path> |

Text appearance

| Customer chat background color | Font color | Font family | CSR chat background color |
| --- | --- | --- | --- |
| <hexadecimal color value> | <hexadecimal color value> | <font name> | <hexadecimal color value> |

Message header appearance

| Font family | Background color | Font color |
| --- | --- | --- |
| <font name> | <hexadecimal color value> | <hexadecimal color value> |

Proactive chat

| Setting | Value |
| --- | --- |
| Enable proactive chat? | <yes or no> |
| Based on how long the chat-enabled page is viewed? | <yes or no> |
| If yes, number of seconds? | <number of seconds> |
| Based on how many chat-enabled pages are viewed? | <yes or no> |
| If yes, number of seconds? | <number of views> |
| Based on how long the website is viewed? | <yes or no> |
| If yes, number of seconds? | <number of seconds> |
| Invitation text? | <message to display to customer to invite them to a chat session> |

Chat queues

| Queue name: <name or queue> |
| --- |
| Skills required: <skills required to provide service for this queue> |
| Calendar: <hours of operation for this queue> |
| Off-hours message: <message to display to customer> |
| Agent Not Available message: <message to display to customer> |
| Service Level: Service <%> of customers within <number> of seconds |
| Pre-chat question key | Pre-chat question full text | Pre-populate? | If yes, when? |
| <property 1> | <question 1> | <yes or no> | <when to pre-populate the answer> |
| <property 2> | <question 2> | <yes or no> | <when to pre-populate the answer> |
|   |   |   |   |

URL mapping for chat

| Pattern | Queue |
| --- | --- |
| <pattern of URL pages to map> | <chat queue for matching chat-enabled pages> |
|   |   |
|   |   |

Chat window flow

| Problem category | Chat queue | Subflow actions |
| --- | --- | --- |
| <problem 1 name> | <chat queue name> | <show knowledge articles, present guided troubleshooting questions, route to chat queue, or other> |
| <problem 2 name> |   |   |
|   |   |   |

Pega Knowledge articles

| Subflow: <name of subflow |
| --- |
| Articles to present |
| <question 1> |
| <question 2> |

Common phrases

| Name | Text | Language |
| --- | --- | --- |
| Category 1: <category of common phrases> |
| Example: LookupAcct | Please wait a moment while I look up your account number. | <If the phrase is language-specific, identify the language> |
|   |   |   |
|   |   |   |
| Category 2: <category of common phrases> |
|   |   |   |
|   |   |   |
|   |   |   |

Page push for chat

| Page Name | Page URL | Language |
| --- | --- | --- |
| Category 1: <category of web pages to push> |   |
| <Name that identifies this web page to the CSR> | <URL of the chat-enabled web page | <If the web page is language-specific, identify the language> |
|   |   |   |
|   |   |   |
| Category 2: <category of web pages to push> |   |
|   |   |   |
|   |   |   |

Chat widgets

| Widget to show | Slot number |
| --- | --- |
| <widget name> | <For the selected layout template, the number of the display slot in which to show the widget> |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |

Chat server

Chat server location

| Location: <On-premises or Pega Cloud Collaboration Services> |
| --- |

Chat server configuration

| Setting | Value |
| --- | --- |
| Chat server type | Pegasystems |
| Host name of the chat server | <host name or IP address> |
| Server configuration protocol | <http or https> |
| Server configuration port | <TCP port number> |
| Server configuration key | <unique key> |
| Client communication protocol | <http or https> |
| Client communication port | <TCP port> |
| Reconnect interval | <number of seconds> |
| Reconnect attempts | <maximum number of reconnect attempts> |
| Max concurrent conversations | <a number> |

Pega Social worksheets

Use the following worksheets to define requirements for a Pega Social implementation.

* [Compiling Twitter handles and Facebook pages](#_Ref423736964)
* [Adding or modifying wrap-up reason codes for social interaction](#_Ref436091916)

Compiling Twitter handles and Facebook pages

| Twitter handles | Facebook pages |
| --- | --- |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |

Adding or modifying wrap-up reason codes for social interaction

| Resolved | Dismissed |
| --- | --- |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |