**MARKETING**

Pega Marketing

## Implementation Planning Workbook

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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](#_bookmark1)
* [Delivery stage worksheets](#_bookmark3)
* Pega Chat worksheets
* Pega Customer Service Social Engagement worksheets

# Initiation stage worksheets

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

* [Creating the application](#_bookmark2)

## 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.

***Table 1: Application settings***

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

***Table 2: Case types***

|  |
| --- |
| **Application case types to include (or ALL)** |
|  |
|  |
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***Table 3: Channels***

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

***Table 4: Data types***

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

**Delivery stage worksheets**

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

* [Integration](#_bookmark4)
* [Business issues and groups](#_bookmark5)
* [Customer class and associated entities](#_bookmark6)
* [Prospect class](#_bookmark7)
* [Data model](#_bookmark8)
* [Security and organization structure](#_bookmark9)
* [Reporting](#_bookmark12)
* [Email and SMS account information](#_bookmark13)
* [Apps for use with push notifications](#_bookmark14)

## Integration

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

|  |  |  |  |
| --- | --- | --- | --- |
| **System of record** | **Data needed** | **Int. Exists** | **Protocol** |
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## Business issues and groups

Use the following worksheet to define the business issues and groups for your decisioning hierarchy.

|  |
| --- |
| **Business issue Business groups** |
| <name of business issue> <business group 1><business group 2> |

|  |
| --- |
| **Business issue Business groups** |
|  |

## Customer class and associated entities

Use this worksheet to plan your customer class extension.

|  |
| --- |
| **Customer class name: <class name>** |
| **Associated entities:** |
| <entity name><entity name> |

|  |
| --- |
| **Customer class key: <property name>** |
|  |

## Prospect class

Use this worksheet to plan your prospect class extension.

|  |  |
| --- | --- |
| **Prospect class name:** | <class name> |
| **Prospect class ruleset:** | <ruleset name> |
| **Prospect list structure:** |  |
| **Column name** | **Property name** |
| <COLUMN\_NAME> | <.PropertyName> |
| <COLUMN\_NAME> | <.PropertyName> |
|  |  |
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| --- | --- |
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## 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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## Security and organization structure

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

* [Security model](#_bookmark10)
* [Organization structure](#_bookmark11)

### Security model

Testing keywords:

***Table 5: Authentication***

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

***Table 6: Authorization***

|  |  |  |
| --- | --- | --- |
| **Access group** | **Portal** | **Roles** |
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### Organization structure

***Table 7: Divisions and Units***

|  |  |
| --- | --- |
| **Divisions** | **Units** |
|  |  |
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## Reporting

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

***Table 8: Report inventory***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Purpose** | **Source** | **Recipient** | **Frequency** | **Key metric** |
|  |  |  |  |  |
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***Table 9: Dashboard reports***

|  |  |  |
| --- | --- | --- |
| **Report** | **Add/Remove?** | **Format** |
|  |  | Examples: Pie Chart, Bar Graph |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Report** | **Add/Remove?** | **Format** |
|  |  |  |
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## Email and SMS account information

Use this worksheet to identify email and SMS account information for your outbound and inbound transactions. The Pega-provided email accounts are both configured as outbound email accounts.

***Table 10: Outbound email transactions***

|  |
| --- |
| **Account name: Default** |
| **Email provider: <your email provider name>** |
| **Sender settings** |
| **Setting** | **Value** |
| Full name | <name> |
| From\* | <value@co.com> |
| User ID | <value@co.com> |
| Password | <password> |
| Reply to | <value@co.com> |
| Host (SMTP)\* | <hostname> |
| Port | <number> |
| Use SMTPS | <yes or no> |
| Message signing: Keystore instance | <value> |
| Message signing: Certificate alias | <value> |

***Table 11: Outbound email transactions***

|  |
| --- |
| **Account name: PegaMKT-Work** |
| **Email provider: <your email provider name>** |
| **Sender settings** |
| **Setting Value** |
| Full name <name>From\* <value@co.com>User ID <value@co.com>Password <password>Reply to <value@co.com>Host (SMTP)\* <hostname> |

|  |
| --- |
| **Account name: PegaMKT-Work** |
| **Email provider: <your email provider name>** |
| **Sender settings** |
| **Setting Value** |
| Port <number>Use SMTPS <yes or no>Message signing: Keystore instance <value>Message signing: Certificate alias <value> |

***Table 12: Outbound SMS transactions***

|  |
| --- |
| **Account name: Default** |
| **Setting** | **Value** |
| Setup settings |  |
| Account name\* | <name> |
| Host address\* | <host address> |
| Host port\* | <number> |
| User ID\* | <ID> |
| Password | <password> |
| Test number\* | <number> |
| Sender's number | <number> |
| Maximum connections | <number> |
| Advanced settings |  |
| Unit cost\* | <N.NN format> |
| Source TON | <number> |
| Source NPI | <number> |
| Response timeout in seconds | <seconds> |
| Max number of retries | <number> |
| Character encoding type | <encoding type> |
| Reconnect on disconnect? | <yes or no> |
| Additional settings (SMPP properties) |  |
| <Name> | <value> |

***Table 13: Inbound SMS transactions***

|  |
| --- |
| **Setting Value** |
| Setup settingsAccount name\* <name>Host address\* <host address>Host port\* <number>Inbox address\* <address> |

|  |  |
| --- | --- |
| **Setting** | **Value** |
| Host IP address\* | <address> |
| User ID | <ID> |
| Password | <password> |
| Reconnect time in seconds | <number> |
| Response timeout in seconds | <number> |
| Maximum connections | <number> |
| Additional settings (SMPP properties) |  |
| <Name> | <value> |

## Apps for use with push notifications

Use this worksheet to identify apps to register for use with push notification.

***Table 14: Apps***

|  |
| --- |
| **App name: <your app name>** |
| **Description <you app description>** |
| **Platform <Android or iOS>** |
| **Unique ID <your app ID>** |
| **Android app** |
| **Setting** | **Value** |
| **Google key** | **<value>** |
| **iOS app** |
| **Setting** | **Value** |
| App certificate | <choose file> |
| Certificate name | <name> |
| Certificate password | <password> |
| Certificate type | <Production or Development> |
| Monitor Apple's notification feedback service? | <yes or no> |