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Question 1

Question Type: MultipleChoice

A bank has been running traditional marketing campaigns for many years. One such campaign sends an offer email to qualified customers on day one. On day five, the bank presents a similar offer if the first email is ignored.

If you re-implement this requirement by using the always-on outbound customer engagement paradigm, how do you approach this scenario?

Options:

A- Create an action with a flow that contains two send Email shapes, one for each email. Set appropriate wait times between the shapes

B- Configure the primary schedule to run daily and let the artificial intelligence (AI) choose the best action based on engagement policies

C- Configure a primary schedule for the original offer email and setup an ad-hoc schedule to send the second email

D- Create two segments to identify the target audience for each of the two offer emails: day one, and day five. Set up two schedules per day for the two segments

Answer:

B

Explanation:

In the always-on outbound customer engagement paradigm, leveraging AI and continuous decisioning is crucial:

AI-Driven Decisioning:

Step 1: Configure the primary schedule to run daily, allowing the AI engine to continuously evaluate and select the best action for each customer.

Step 2: The AI considers engagement policies, customer behavior, and contextual data to determine the most relevant action.

Benefits of Always-On Engagement:

Continuous evaluation of customer interactions ensures that the actions presented are timely and contextually relevant.

It allows for dynamic adjustment of offers based on real-time data and customer responses.

Implementation Steps:

Step 1: In Next-Best-Action Designer, set up a primary schedule to run daily.

Step 2: Define engagement policies and configure AI models to select actions based on customer interactions and preferences.

Step 3: Allow the AI to decide whether to resend the original offer or present a new offer based on the customer's response or lack thereof.

Example:

If the customer ignores the first email, the AI might decide to send a reminder email or a different offer based on updated engagement data and policy rules.

Pega-Customer-Decision-Hub-User-Guide-85.pdf: 'Configuring a recurring schedule for Next-Best-Action' section.

Pega documentation on 'Using AI in decisioning'.

Question 2

Question Type: **MultipleChoice**

U+ Bank has recently defined two contact policies:

1. Suppress a group of credit card offers for 30 days if any credit card offer is rejected three times in any channel in the past 15 days

2. Suppress the Reward card offer, part of the credit card group, for 7 days if it is rejected twice in any channel in the last 7 days

Paul, an existing U+ Bank customer, no longer sees the Reward card offer. What is the reason that Paul cannot see the offer?

Options:

A- Paul rejected other credit card offers twice on the web channel and once in contact center

B- Paul rejected the Reward card offer once on the web channel

C- Paul rejected the Reward card offer once in contact center

Answer:

A

Explanation:

Paul cannot see the Reward card offer due to the contact policies defined by U+ Bank:

Contact Policies Defined:

Policy 1: Suppress a group of credit card offers for 30 days if any credit card offer is rejected three times in any channel in the past 15 days.

Policy 2: Suppress the Reward card offer for 7 days if it is rejected twice in any channel in the last 7 days.

Paul's Rejection History:

Paul has rejected other credit card offers twice on the web channel and once in the contact center within the last 15 days.

Reason for Suppression:

Due to Policy 1, since Paul has rejected any credit card offer (not specifically the Reward card) three times in any channel in the past 15 days, all credit card offers, including the Reward card offer, are suppressed for 30 days.

Understanding the Suppression Logic:

Step 1: The decision strategy evaluates the rejection history of offers.

Step 2: It applies the contact policies to determine which offers should be suppressed.

Step 3: In this case, the policy conditions are met due to multiple rejections of credit card offers, leading to the suppression of the Reward card offer.

Pega-Customer-Decision-Hub-User-Guide-85.pdf: 'Setting constraints, contact policy limits, and controls' section.

Pega documentation on 'Managing contact policies'.

Question 3

Question Type: MultipleChoice

Reference module: Creating and understanding decision strategies

In a Prioritize component, the top action can be determined based on the value of ________ .

Options:

A- average margin of all actions

B- Customer.Value

C- Primary.Income

D- the propensity

Answer:

D

Explanation:

In a Prioritize component in Pega Customer Decision Hub, the top action is determined based on the propensity value. Propensity refers to the likelihood that a customer will respond positively to a given action. Here's a detailed explanation:

Definition of Propensity:

Propensity is a score that indicates the probability of a customer taking a desired action, such as accepting an offer or responding to a campaign. It is calculated using predictive models that analyze historical data and customer behavior.

Role in Prioritize Component:

The Prioritize component in a decision strategy uses the propensity values to rank actions. Actions with higher propensity values are given higher priority, ensuring that the most relevant and likely-to-succeed actions are selected for the customer.

Configuration Steps:

Step 1: In the strategy canvas, add a Prioritize component.

Step 2: Configure the component to use the propensity value for ranking actions. This can be done by selecting the appropriate property that holds the propensity score, typically provided by a prediction model.

Step 3: Connect the Prioritize component to other components in the strategy to ensure the highest priority actions are selected and offered to the customer.

Benefits:

Using propensity to determine the top action helps in making data-driven decisions, increasing the chances of customer engagement and improving overall campaign effectiveness.

Pega-Customer-Decision-Hub-User-Guide-85.pdf: 'Understanding the Next-Best-Action strategy framework' section.

Pega documentation on 'Creating and understanding decision strategies'.

Question 4

Question Type: MultipleChoice

Reference module: Sending offer emails

What is best practice for designing an action flow?

Options:

A- When designing a flow to be reused across multiple actions, use the Specify Treatment option to configure it with a specific treatment

B- Always configure an action with its own flow

C- When creating an action to be used as a flow template, set its availability to Always

D- Limit the number steps per channel to 3

Answer:

A

Explanation:

Best practices for designing an action flow in Pega Customer Decision Hub emphasize reusability and efficient configuration:

Reusable Flows:

Step 1: When creating a flow that will be reused across multiple actions, it is recommended to use the 'Specify Treatment' option.

Step 2: This approach allows you to configure the flow with a specific treatment, making it easier to apply the same flow logic to different actions without having to redesign the flow each time.

Flow Configuration:

Using the 'Specify Treatment' option ensures that the treatment details are dynamically inserted when the action is executed, providing flexibility and consistency across various actions.

This method helps maintain a modular design, where flows can be reused and updated independently of the actions they are associated with.

Avoid Redundancy:

Step 1: Reusing flows across multiple actions reduces redundancy and simplifies maintenance.

Step 2: Any changes to the flow logic need to be made only once, and these changes will be reflected across all actions using that flow.

Example:

If you have a standard email flow for promotional offers, you can configure this flow with the 'Specify Treatment' option and reuse it for different promotional actions such as discounts, new product launches, or seasonal offers.

Pega-Customer-Decision-Hub-User-Guide-85.pdf: 'Configuring the delivery of an email treatment with the Send Email shape' section.

Question 5

Question Type: MultipleChoice

Reference module: Sending offer emails

U+ Bank currently uses Next-Best-Action Designer to manage 1:1 customer engagement in the web channel. The bank would like to promote the same offers in email. Which two additional configurations are needed in Next-Best-Action Designer to promote the offers in email? (Choose Two)

Options:

A- Ensure that the email channel is enabled

B- Configure the arbitration to boost prioritization of actions meant for email

C- Define the primary schedule

D- Create a separate issue and group business structure in the taxonomy that is specific to email actions

E- Setup real-time container triggers to communicate with the email server

Answer:

A, C

Explanation:

To promote offers in email using Next-Best-Action Designer, U+ Bank needs to ensure that specific configurations are in place.

Enable the Email Channel:

Step 1: Go to Next-Best-Action Designer in Pega Customer Decision Hub.

Step 2: Navigate to the Channels tab and ensure that the Email channel is toggled on.

Step 3: Configure the email channel settings, including the email server and any necessary authentication details.

Define the Primary Schedule:

Step 1: In Next-Best-Action Designer, navigate to the Engagement Policy tab.

Step 2: Define the primary schedule for when email communications should be sent. This includes setting the frequency and timing of emails.

Step 3: Ensure that the schedule aligns with the bank's overall marketing calendar and customer engagement strategy.

Additional Considerations:

Arbitration Configuration: While not mandatory, configuring arbitration to boost prioritization of actions meant for email can help ensure that email offers are given appropriate priority.

Real-Time Container Triggers: Setting up real-time container triggers to communicate with the email server is essential if real-time email communication is required, though it is not specifically needed for scheduled email campaigns.

Example Implementation:

U+ Bank can start by enabling the email channel and configuring the primary schedule for their email campaigns. Once these steps are completed, they can create email treatments for their offers and test them using seed lists to ensure personalization and content accuracy.

Pega-Customer-Decision-Hub-User-Guide-85.pdf: 'Understanding Next-Best-Action Designer channels' and 'Configuring email treatments' sections.

Pega documentation on 'Sending offer emails' and 'Creating treatments for additional channels'.

Question 6

Question Type: MultipleChoice

Reference module: Defining an action for outbound

Which statement is true about email treatments?

Options:

A- When you design emails using external tools, you cannot include Pega-specific personalization tags

B- You can personalize the email subject, for example, Dear <customer name>

C- When you use a seed list to test an email, the personalization attributes do not appear in the received email

D- You must always embed the images in the email

Answer:

B

Explanation:

Email treatments in Pega Customer Decision Hub allow for personalization, including customizing the email subject to address the customer by name or other personalized data.

Definition and Purpose:

Email treatments are used to define the content and presentation of email communications sent to customers as part of outbound campaigns.

Personalization enhances the relevance and engagement of these emails by including customer-specific information.

Capabilities of Email Treatments:

Personalization Tags: Pega supports the inclusion of dynamic tags in the email subject and body, allowing for personalized greetings, offers, and other content. For example, 'Dear <customer name>' where '<customer name>' is dynamically replaced with the actual name of the customer.

HTML Content: Design rich email content using HTML, which can include images, links, and other multimedia elements.

Steps to Personalize Email Subjects:

Step 1: Create or edit an email treatment in Pega.

Step 2: In the subject line field, use the syntax for personalization tags. For example, 'Dear <customer name>, check out our new offers!'.

Step 3: Map the personalization tags to the appropriate customer data fields to ensure the correct information is inserted when the email is sent.

Testing Personalization:

Use seed lists to test personalized emails. Seed lists are groups of test email addresses used to preview how the email will look when sent to actual customers.

Ensure that personalization attributes appear correctly in the received test emails.

Best Practices:

Always test personalized emails thoroughly before launching a campaign to ensure that the tags are working correctly and the content renders as expected.

Use personalization to enhance customer engagement by making emails feel more relevant and tailored to individual recipients.

Pega-Customer-Decision-Hub-User-Guide-85.pdf: 'Configuring email treatments' section.

Pega documentation on 'Defining an action for outbound'.

Question 7

Question Type: MultipleChoice

Reference module: Creating and understanding decision strategies

Enrichment decision components provide the ability to _________.

Options:

A- enrich a decision strategy with comments

B- set customer properties

C- set a text value to a strategy property

D- filter actions based on priority and relevance

Answer:

B

Explanation:

Enrichment decision components in Pega Customer Decision Hub provide the ability to set customer properties. These components are used to enhance the customer data within a decision strategy by adding or updating information about the customer. This allows for more personalized and contextually relevant decisions.

Definition and Purpose:

Enrichment components are used within decision strategies to add or update customer data, ensuring that the decisioning process has the most relevant and up-to-date information.

This can include setting properties like customer preferences, behaviors, or other attributes that might influence the decision outcome.

Types of Enrichment Components:

Set Property: This is the primary enrichment component used to set a value to a property within the strategy.

Data Import: Importing data from external sources to enrich the customer profile.

Data Transform: Applying transformations to data to format or manipulate it as needed within the strategy.

Usage in Decision Strategies:

When designing a decision strategy, enrichment components are typically used in the initial stages to ensure that all necessary customer data is available and accurate before proceeding to decision logic components.

For example, before evaluating eligibility or applicability, you might use an enrichment component to update the customer's credit score or recent transaction history.

Implementation Steps:

Step 1: Drag the enrichment component into the decision strategy canvas.

Step 2: Configure the component by selecting the property to set and defining the value or expression to be used.

Step 3: Connect the enrichment component to other components within the strategy to ensure the enriched data is utilized in subsequent decision-making steps.

Example:

Consider a scenario where a bank wants to offer personalized loan options based on the customer's recent financial activities. An enrichment component can be used to update the customer's profile with their latest transaction data, ensuring that the loan offer is tailored to their current financial status.

Pega-Customer-Decision-Hub-User-Guide-85.pdf: 'Understanding the Next-Best-Action strategy framework' section, which describes the use of enrichment components in decision strategies.

Pega documentation on 'Creating and understanding decision strategies'.

Question 8

Question Type: MultipleChoice

Reference module: Adding more tracking time periods for contact policies

A bank is currently displaying a group of mortgage offers to its customers on their website. The bank wants to suppress the mortgage group for 15 days if a customer ignores three offers from the mortgage group. How do you define the suppression rule for this requirement?

Options:

A- Suppress an action for 15 days if there are 3 rejects for web channel

B- Suppress a group of actions for 15 days if there are 3 rejects for any channel

C- Suppress a group of actions for 15 days if there are 3 impressions for the web channel without a click

D- Suppress an action for 15 days if there are 3 impressions for any channel without a click

Answer:

B

Explanation:

To define a suppression rule in Pega for the scenario where a group of mortgage offers should be suppressed for 15 days if a customer ignores three offers from the mortgage group, follow these steps:

Define the Suppression Rule:

Create a contact policy in Pega Customer Decision Hub to suppress the group of mortgage actions.

Specify the Condition:

Set the condition to suppress the group of actions if there are 3 rejects (ignored offers) for any channel. This means the suppression applies regardless of whether the offers were displayed on the web, mobile, email, etc.

Set the Suppression Duration:

Configure the suppression period to be 15 days. This ensures that the group of actions will not be shown to the customer for 15 days after they have ignored three offers.

Apply the Contact Policy:

Ensure the contact policy is associated with the relevant group of actions (mortgage offers) and that it is enforced by the strategy framework.

Test and Validate:

Test the suppression rule to verify it works as expected and that the offers are suppressed correctly after three rejects.

Pega Customer Decision Hub User Guide 8.7: Adding more tracking time periods for contact policies, Creating a contact policy, Contact policy library.

Question 9

Question Type: MultipleChoice

Reference module: Creating and understanding decision strategies

In a decision strategy, to use a customer property in an expression, you _____.

Options:

A- define the property as a strategy property

B- define the Customer page in Pages and Classes

C- prefix the property with the keyword Customer

D- use the property as defined without a prefix

Answer:

C

Explanation:

To use a customer property in an expression within a decision strategy in Pega, follow these steps:

Identify the Customer Property:

Determine the specific customer property you want to use in your strategy.

Prefix with 'Customer':

In Pega, customer properties are accessed by prefixing them with the keyword Customer. This ensures that the property is correctly referenced from the customer data.

Use the Property in Expression:

When defining an expression in a decision strategy, include the Customer prefix. For example, if the property is Age, use Customer.Age.

Verify Property Definition:

Ensure that the property is correctly defined in the data model and accessible within the strategy context.

Pega Customer Decision Hub User Guide 8.6: Understanding the Context Dictionary, Configuring the Context Dictionary.

Question 10

Question Type: **MultipleChoice**

Reference module: Essentials of always-on outbound

A bank has been running traditional marketing campaigns for many years. One such campaign sends an offer email to qualified customers on day 1. On day 3, it sends a reminder email to customers who haven't responded to the first email. On day 7, it sends a second reminder to customers who haven't responded to the first two emails. If you were to re-implement this requirement using the always-on outbound customer engagement paradigm, how would you approach this scenario?

Options:

A- Configure a primary schedule for the original offer email and setup an ad-hoc or emergency schedule to send reminder emails

B- Configure the primary schedule to run daily and let the AI choose the best action from all the actions that a customer qualifies for based on engagement policies

C- Create an action with a flow that contains 3 Send Email shapes, one for each email. Set appropriate wait times between the shapes

D- Create three segments to identify the target audience for each of the three offer emails- day 1, day 3 and day 7. Setup three schedules per day targeting each of the three segments

Answer:

B

Explanation:

To re-implement the bank's traditional marketing campaign using the always-on outbound customer engagement paradigm in Pega, follow these steps:

Understand the Traditional Campaign Requirements:

Day 1: Send an offer email to qualified customers.

Day 3: Send a reminder email to customers who haven't responded to the first email.

Day 7: Send a second reminder to customers who haven't responded to the first two emails.

Set Up Next-Best-Action Designer:

Use the Next-Best-Action Designer to define engagement policies, arbitration, and channels to manage customer interactions.

The always-on approach continuously evaluates customer interactions and selects the best action based on real-time data and AI-driven insights.

Configure the Primary Schedule:

Set up a daily run schedule for the Next-Best-Action strategy. This allows the AI to evaluate customer interactions daily and decide the best action to take.

Leverage AI for Decisioning:

Configure the AI models to determine the best action for each customer based on their interaction history and engagement policies. The AI will automatically handle:

Sending the initial offer email on Day 1.

Sending a reminder email on Day 3 to those who haven't responded.

Sending a second reminder on Day 7 to those who still haven't responded.

Define Engagement Policies:

Eligibility: Define which customers qualify for the offer.

Applicability: Ensure the offer is relevant to the customer.

Suitability: Verify that sending the offer is in the best interest of the customer.

Contact Policies: Set rules to manage the frequency and timing of emails to avoid over-communication.

Implement AI-Driven Actions:

Use the Next-Best-Action strategy framework to select actions (e.g., sending emails) based on the AI model's recommendations.

Configure treatments (email content) and channels (email) within the Next-Best-Action Designer.

Monitor and Adjust:

Continuously monitor the performance of the campaign using Pega's analytics and adjust the strategy as needed to optimize engagement and response rates.

Pega Customer Decision Hub User Guide 8.5: Understanding Next-Best-Action Designer basics, Configuring the Next-Best-Action Designer for Pega Customer Service, Setting constraints contact policy limits and controls.

Question 11

Question Type: MultipleChoice

Reference module: Next-Best-Action in an omnichannel environment

A bank uses Pega Customer Service in its contact center. When a call comes in, it is routed to a service representative. Once the service representative accepts the call, the Customer Decision Hub (CDH) determines the Next-Best-Action to be offered to the customer. What two pieces of information is used by the Customer Decision Hub to determine the Next-Best-Action recommendations? (Choose Two)

Options:

A- The previous customer's profile

B- Call context

C- Customer Profile

D- The service representative's profile

Answer:

B, C

Explanation:

Identifying the Requirement:

The bank uses Pega Customer Service in its contact center and wants to use CDH to determine the Next-Best-Action when a call is accepted by a service representative.

The task is to determine what pieces of information are used by Pega CDH to determine the Next-Best-Action recommendations.

Evaluating Pega CDH Capabilities:

Pega CDH integrates seamlessly with Pega Customer Service to leverage real-time customer data and contextual information.

The system uses a combination of call context (information specific to the current call) and customer profile (historical and demographic data) to make informed decisions.

Process Overview:

Call Context:

Includes details such as the reason for the call, current issues or inquiries, and any immediate needs or concerns expressed by the customer during the call.

Customer Profile:

Comprises historical interaction data, customer preferences, past purchases, and any predictive analytics that provide insights into customer behavior and needs.

Next-Best-Action Determination:

Pega CDH processes this combined data to generate the most relevant and timely action recommendations for the service representative to offer to the customer.

Reference and Supporting Documentation:

The Pega Customer Decision Hub User Guide outlines that the system uses both the call context and the customer profile to determine the Next-Best-Action in a contact center environment, ensuring personalized and contextually relevant interactions.

Pega-Customer-Decision-Hub-User-Guide-85.pdf

Pega-Customer-Decision-Hub-User-Guide-86.pdf

Pega-Customer-Decision-Hub-User-Guide-87.pdf

Question 12

Question Type: **MultipleChoice**

Reference module: Testing engagement policy conditions using audience simulation

U+ Bank, a retail bank, recently implemented a project in which credit card offers are presented to qualified customers when the customers log in to the web self-service portal. The bank now plans to amend its engagement policy conditions. As a Decisioning Consultant, which simulation do you run to check if the conditions are too broad or narrow for your requirements?

Options:

A- Audience simulation

B- Pega Scenario Planner

C- Ethical Bias Check

D- Persona Testing

Answer:

A

Explanation:

Identifying the Requirement:

The bank has chosen an email service provider that prefers receiving customer batches through a cloud storage location on either Microsoft Azure or Amazon S3.

The task is to find out how Pega Customer Decision Hub can integrate with these cloud storage solutions.

Evaluating Pega CDH Capabilities:

Pega Customer Decision Hub provides robust capabilities for integrating with various external systems and cloud storage solutions.

The documentation for Pega CDH supports writing action details directly to cloud storage solutions like Microsoft Azure and Amazon S3, which is in line with modern cloud infrastructure practices.

Process Overview:

Configuration:

Configure the external storage location (Azure Blob Storage or Amazon S3) within Pega CDH.

Action Flow:

Define the action flow to include steps for writing data to the specified cloud storage.

External Integration:

Use built-in connectors or custom integration points to handle data transfer securely and efficiently.

Reference and Supporting Documentation:

According to the Pega Customer Decision Hub User Guide, you can configure Pega CDH to write action details directly to cloud storage solutions like Microsoft Azure and Amazon S3 (refer to the section on configuring the delivery of multiple treatments and external integration points).

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