MARKETING

Pega Marketing

Product Overview

8.2

PEGA

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Product overview

Marketing organizations looking to make a significant impact on the customer experience and to drive an effective return on marketing investment are turning to a Next-Best-Action approach to marketing. The Pega approach to marketing uses decision management and analytics to determine the right action for every customer and provides customers with the right message, at the right time, in the right channel.

Built for marketers responsible for managing inbound and outbound customer communications and experiences across paid and owned channels, the solution delivers on this vision through a unique combination of real-time inbound and outbound marketing, campaign management, and marketing operations capabilities that leverage predictive and adaptive analytics, real-time decisioning, and business process management. The Pega marketing solution dynamically manages multi-channel conversations through the entire customer lifecycle, from offer design to offer fulfillment.

Measurable business benefits

Creating relevant experiences for every customer

Turn every interaction into a guided, relevant conversation by executing the Next Best Action at the moment of truth. This solution continuously learns and adapts to every customer in real time, across all channels, including paid and mobile.

Giving marketers more control

Design, change, measure, and control multi-channel customer strategies with a single marketing application and portal that does not require IT involvement. Pega is the only solution to support marketing operations with a robust business process management platform that seamlessly connects sales with the customer fulfillment processes.

Optimizing customer lifetime value

Maximize revenue with proactive cross-sell, up-sell, and retention opportunities for customers, and coordinate the experience across inbound and outbound and also paid and owned channels. The solution provides the optimum balance between various customer needs and the specific needs of the business.

Marketing use case examples

The table below presents an example list of common use cases. Each represents a scenario in which a customer may utilize Pega Marketing to achieve a business objective:

Use case	Description
Retention	Pega Marketing provides the agent with the tools to ensure that they understand the value of the customer and the best options to retain customers who are looking to churn.

Use case	Description
Cross-Sell/Upsell	Next Best Offer prioritized ranking is supported by all the necessary arguments and collateral to convert the opportunity.
Negotiation-Based Selling	This engagement type takes a more consultative approach to selling by putting the customer in charge of the conversation while ensuring that the negotiation stays within the budgets calculated for this customer.
Product/Service Usage Stimulation	Communicating to customers proactively to entice or stimulate product or service usage. Calculating the right incentive for each customer will ensure a higher conversion rate.
Renewal Reminders/Retention	Targeting customers who are approaching key product events to ensure they remain loyal customers.
Newsletter, Article, Content Marketing	Driving traffic to landing pages or microsites to capture customer details and fuel lead capture and conversion processes.
Significant Event/Anniversary Communication	Daily Campaigns that seek out customers with important anniversary dates with specific, personalized messages, e.g., Birthday Campaign.
Acquisition	Either direct to customers or via prospect lists to drive growth of the customer base.
On-Boarding	Initial communications focusing on things like Welcome packs, Sign-up for Auto-Pay, Payment reminders, and product and service awareness.
Product/Service Promotion	Product and service promotions to generate awareness or education to support or coincide with product launches.
Retargeting	Targeting customers who partially engaged on with appropriate messaging to reinforce the features and benefits.
Viral Marketing	Capturing customer details and other related data items and using these to trigger other marketing messages to create the potential for very high visibility and visibility of the company messages.
Incentive-Driven, Game-Oriented Marketing	Using what we know to tailor individual communications for each customer to ensure they are relevant, timely, and appropriate.
Seasonal Marketing	Keeping organizations in the mind of the customer at relevant times of the year.
Bundling	By packaging up multiple offers within a parent offer, bundling enables organizations to communicate a tailored package of offers to each customer.
Location-based marketing	Target customers based on their location using Geofence functionality.
Event initiated/Trigger marketing	Respond to real-time marketing opportunities by pushing relevant offers to customers.

High-level capabilities

Next-Best-Action marketing

Customer-centric approach to marketing that combines traditional business rules with predictive and adaptive analytics to provide real-time and batch marketing offers and treatments to drive customer lifetime value. This includes the capabilities to allow marketers to create a cross-channel engagement strategy that continuously look at customer history and many different customizable attributes to determine the top offer, best time, specific treatment, and best channel to interact with customers and prospects.

Next-Best-Action Advisor

An agent-assisted channel application that provides a best practice implementation of Next-Best-Action for use by call center agents, retail users and brokers. Includes UI panels and decision logic for offer presentment, bundle negotiation, what-if analysis, needs assessment and house-holding. Advisor provides flexible deployment options, allowing it to be deployed within Pega Customer Service and Sales Automation, as a standalone application or embedded within a third-party desktop.

Retail Advisor

Retail Advisor extends the power and capabilities of Next-Best-Action for Sales, Servicing, and Marketing for retail employees and self-service kiosks. Customers can look on with employees to configure personalized product bundles at their convenience on a tablet device.

Paid Media Manager

Paid Media Manager extends Next-Best-Action to paid channels including Facebook Ads, Google Ads, and LinkedIn Ads. Which offer or offers to show advertisements for to each individual can now be decisioned on based on sophisticated strategies and AI. The full fidelity of enterprise data within the firewall can be safely leveraged to power these paid decisions just as they do on owned channels.

Shared marketing components

Pega Marketing includes a core set of Pega-provided marketing capabilities leveraged by every module of the solution that allows marketers to design, execute, deliver, and adapt to marketing strategies. Pega shared components include a consolidated marketer's portal that has customizable dashboards, Offer and Campaign design, treatment design, channel configuration, constraints optimization, and response management.

Analytics-based campaigns

Analytics-based campaigns capabilities include intelligent segmentation that leverages predictive analytics and easy to use visual segments to pick the right variables and profiles and dynamically change them over time based on customer behavior.

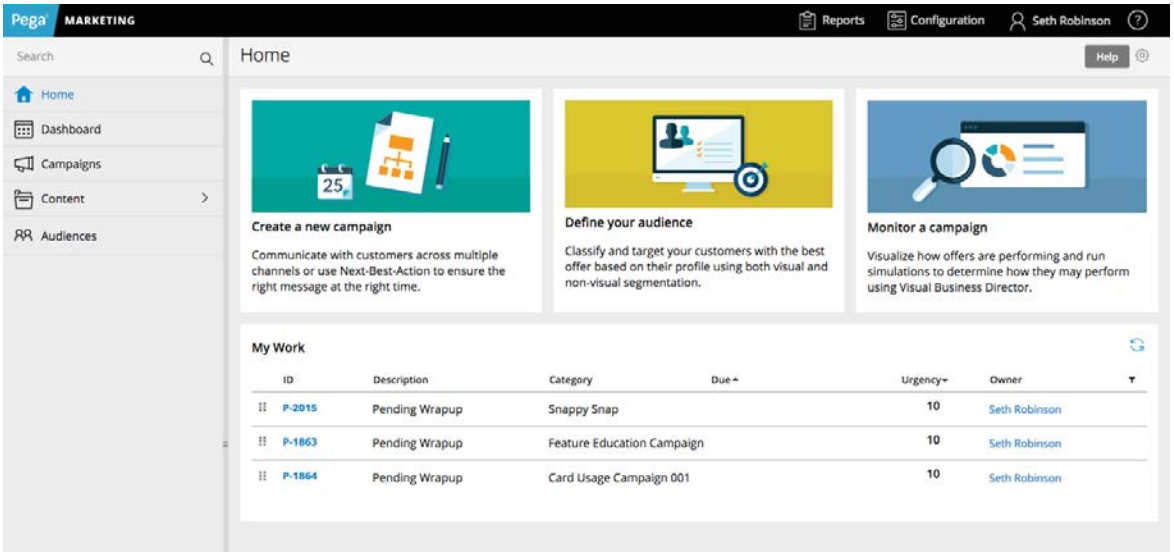
Marketing operations

Pega Marketing operations capabilities include dynamic case management that can orchestrate multiple processes, systems, and people. This allows marketing to adapt to complex business needs. The Marketing Operations module includes checklists for marketers to monitor and control work, as well as several approval templates that can be quickly leveraged in the marketing organization to support financial business objectives.

High-level functionality

Pega Marketing portal

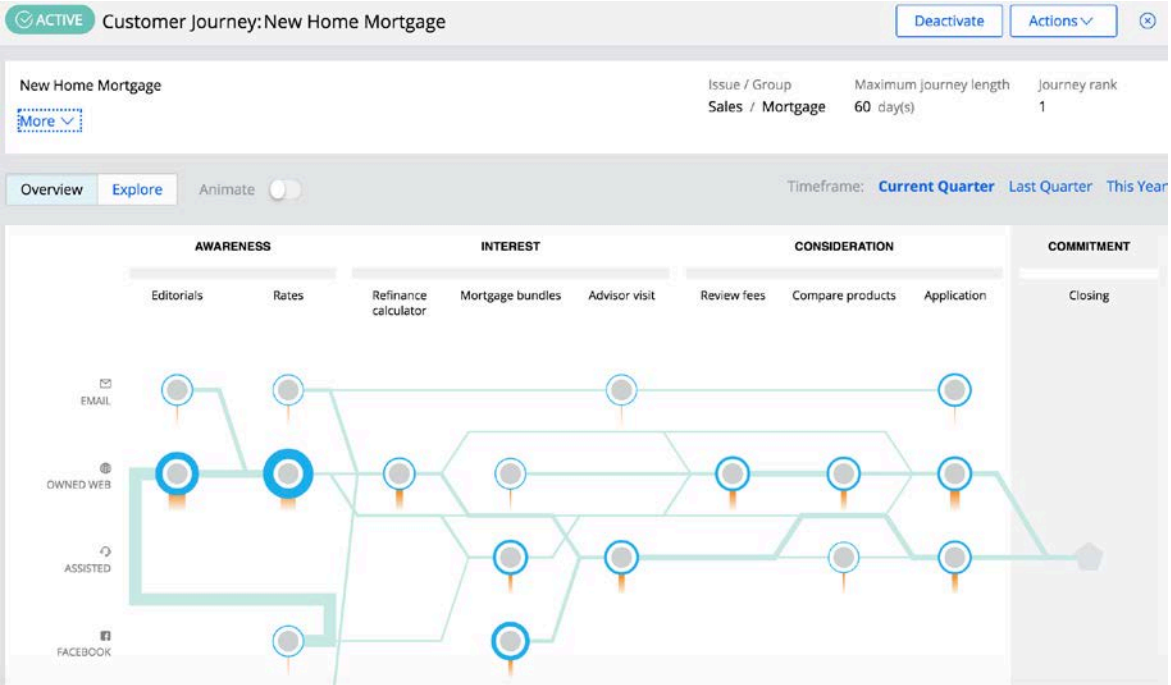
The Pega Marketing portal is specially built for the marketing user and provides the user with quick and convenient access to a wide variety of resources. This portal incorporates a role-based information layout where Analyst, Manager, and Administrator users see appropriate menu items.



Customer journey

A customer journey represents the phases or stages a customer goes through before converting or accepting a specific outcome. For example, a New Credit Card journey attracts customers to sign up for a credit card. A journey is made up of many individual messages and communications such as email, SMS, or paid ads that occur over time.

Customer journey allows users to visualize how customers progress through the journey and determine the most successful messages and channels. This helps identify where resources should be best deployed.

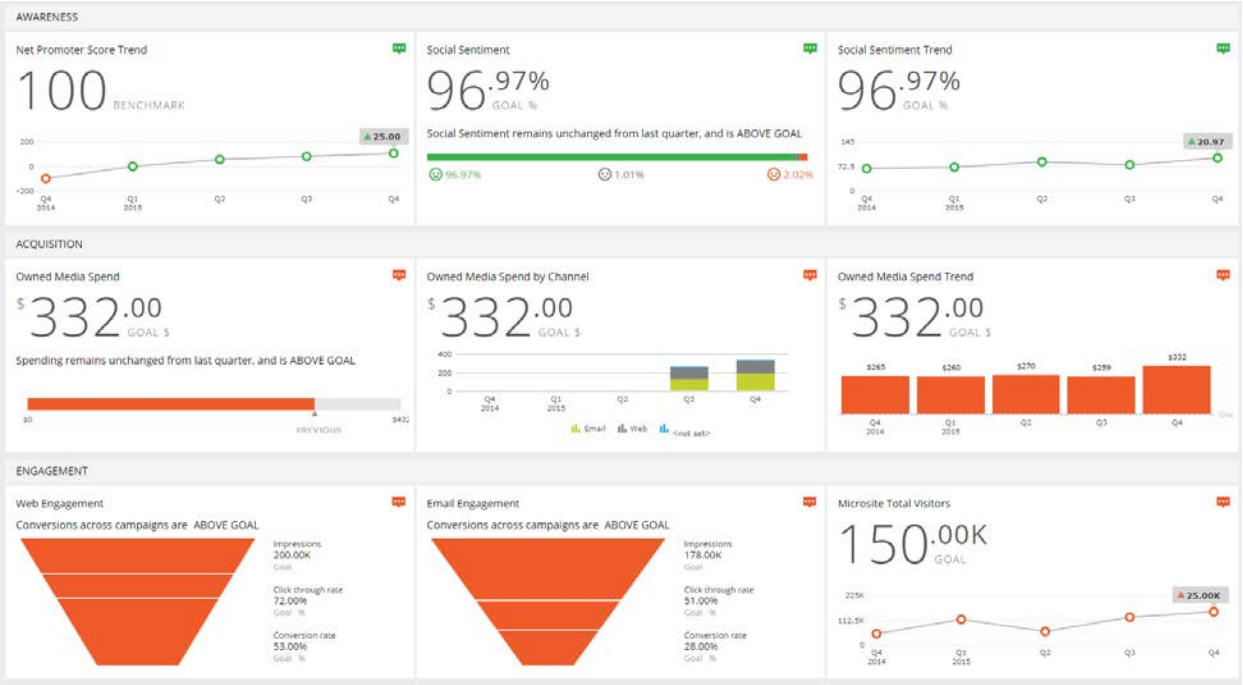


Marketing dashboard

The dashboard allows marketers to view and report on metrics that are important to their efforts, and track the performance of their marketing initiatives.

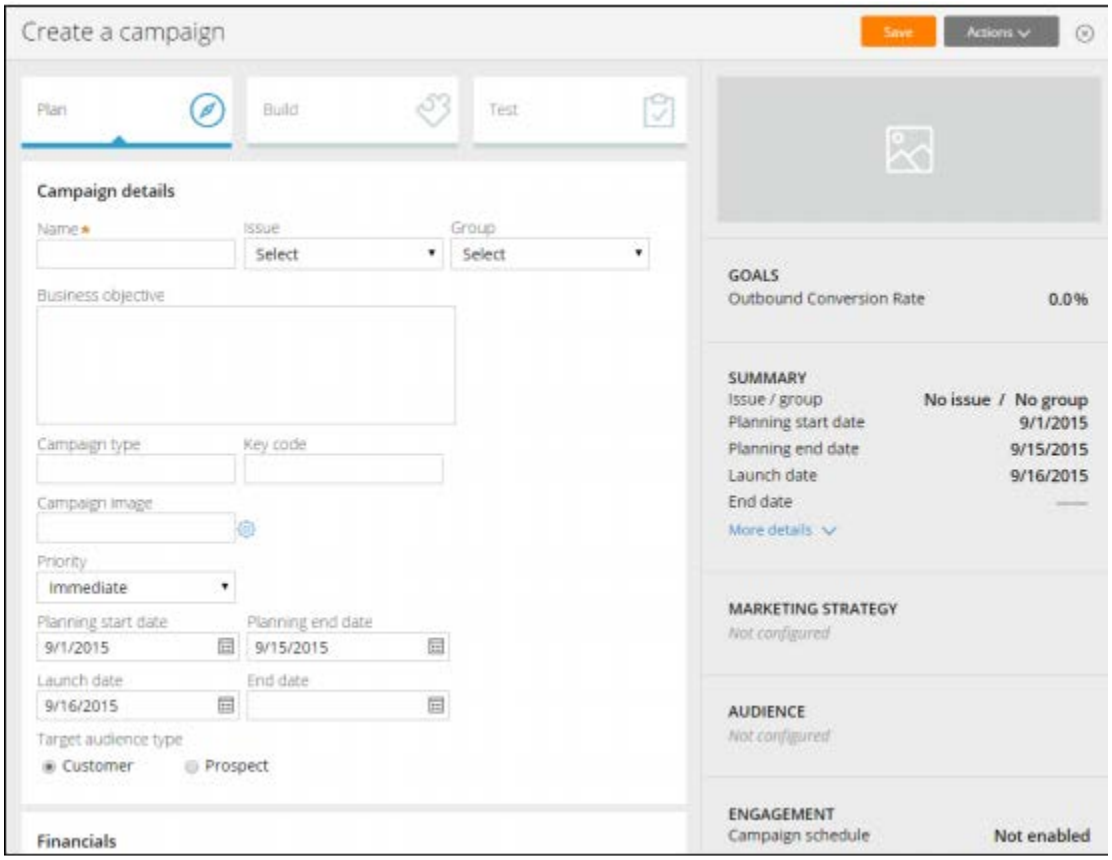
The dashboard framework consists of 20 Pega-provided executive level widgets pertaining to Awareness, Acquisition, Engagement, and Business KPIs. These widgets show current and trending results for the corresponding metric. The dashboard allows the marketer to establish and track goals, and provides customizable insight and recommended actions for each KPI.

Marketers can customize the widgets displayed in the dashboard and configure the goals for each widget. The marketer can also apply different filters to further refine the displayed metric data.

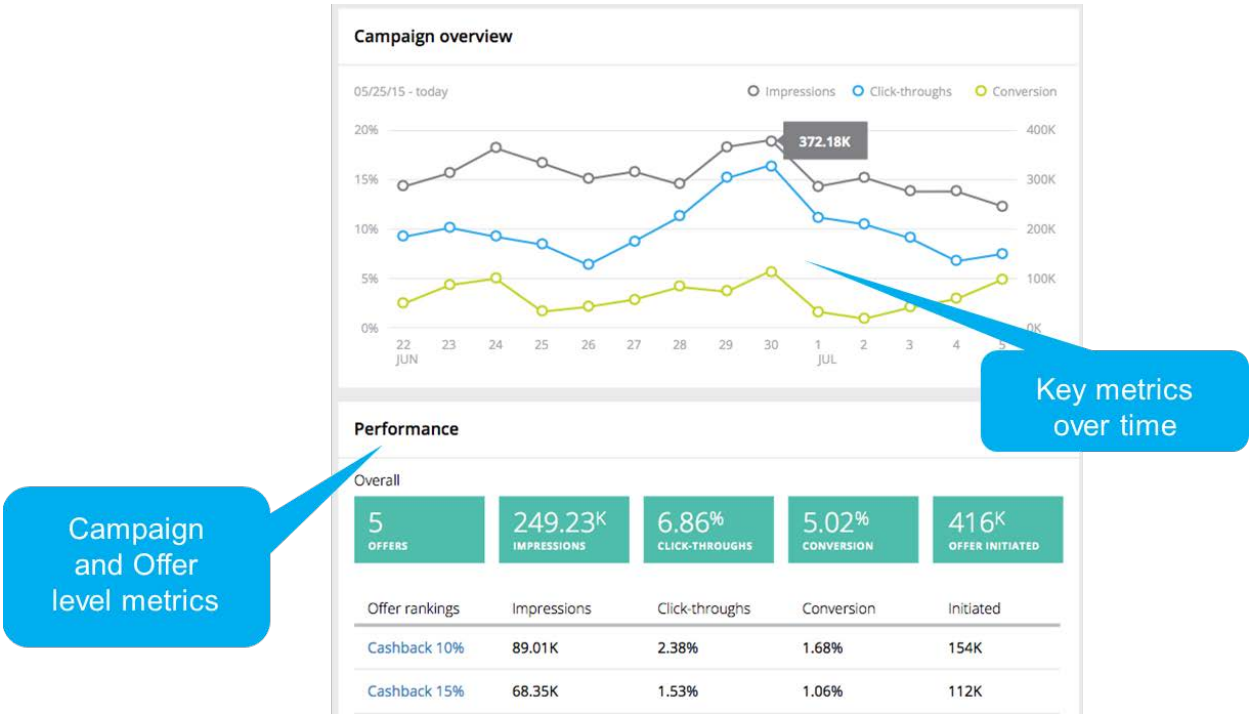


Multi-channel campaigns

Multi-channel campaigns (commonly referred to as campaigns) enable marketers to use the power of intelligent segmentation and analytics to deliver the right offering to the right customer at the right time. Campaigns progress through various stages, such as design, approval, and running. Marketers can specify details, financial information, and goals for their campaigns.

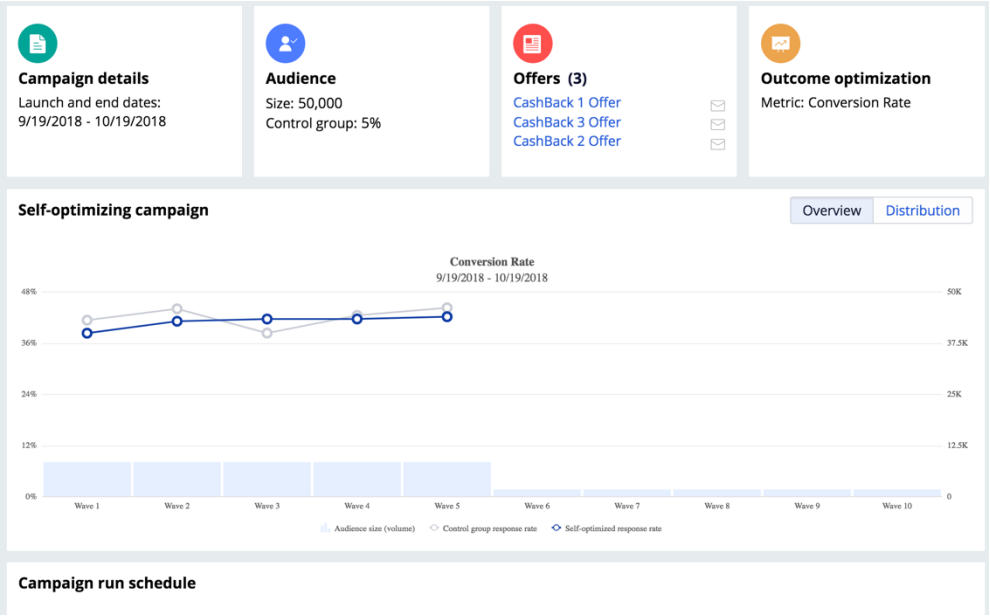


At the campaign level, the marketer can review performance over time, as seen in the following image:



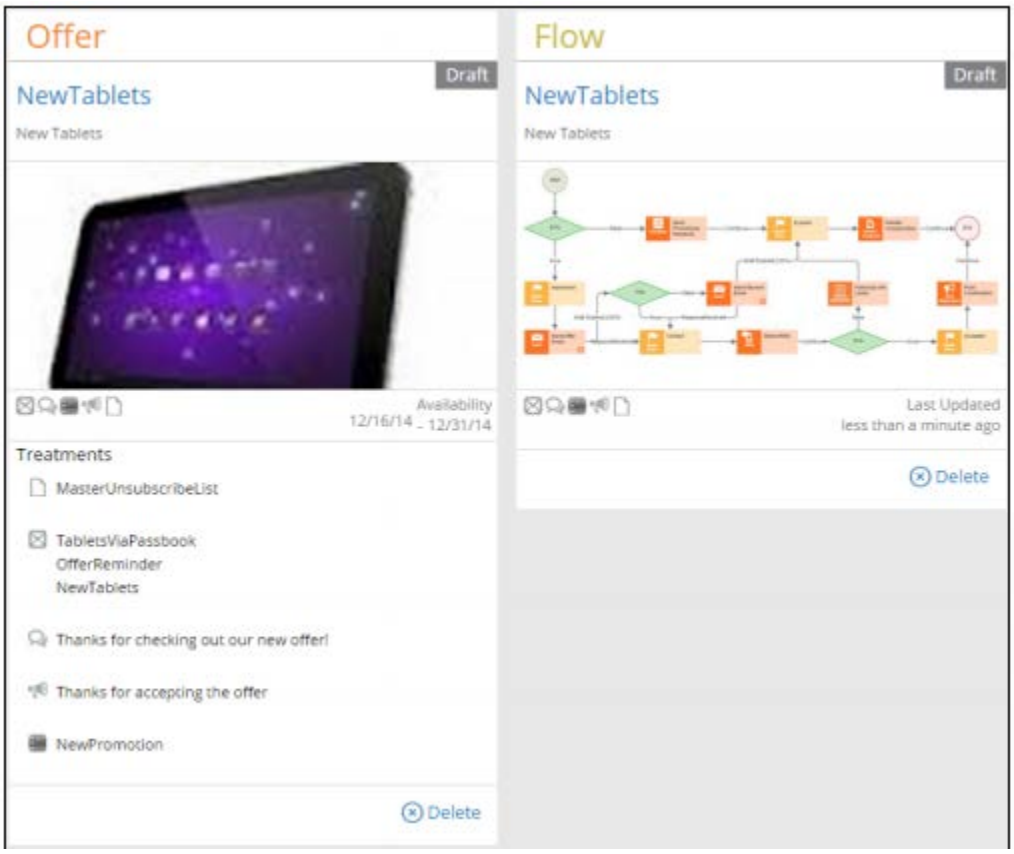
Self-Optimizing campaigns

Self-Optimizing Campaigns provide an intuitive user experience which automates the process of splitting a campaign into a series of experiments or waves and leveraging the power of AI to automatically learn which offers appeal to your customers. By continuously monitoring and applying the learning from previous waves to the next wave, Self-Optimizing Campaigns deliver incremental lift and improved outcomes across the entire campaign.



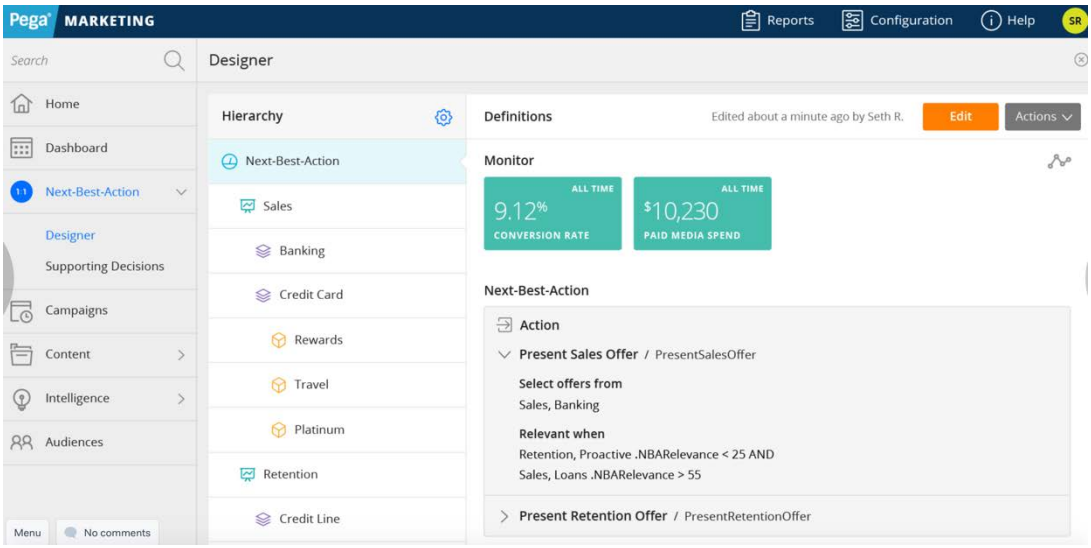
Outbound campaigns

For advanced marketing initiatives, multi-channel campaigns allow the use of adaptive and predictive analytics with business rules to optimize across multiple offers, resulting in the selection of the best offer for each individual customer. However, marketers often need a simpler mechanism to promote a single offering and monitor its performance. The Outbound Campaign construct provides just this functionality using a visual card paradigm that highlights all aspects of the initiative on a single canvas. This allows marketers to focus on key aspects, such as the audience, the offer, and the flow.



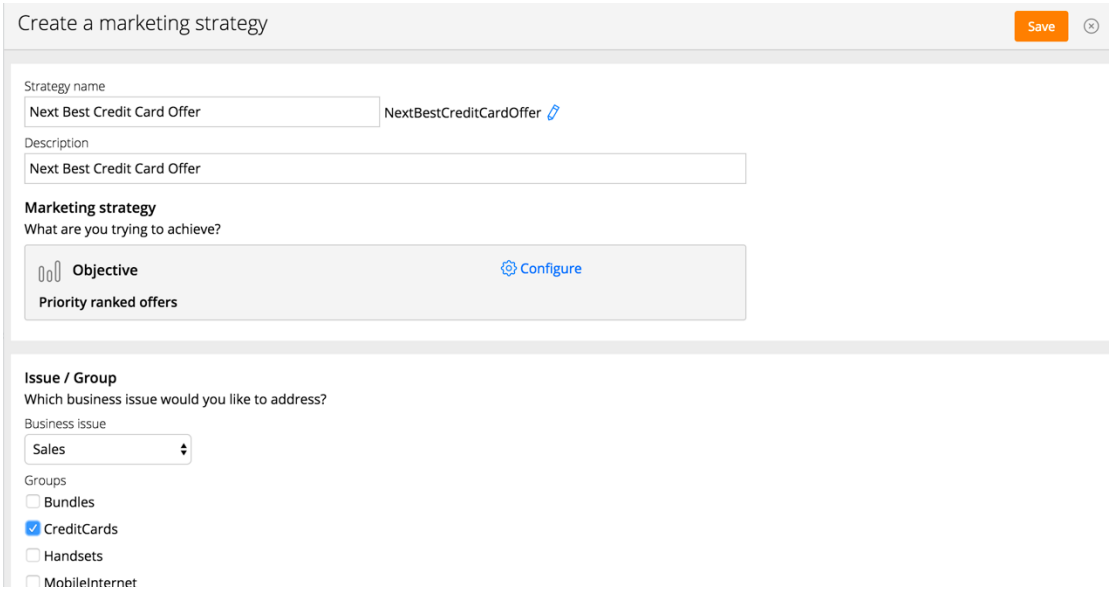
Next-Best-Action Designer

NBA Designer provides a single location for marketers to define and manage their organization's Next-Best-Action framework. This starts with defining the business issues and groups they want to focus on, which becomes the NBA hierarchy. With a hierarchy in place, marketers are free to configure the actions, eligibilities, and offers from the Top-down, Bottom-up or Middle-out. The configured NBA framework can be associated to real-time containers to service inbound channels as well as scheduled for specific outbound interactions.



Strategy builder

Strategy Builder brings an Express like capability to creating and managing decision strategies. Strategy Builder provides a growing list of business objective templates, such as Priority rank offers by segmentation or analytics, calculate customer lifetime value, Offer Prioritization, and Product Bundling. After selecting an objective, users are presented with a set of questions that capture their specific requirements and are used to generate a best practice decision strategy.



Segments

Segments provide the capability to identify a specific group of customers that match some criteria and to use this group as the audience in campaign execution. Segments can also be used within the marketing strategy to decide what offers are made to which customers based on the segments they are in.

Historically, the assembly of criteria to describe a segment has been an area in which the marketer had to rely on intuition, prior complex analysis, or guess work. Pega Marketing solves this using intelligent segmentation. The solution can leverage the power of decision management (in segment criteria) through the use of statistical analysis to discover predictors within the customer data that contribute positively towards a targeted outcome (like the purchase of a product). The solution also uses sampling strategies to optimize the processing involved in discovering these predictors.

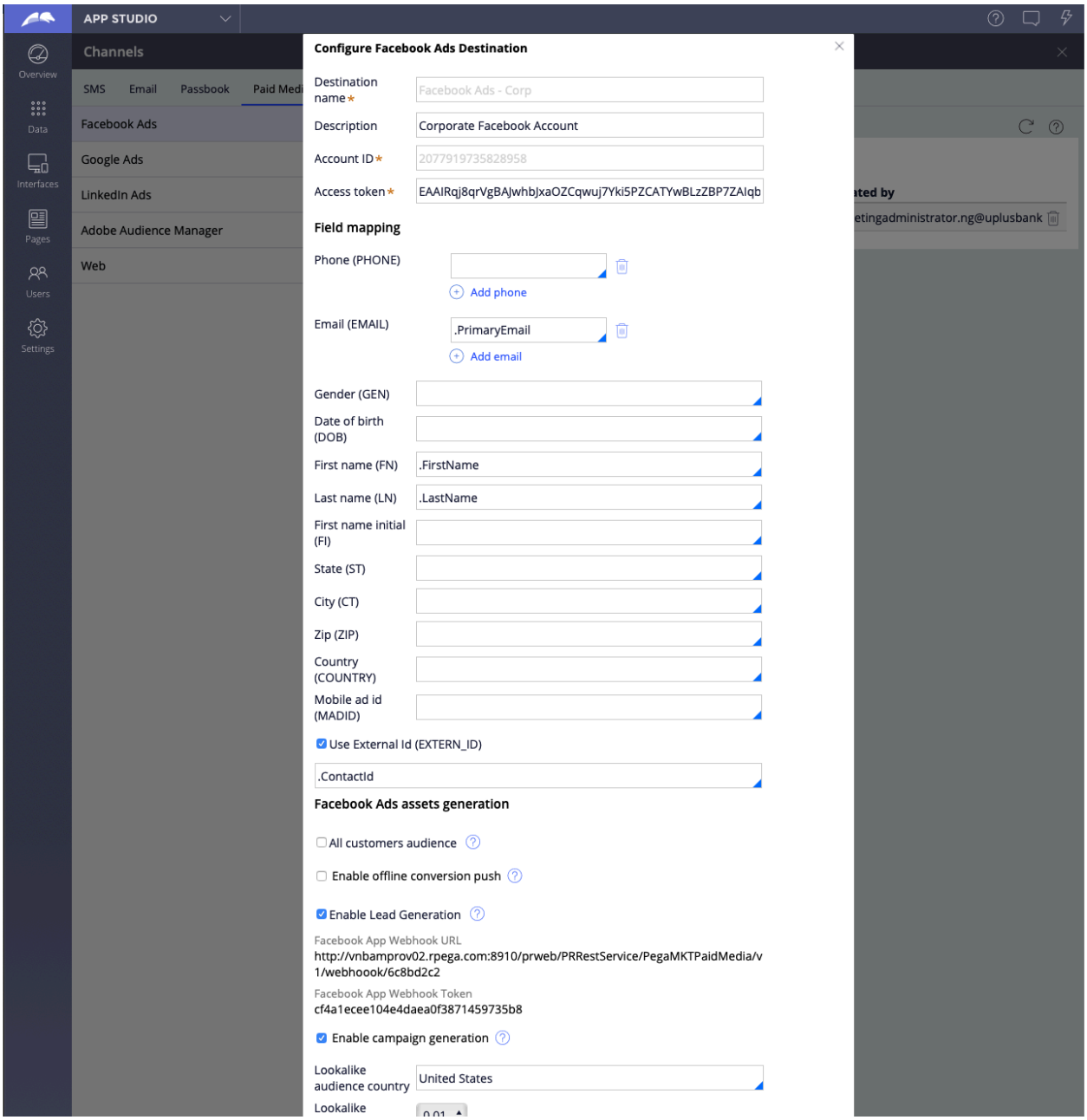
Paid Media Manager

Paid Media Manager (PMM) enables marketers to leverage enterprise data and insights to drive intelligent and effective advertising. PMM is highly integrated with NBA Designer. When an NBA decision is made on what offer or offers an individual is eligible for PMM can then communicate those decisions to ad platforms by placing customers and prospects in the appropriate audiences. Inclusion an audience indicates the offer an individual will be targeted with as well as the bid level.

Historically, these ad decisions were based only on broad segmentation based on anonymous data. With PMM ad decisions can be driven by the full fidelity of your proprietary enterprise data and insights that drive your owned channels. PMM takes a privacy first approach by only communicating the decision over the firewall to ad platforms. The backing enterprise data and AI-based insights stay safely within your firewall.

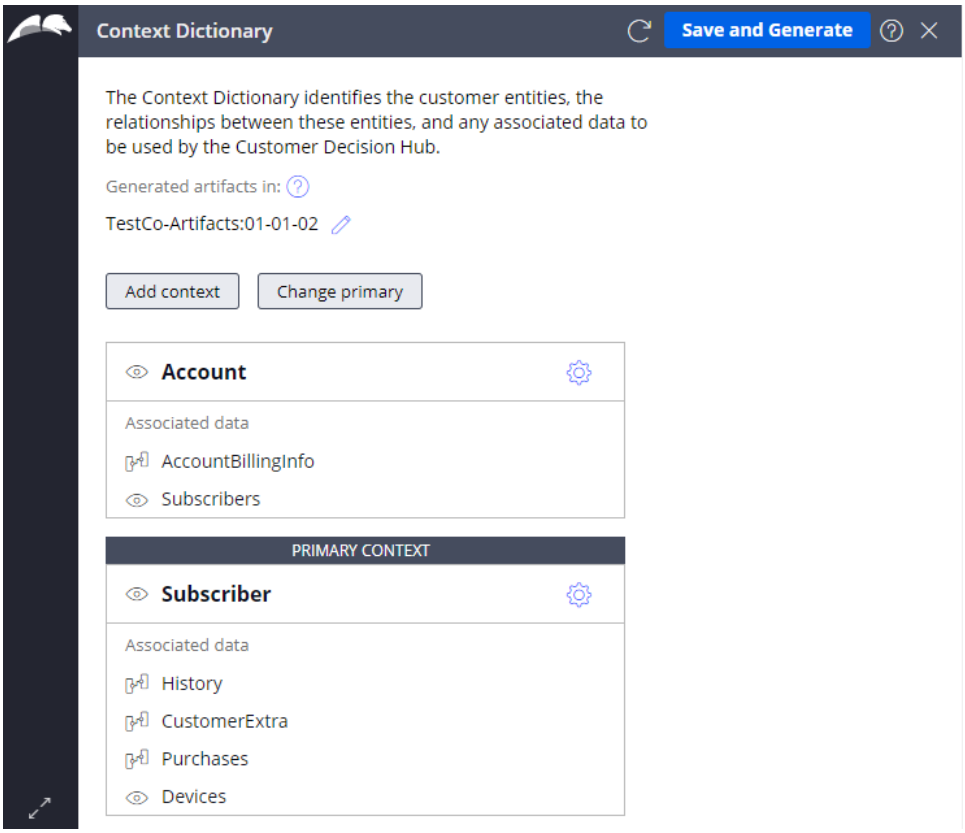
These decisions can be communicated by leveraging direct CRM server-to-server APIs to Google Ads, Facebook Ads, and LinkedIn Ads. Traditional pixel-based APIs are also supported Adobe Audience Manager as well.

PMM also enable segments to be communicated safely and securely to ad platforms using these same paid channel integrations.



Context Dictionary and context switching

Easily switch contexts to engage households, customers, and accounts alike. The Context Dictionary provides an intuitive means to model customer entities including customer, prospect, and associated data. Segments and Campaigns allow for selecting the appropriate context. Strategy Canvas supports switching contexts, simplifying strategy configuration.



Control groups

In an experiment, a control group is a group, separated from the rest of the experiment, which is isolated from the variable being tested. In marketing, control groups can be used to assess the performance of marketing initiatives.

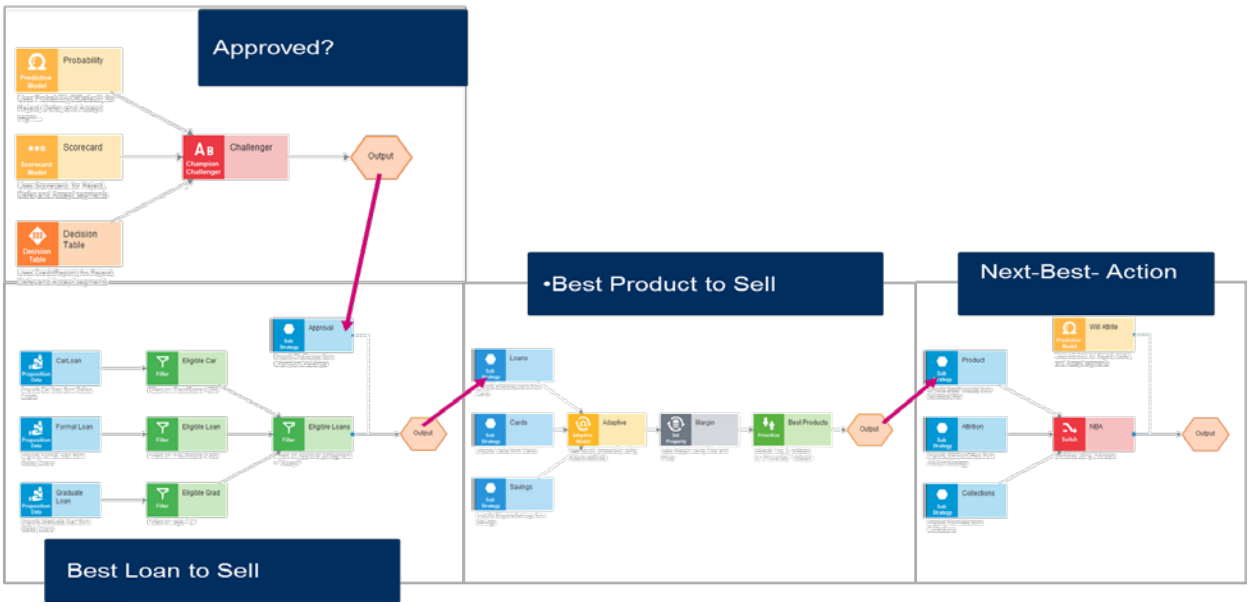
Pega Marketing provides support for defining and populating control groups. In addition, the strategy rule also provides support for assessing whether a customer is in a control group. This allows the user to treat control group members differently. For example, control groups members might not receive an offer.

Strategies

A marketing strategy enables the user to match the offers that are available for a campaign to the customers in the target population.

Pega offers a rich visual capability to design sophisticated decisioning strategies to drive intelligent decisions, alerts, recommendations, and next best actions. This allows the business to “mind map” their customer interaction strategies in this higher level “strategy sketch pad.”

Strategies ensure that each customer is targeted with the offer that is most suitable for them. The strategy rule enables the user to apply various business goals and prioritization criteria to make this determination. An example of a hierarchy of strategies is shown in the following screenshot.



Contact policies

Contact Policies provide a mechanism for controlling and restricting how many times a customer is contacted in accordance with corporate and/or regulatory guidelines. A single policy can contain the contact limits for multiple channels of communication. Each contact limit is applicable over a specified time (e.g. weekly, yearly, etc.). Furthermore, the contact policy can be disabled, enabled only for a specified date range, or always enabled.

Volume constraints

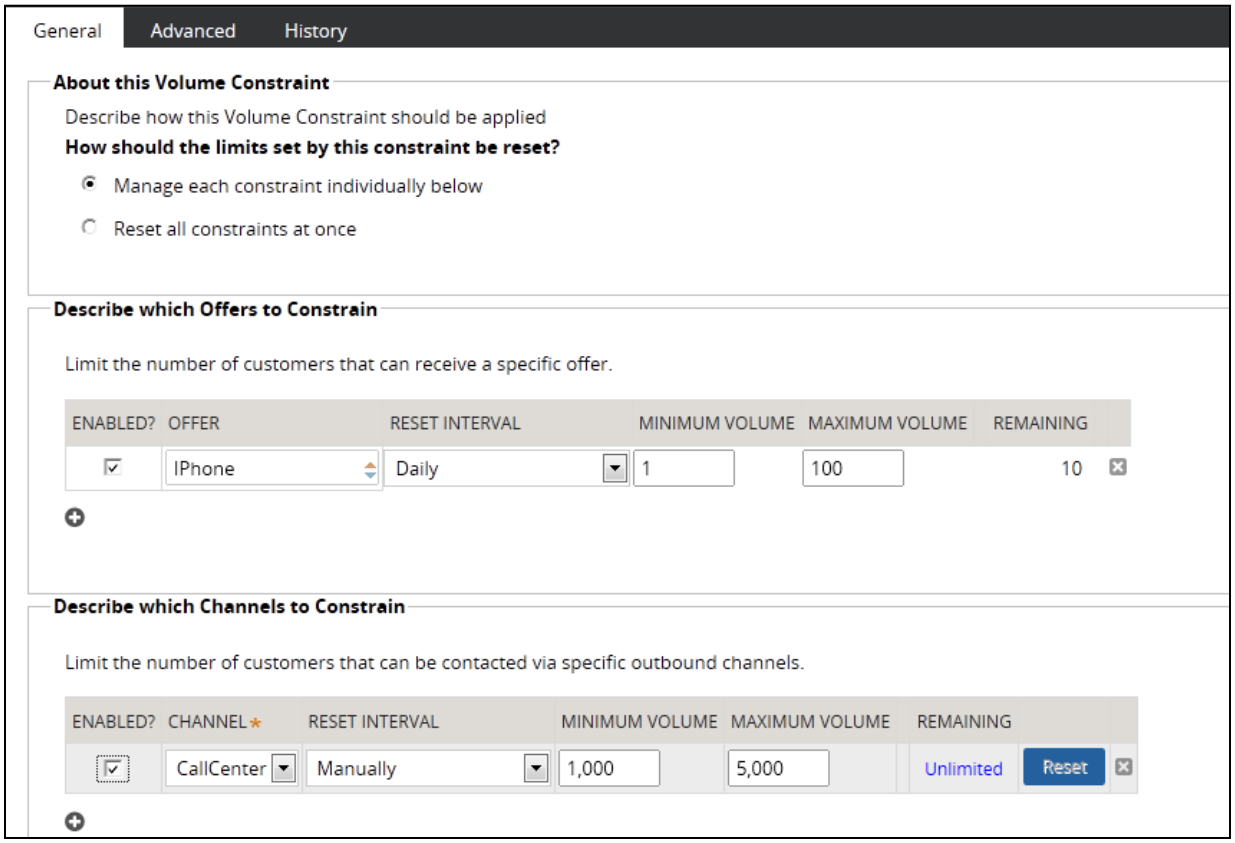
Volume constraints allow marketers to maximize the return on their campaigns—in terms of response or profit—under specific offer or channel constraints. Pega Marketing provides constraint optimization that can be used when there is a finite amount of offers available or a capacity limit to be managed for a given channel. The following two constraint types are supported.

Offer constraints

Offer constraints allow the user to specify the maximum and/or minimum volume for an offer. This is useful in situations where there is only a limited quantity available for a product.

Channel constraints

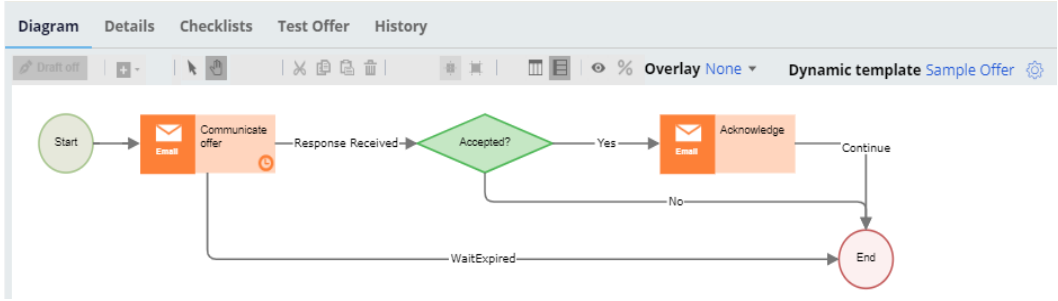
Channel constraints allow the user to specify a maximum and/or minimum value for a delivery channel (e.g., Email, SMS, etc.). This is useful in situations where there are limitations on the delivery mechanism, such as SMS or email server throughput.

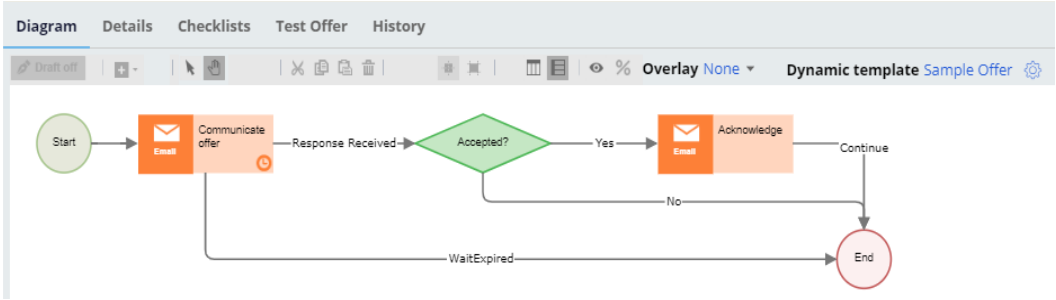


Offers

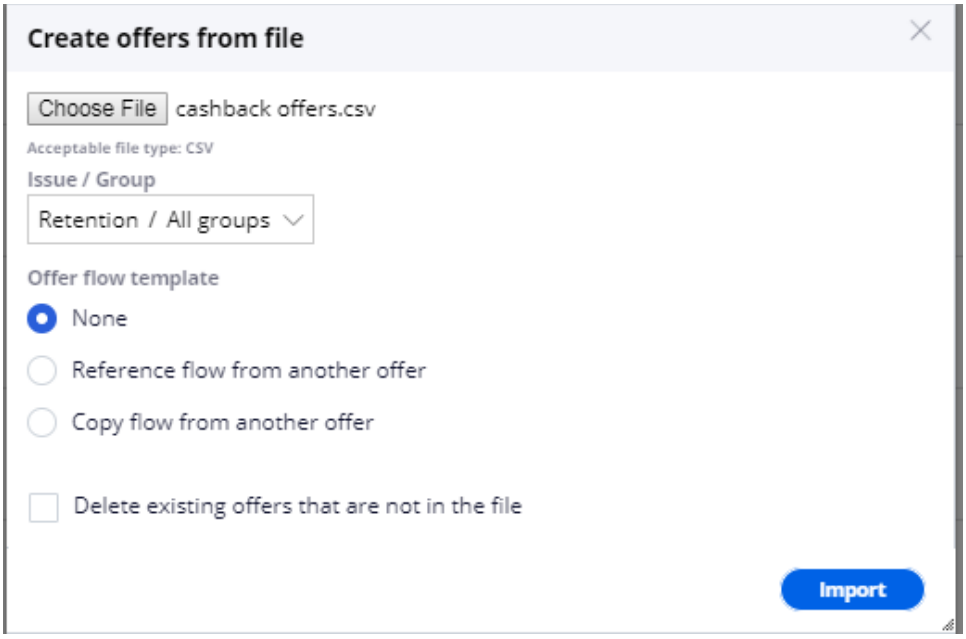
An offer is the marketing manifestation of a decisioning proposition. The proposition holds various details about an offering, such as Start Date, End Date, and Expected Revenue. In addition to the proposition data, the offer rule enables the marketing user to visually specify the sequence of communications (i.e., the Offer flow) for a proposition. The Offer flow enables marketers to communicate their multi-stage offerings across multiple channels using configurable shapes, such as Email, Wait, and Hand Off.

These capabilities allow a business user to fully define propositions using multi-channel communication strategies, visual treatments, and the business logic to determine when and how to present to a customer. This will greatly reduce the time it takes to get new offers to market in any channel, including inbound or real-time channels. The Offer flow editor provides the user with an intuitive drag-and-drop mechanism for designing their offerings.



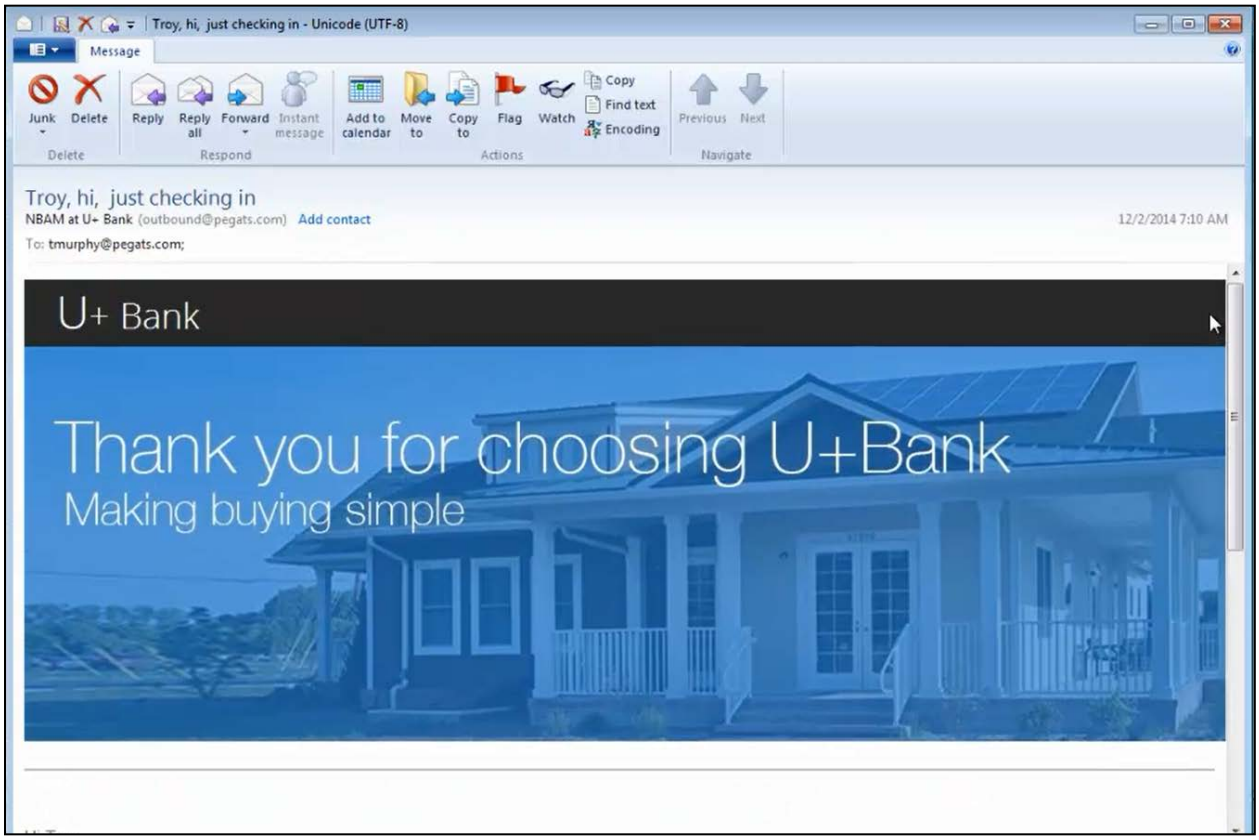


The option to create offers from a file further streamlines the offer definition process. The newly created offer's flow configuration can be copied from another offer or shared with another offer.



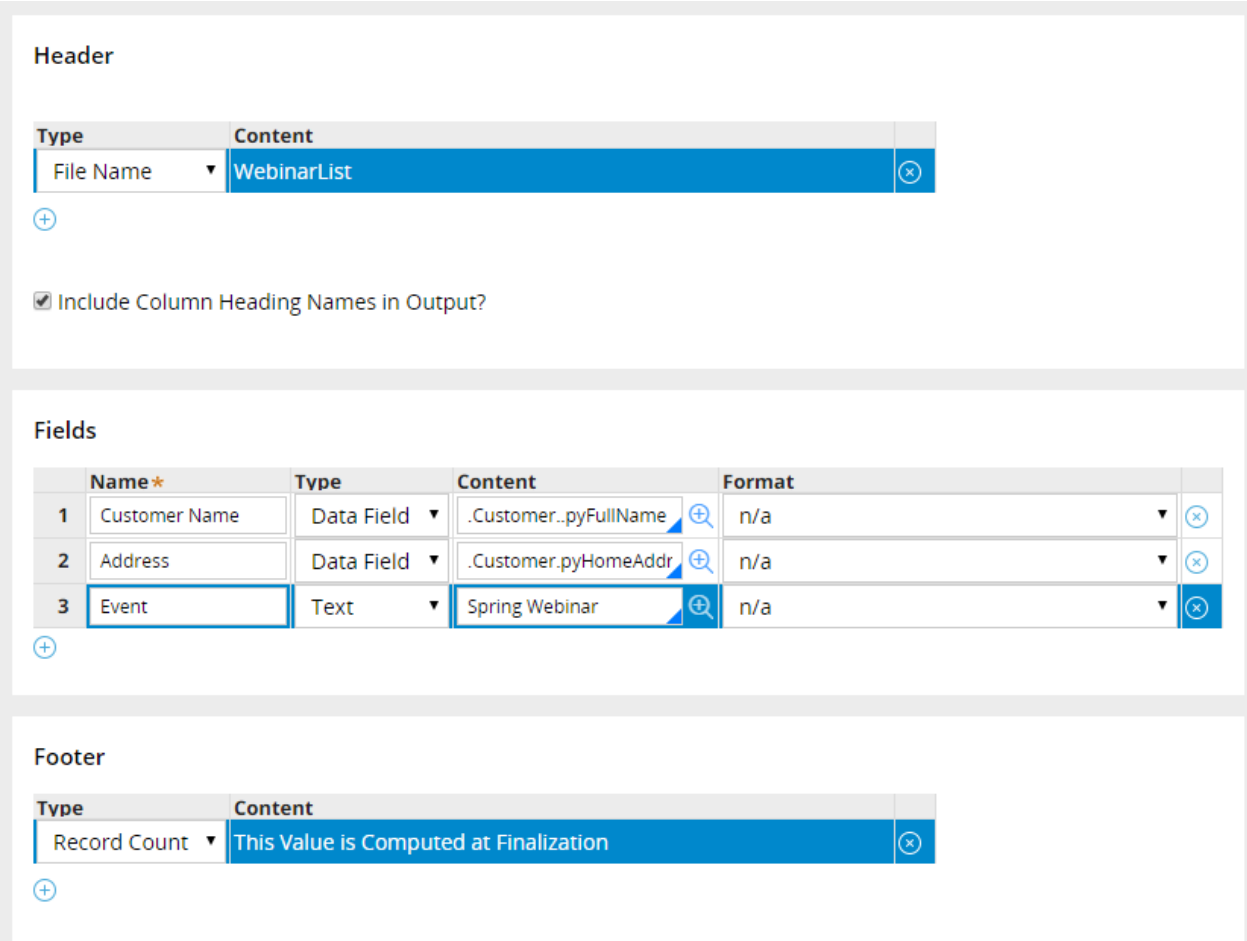
Treatments

A treatment is the definition of the content that is delivered to a customer as part of an offer over a specific communication channel. The system provides support for four kinds of treatments: Email, Passbook, Section, and SMS. An example of an email treatment is shown in the following screenshot.



Templates

A marketing template is the definition of the content that should be written to an external source as part of making an offer. The system provides support for writing to both a file and a database table. Any outbound shape in the Offer flow can be configured to write to a File Template and/or a Database Template.

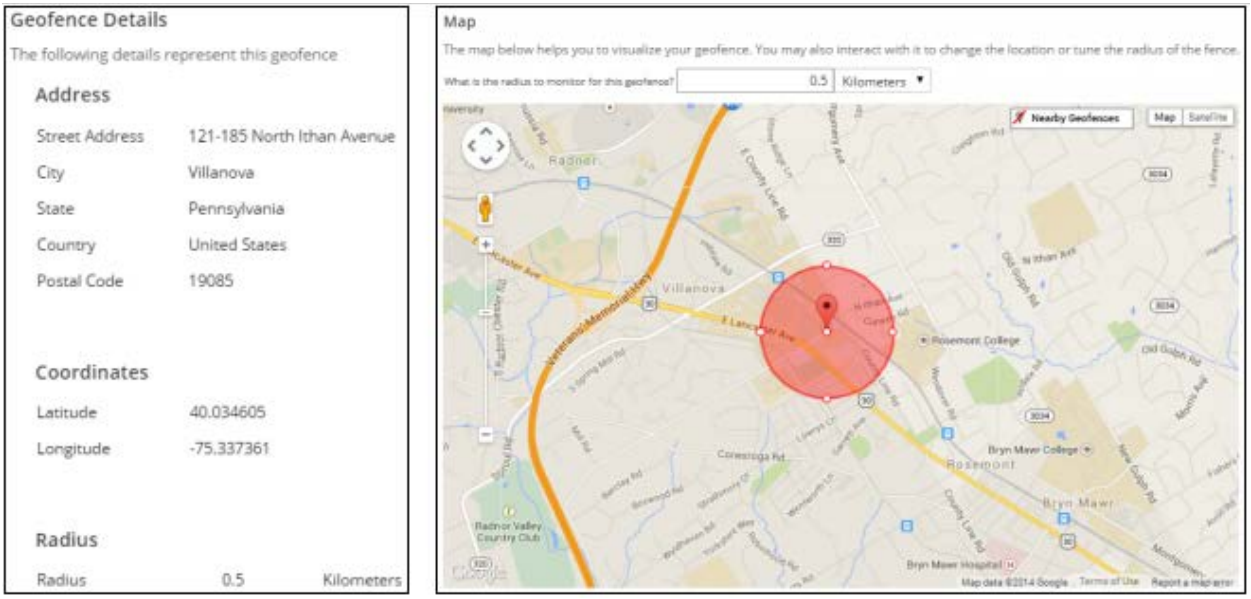


Microsites

A Microsite is a collection of one or more pages that can function as a standalone entity. Microsites can be standalone or can be embedded into existing websites. They can be used for various marketing purposes, such as product announcements and lead generation.

Geofences

A Geofence is a virtual boundary around a location. Marketing users can define Geofences in the system and then use them to trigger events. For example, a customer entering (or nearing) a store could trigger the Geofence for that store. This could in turn trigger an event whereby the customer is presented with an appropriate offer. Users can also reference Geofences in strategies and can harness this to determine the most relevant offer for a customer.



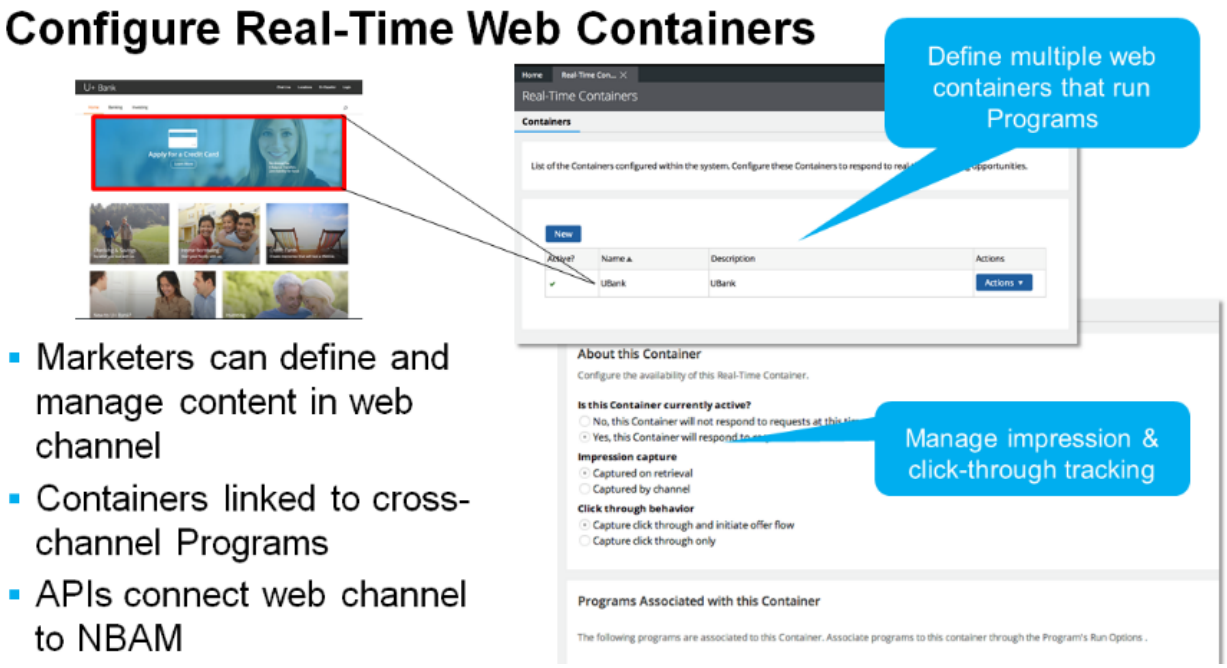
Real-time events

Events provide a mechanism for responding to real-time marketing opportunities. An event is, essentially, an entry-point into the marketing application which can be initiated by internal or external systems. Events can be mapped to multi-channel campaigns and can trigger their execution.

Real-time containers

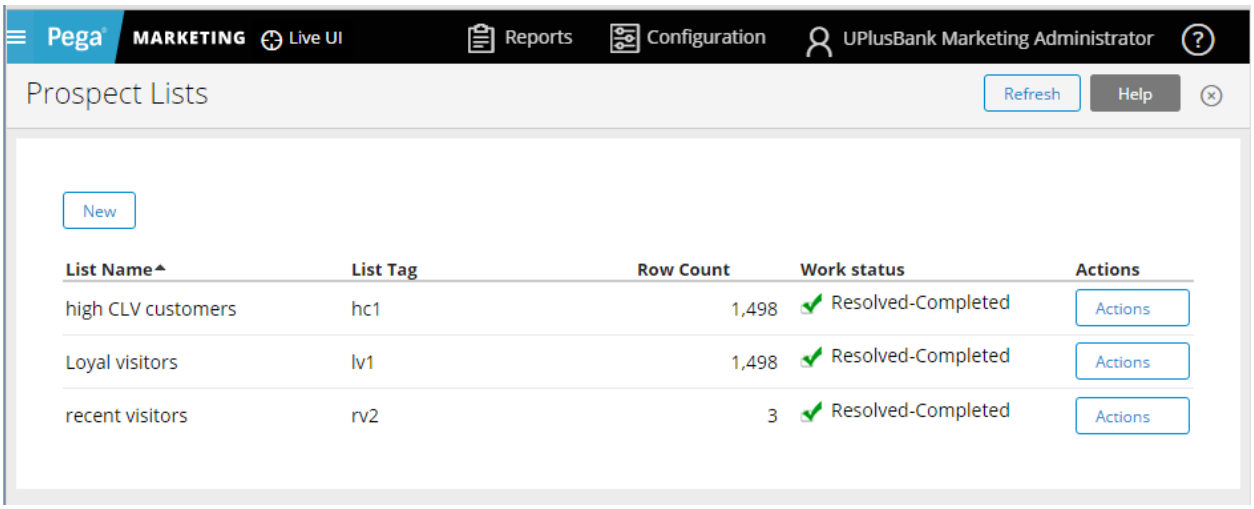
Real-time containers provide a way for marketers to manage content that appears in other non-agent assisted real-time channels, such as web and mobile. As an example, a marketer may define a container to represent a region of a web page. They can then associate the container with a campaign. When the container is loaded, the associated campaign is executed, and the container gets populated.

Pega Marketing provides a set of APIs, which can be invoked from real-time channels, to facilitate the population of a container and to capture customer responses.



Prospects

In marketing terms, a prospect is a potential customer, which the marketing user wants to target. Pega Marketing provides support for importing Prospect Lists, creating Prospect Segments, and targeting prospects via campaigns.



Seed lists

A seed list is a collection of artificial entities (also called “seeds”) that can be used to test, monitor, and validate various aspects of the processing infrastructure. For example, such a

list can be used to test the timeliness and reliability of processes being handled by a third party.

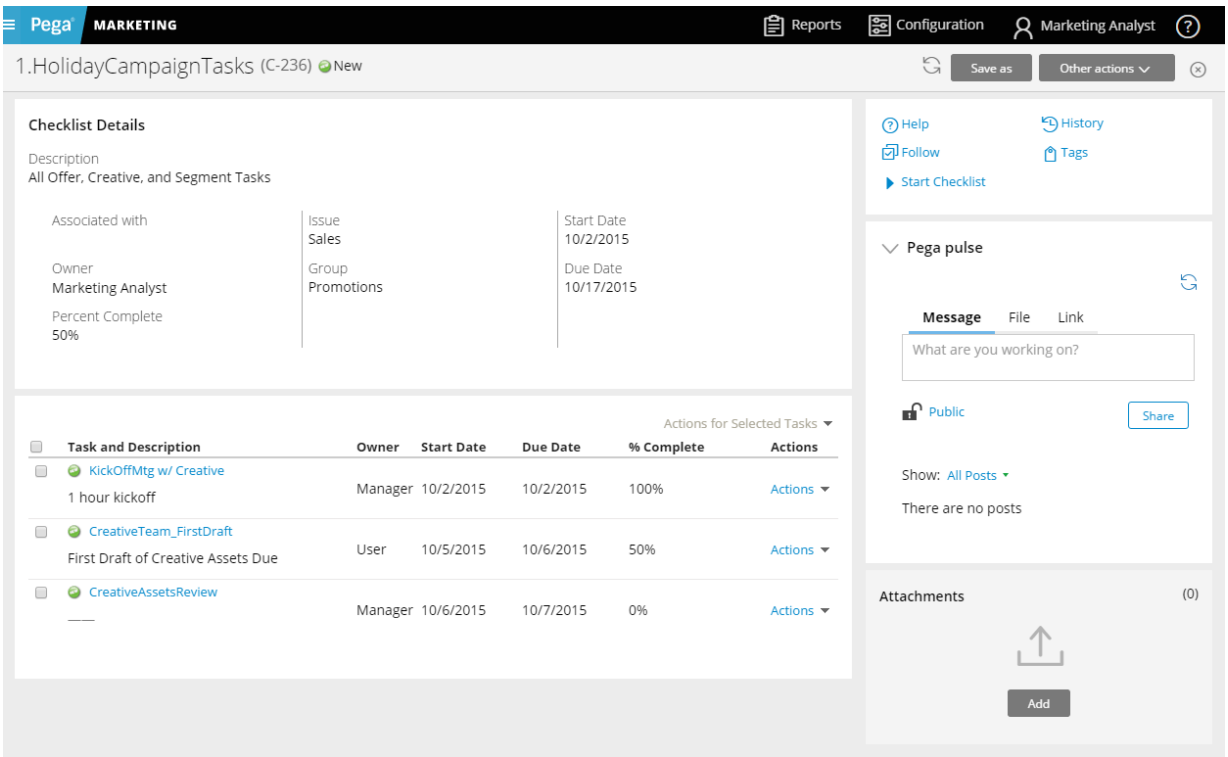
Each seed represents a make-believe customer and all applicable customer attributes can be specified for a seed. Multiple lists, each containing their own seed data, can be created and managed within the marketing application.

Data management

Marketers can view and manage customer and related data through Data Management landing pages. The landing pages allow marketers to import new or updated customer information. The Data Management landing pages also support custom views of your data.

Checklists

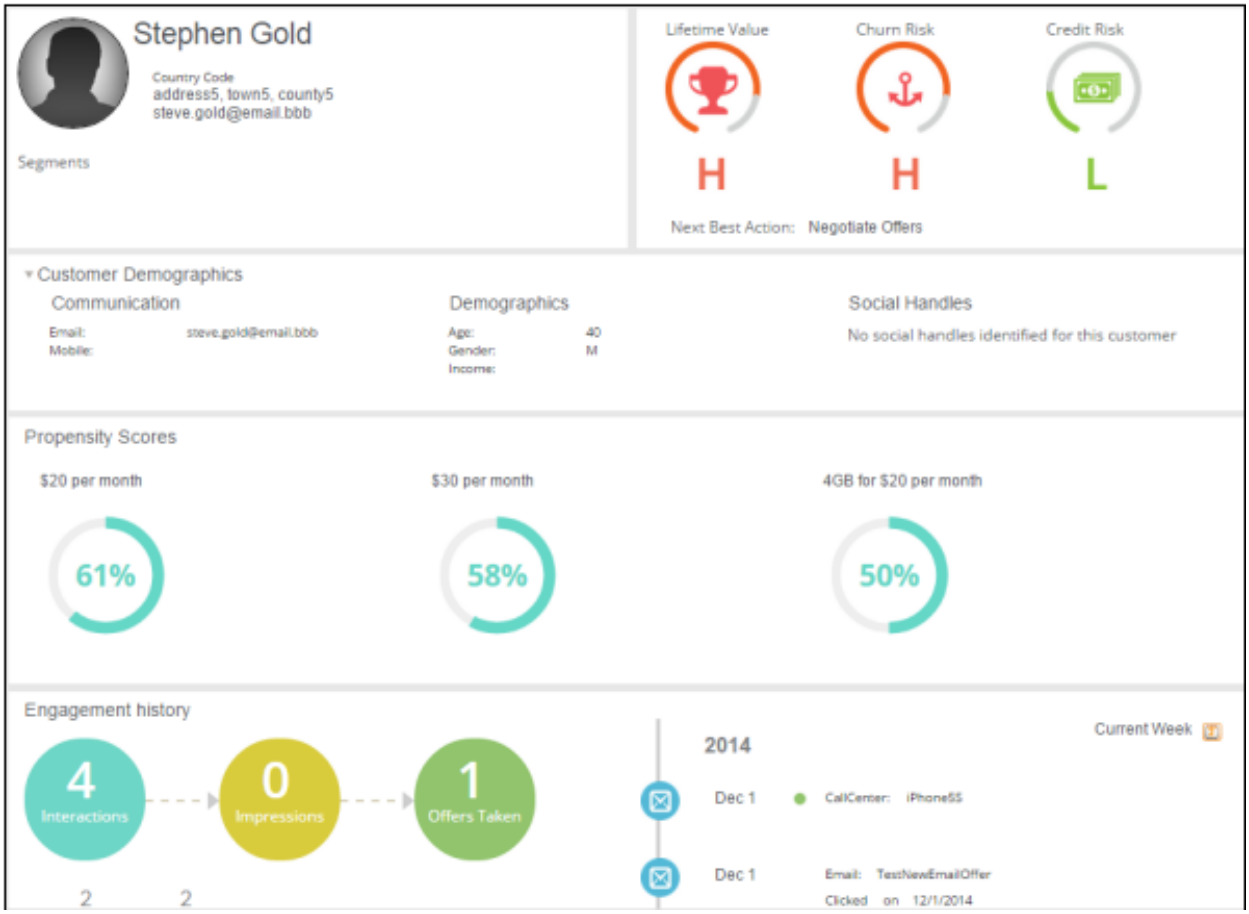
A checklist represents a set of actionable steps which must be performed to accomplish a goal. A Checklist Task represents each actionable step. A checklist can be associated with either an offer or a campaign.



Customer profile

Customer profile is a way of describing a customer categorically so that they can be grouped for marketing purposes. This includes a set of characteristics that identifies the

customer and their value to the organization. This profile also includes a quick glance of the interaction between the customer and the organization.



Revision management

Revision management is a Pega Platform feature that enables business users (such as marketers) to take ownership of parts of the enterprise application. Marketers can make controlled changes in the business sandbox and test these in production within the boundaries defined by IT.

Identity matching

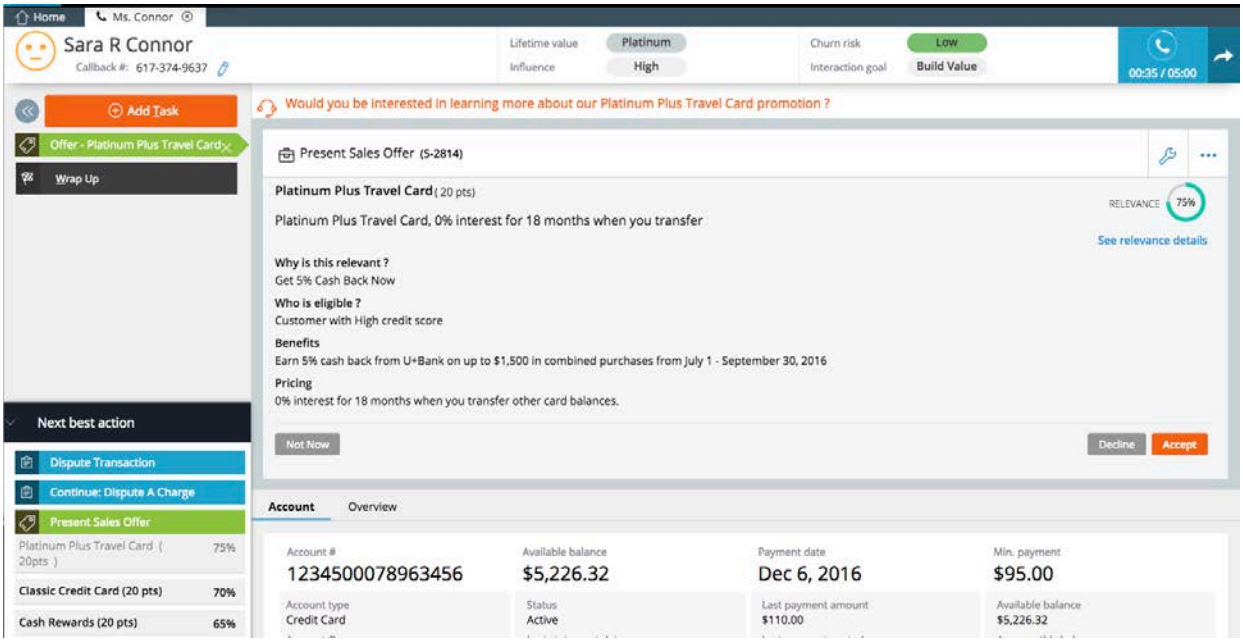
Identity matching is a feature that allows a Pega Marketing application to identify individuals across their addressable devices. This feature also enables a seamless transition between an anonymous individual and a recognized customer.

When an individual is anonymous (e.g., not logged in), relevant information is captured during their various interactions with the application. This information can then be utilized to determine the Next-Best-Action for this individual. When the individual authenticates

themselves as a customer, their anonymous interaction data is merged with their previous interaction history. This allows the marketing application to maintain a complete view of the customer journey.

Next-Best-Action Advisor

Built for marketers responsible for managing inbound customer communications and experiences, the Next-Best-Action Advisor (Advisor) solution provides features to rapidly create and configure intelligent customer interactions that drive sales, reduce customer attrition, and maximize the customer experience in inbound channels such as Call Centers and Web. By continuously assessing everything known about and said by the customer, Advisor allows marketers to create intelligent, optimal, and personalized offers for customers, balancing customer needs against internal objectives, such as customer spend and customer risk.



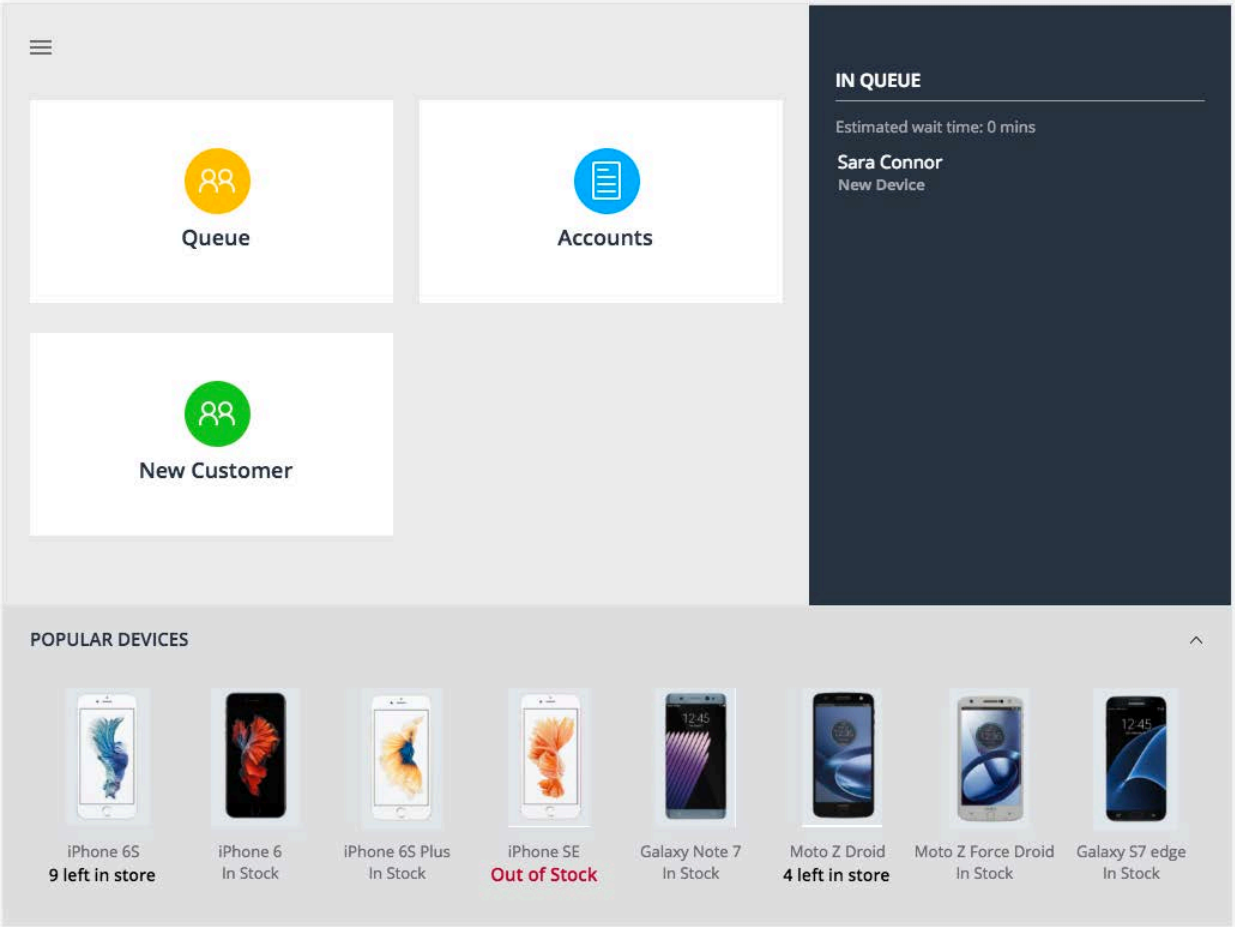
Advisor combines sophisticated adaptive analytics and real-time decisioning in a solution that guides service representatives and customers through individual offer management strategies. Advisor supports cross-sell/up sell, retention, education, risk, and many other areas across marketing and service. Advisor includes pre-built components and best practice offer presentation templates for use in contact centers.

Advisor may be deployed within Pega unified service desktop or easily integrated into a third-party solution, so that you can:

- Drive ROI by dynamically bundling propositions to determine value-sensitive financial objectives, and optimizing time spent on calls and money spent on incentives.
- Increase satisfaction by easing agent workloads and delivering critical information that meets customer needs, captures customer reactions, and immediately reflects this in offers.
- Empower the business by enabling managers to track everything in real-time and adjust thresholds on incentives, and by reducing time-to-market with configurable UI panels and decision strategies.

Retail Advisor

Retail Advisor is a unified CRM tablet application that provides Sales, Service, and Marketing capabilities to employees in retail locations. Specifically designed for use on a tablet device, Retail Advisor frees employees from desktop terminals, allowing them to focus on delivering a personalized experience. From greeting customers and answering their immediate questions on their account, checking store inventory, and promotions to configuring a personalized bundle based on their individual needs, Retail Advisor is there to keep your customers coming back.


Queue
Accounts
New Customer
IN QUEUE
Estimated wait time: 0 mins
Sara Connor
New Device
POPULAR DEVICES
iPhone 6S
9 left in store
iPhone 6
In Stock
iPhone 6S Plus
In Stock
iPhone SE
Out of Stock
Galaxy Note 7
In Stock
Moto Z Droid
4 left in store
Moto Z Force Droid
In Stock
Galaxy S7 edge
In Stock

Processes and reports

Next-Best-Action Advisor use cases

Use case	Description
Capturing a Customer's Intent	Identifying the reason or context for a conversation with a customer is important for making the best possible decision. For example, a customer may have a high propensity for a cross-sell but because they are calling about a service issue you want to defer this conversation. Next-Best-Action Advisor (NBAA) presents a list of potential reasons a customer could be contacting which are used as inputs into the real-time NBA decision.
Identifying the Next Best Action For a Customer	Determine and present the single best action an organization can take for a specific customer at the moment of interaction. This includes arbitrating across multiple business issues such as Retention, Servicing, Sales and Education.
Assessing the Next Best Offer (NBO) for a Customer	A part of the overall Next-Best-Action, Next-Best-Offer (NBO) determines and represents the best sales related offer for a customer. This ranked offer decision is based on known customer demographics, customer value, customer intent, history, behavioral information, and predicted propensity towards an offer.
Bundled Offers for a Household or Business	Recommend the best offer or bundle of offers for each individual within a household or business or for the business as a whole. Users are able to switch between the household members or business accounts to configure individual bundles.
Create a Personalized, Guided Customer Interaction Script	NBAA presents interaction scripts that guide an agent through a dialog with the customer, ensuring that the conversation is initiated in a consistent and personalized manner.
Present Intelligent and Relevant Offers	Businesses can group and present offers to customers or agents in ways that simplify viewing enabling them to interactively select and compare the choices to negotiate a personalized deal.
Needs Assessment	NBAA presents a set of questions that capture additional information that is used to further refine the offer and bundle recommendations.
Investment Budget	In the Retention context, NBAA calculates the level of churn risk, the customer value and the amount of money to invest in saving a particular customer. This budget amount is calculated in real-time for each customer.

Pega Marketing interaction types

Interaction type	Description
Create a Campaign	Pega Marketing supports multi-channel, multi-wave, and simple direct campaigns. Marketers can specify goals, financials, and budget for their campaigns.

Interaction type	Description
Perform Distribution Testing	Pega Marketing allows campaigns to be run in test mode, thereby enabling the marketing department to validate the right offers are being made to the right customers.
Perform Seed List Testing	Pega Marketing allows Campaigns to be run against a set of artificial entities (also called "seeds") in order to validate the end-to-end behavior of the Campaign.
Submit for Approval	Pega Marketing's Operations module allows Campaigns to go through an approval process prior to being submitted for execution. This enables marketing organizations to adhere to best practices around approvals.
Manage Campaign Life Cycle	Pega Marketing allows the marketer to perform relevant actions (such as edit, suspend, and resume) on the campaign during the course of its life cycle.
Create Checklists	Pega Marketing's operations module provides the ability to create checklists which can be associated with a campaign or an offer. Each checklist contains tasks which describe the actions that need to take place in order to consider the work on this asset to be complete.
Import Prospect Lists	Pega Marketing allows marketers to import prospect spreadsheets into the system and utilize the imported lists to target prospects.
Set up Seed Lists	Pega Marketing enables creation of lists containing examples of customer data. Marketers can use these lists to validate the behaviour of their campaigns and offers prior to making these assets live.
Review System Health	Pega Marketing provides a centralized utility that performs a self-diagnosis of the marketing application and provides system administrators with links to areas that need attention.
Configure Channels	Pega Marketing provides robust support for a variety of communication channels, including Email, SMS, Passbook, and Push Notifications.

Pega Marketing reporting functionality

Report	Description
Interaction History	Provides reports and charts detailing the accept rate, the volume by channel, the volume by proposition, and recent Interactions.
Adaptive Models	The models overview displays a visualization of all adaptive models from the system. It allows the comparison of models in terms of success rate and performance. The predictor overview visualizes predictor performance and allows analysis of predictor use across models within Adaptive Decision Manager (ADM).
Visual Business Director	Provides access to VBD data sources, KPIs, and views.
Marketing Profile	Enables marketers to probe the customer base and view how Decisioning sees the customer: the profile displays their demographics, their segment membership, their key measurement points (such as life time value, churn risk, and credit risk), and their recent interactions.

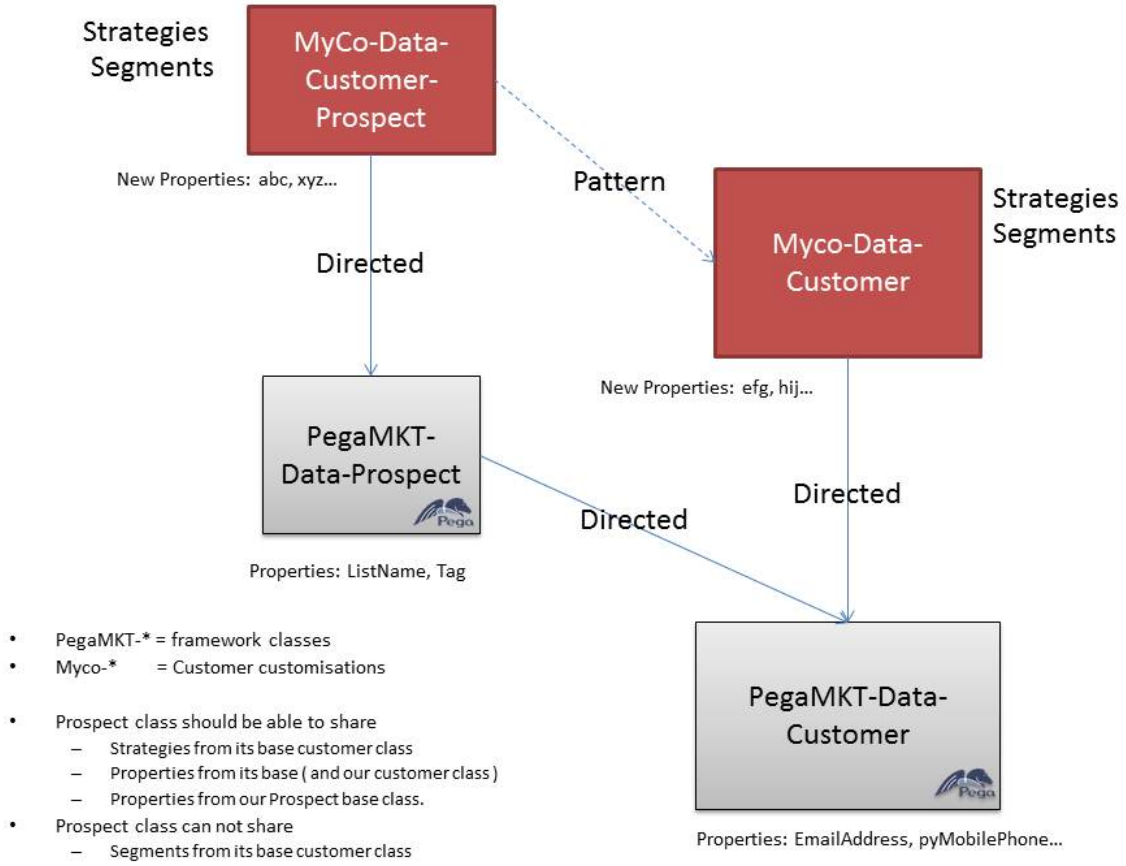
Report	Description
Marketing Calendar	Presents a bird's eye view on the current set of marketing activities by status and by time (day, week, month).
Report Browser	Facilitates the management of reports in the system. Examples include reports pertaining to interaction history, adaptive model performance, checklist summary, campaign summary, promoter survey, and un-subscriptions.

Data and logic model

Pega Marketing provides common data objects to manage customer data. The following matrix provides the key objects used in the Pega Marketing application:

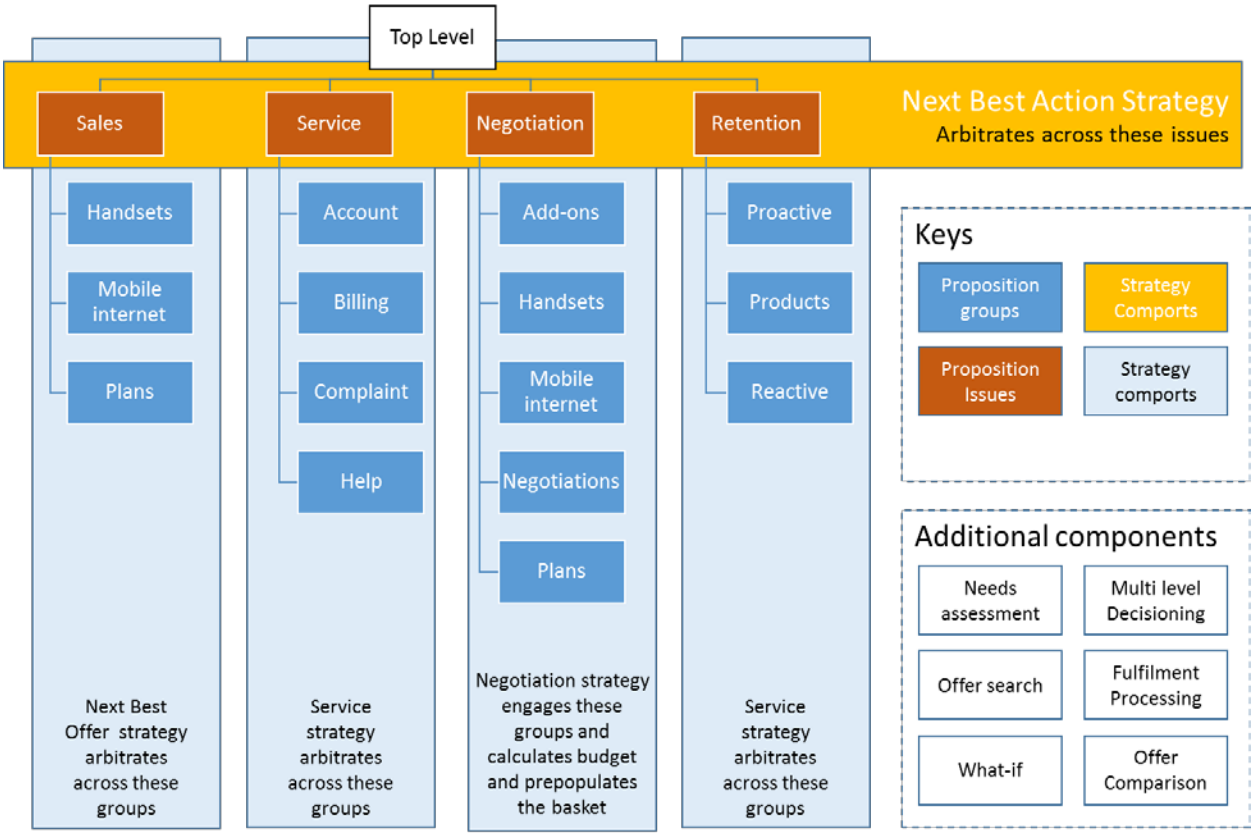
Data object	Description
Customer	Representation of the customer entity. A custom customer class may be used instead of the Pega Marketing provided customer class. The custom customer class can be specified via the Application Settings landing page.
Prospect	Representation of a potential customer. A custom prospect class may be used instead of the Pega Marketing provided prospect class.

Extended customer and prospect class structure



Next-Best-Action Advisor blueprint and strategy model

The following diagram illustrates the primary assets provided by the Next-Best-Action Advisor blueprint:



Roles, portals, and dashboards

Pega Marketing roles

Pega Marketing supports roles needed for corporate and field marketing operations. These roles include Analyst, Manager, Administrator, Field Marketer, and Field Marketing Manager.

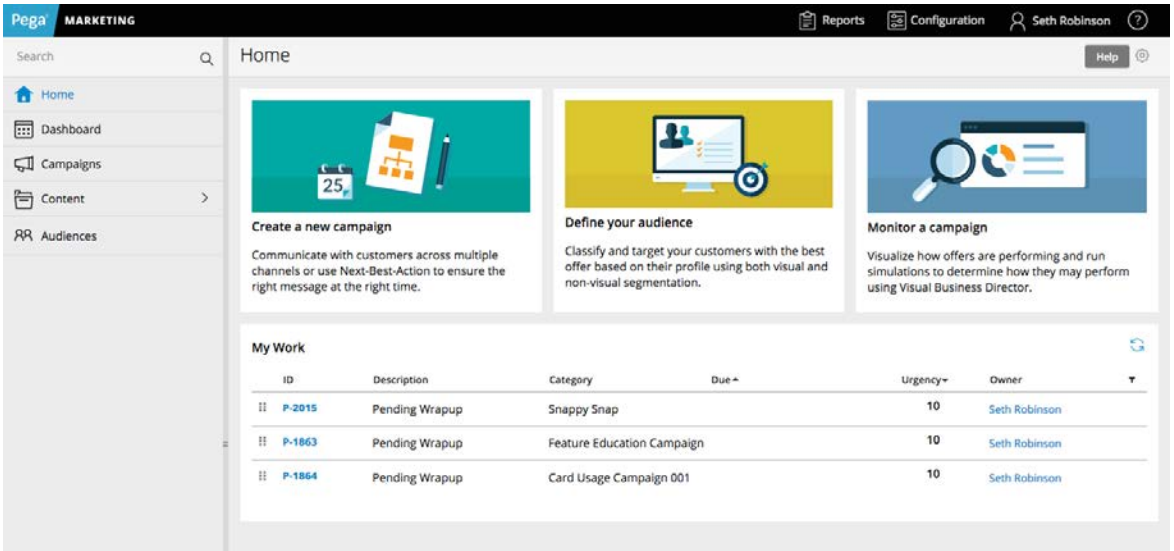
This matrix describes each of the roles provided with Pega Marketing, their default portal, and key dashboard capabilities:

Role	Description	Default portal
Analyst	Marketing analysts create and manage marketing artifacts. They also configure, run, and monitor campaigns.	Pega Marketing
Manager	Marketing managers manage teams of analysts. They can also review and approve campaigns.	Case Manager
Administrator	Marketing administrators have access to system configuration features.	Designer Studio
Field Marketer	Field marketers create campaigns using campaign templates. They identify contacts to target with each campaign and can monitor the success of their campaigns.	Field Marketing
Field Marketing Manager	Field marketing managers can review and approve field campaigns. They also monitor the success of all field marketing campaigns as a whole.	Field Marketing
NBAA Developer	NBAA developer can implement and extend the Advisor desktop application to meet specific customer requirements. They can also integrate the Advisor panels into the customer service desktop.	Designer Studio
NBAA Agent	NBAA agent is typically a customer service, sales, or retention agent that interacts with customers over all assisted channels.	NBAA
NBAA Application Manager	NBAA Application Managers can configure and manage the application from a business perspective. This includes defining the customer intents and	Designer studio

Role	Description	Default portal
	categories, and actions available for agents.	

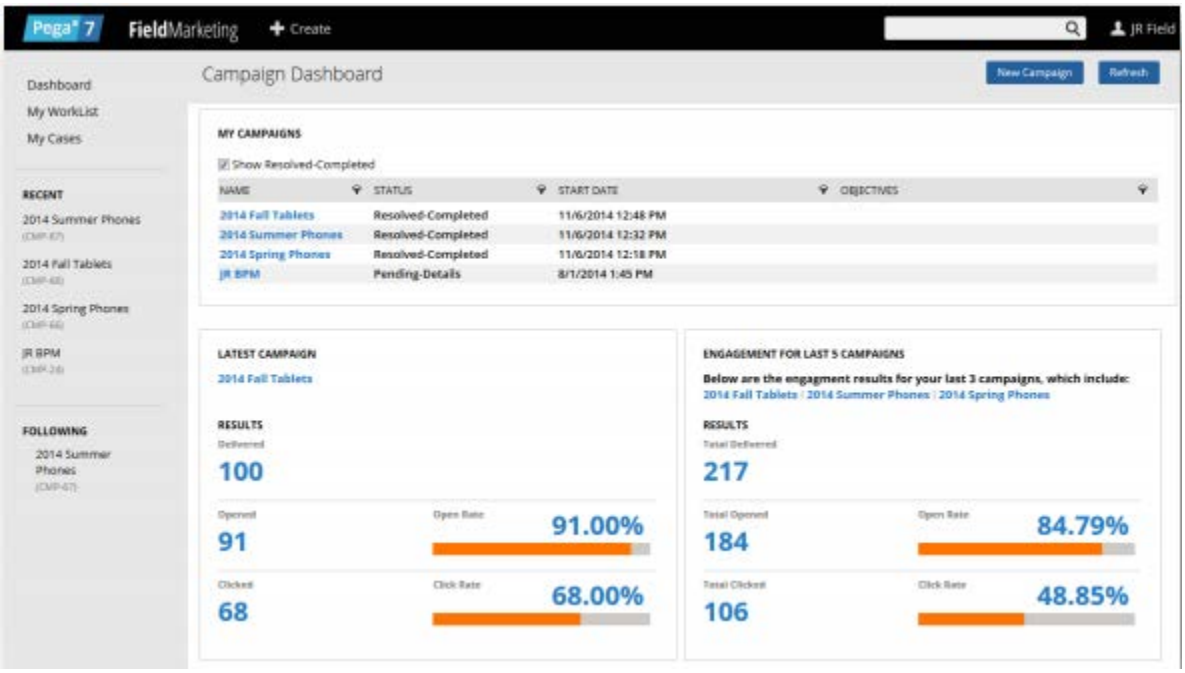
Pega Marketing portal

The Pega Marketing portal is specially built for the marketing user and provides the user with quick and convenient access to a wide variety of resources. This portal incorporates a role-based information layout where analyst, manager, and administrator users see appropriate menu items.



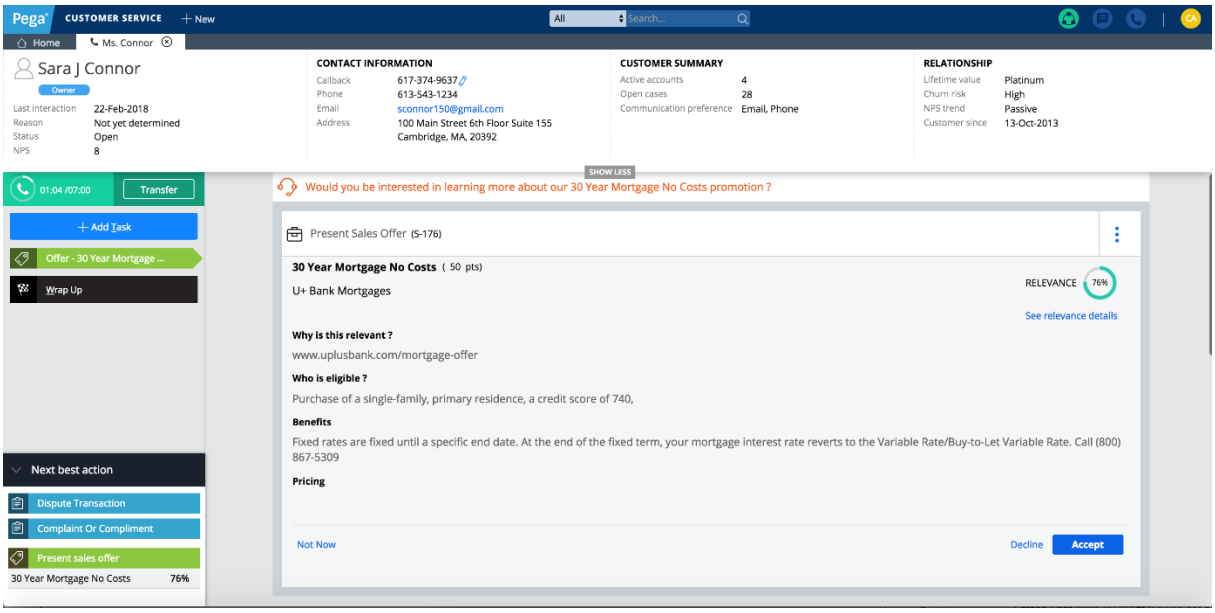
Field Marketing portal

The Field Marketing portal is the default portal for both field marketers and field marketing managers. It provides the user with resources to create, monitor, and manage their campaigns.



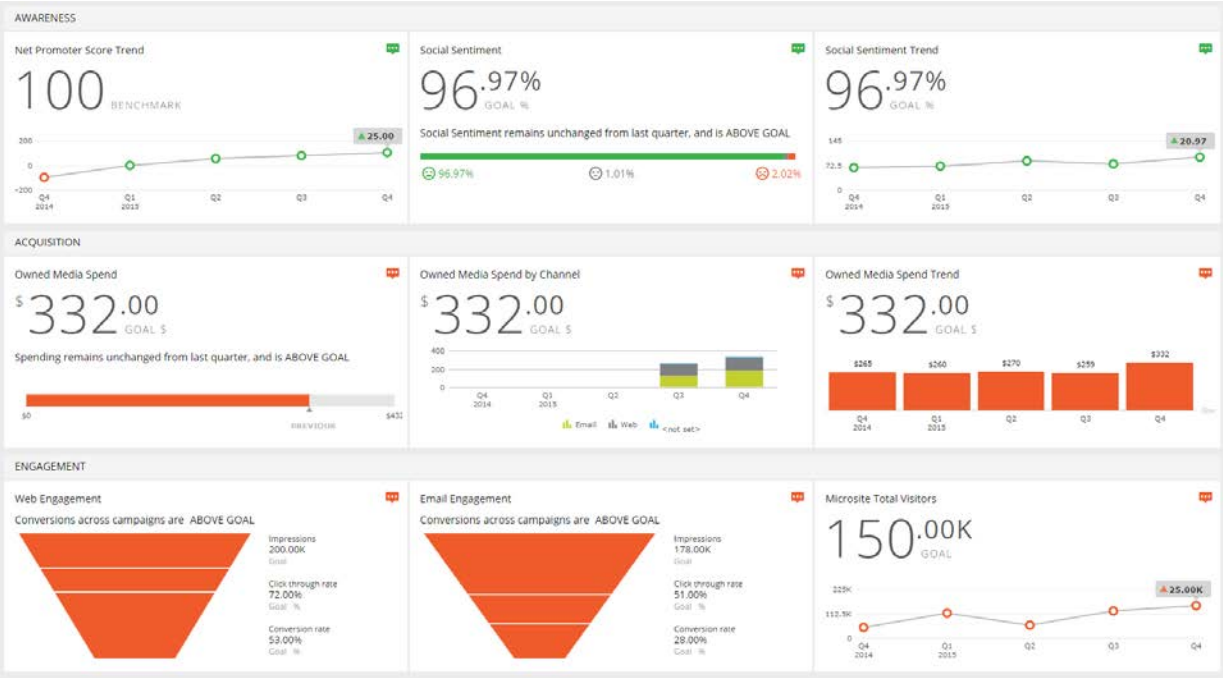
NBAA portal

The NBAA portal is the default portal for NBAA agents. It enables the user to assist customers with their service requests and create personalized offer bundles to satisfy overall business objectives.



Marketing dashboard

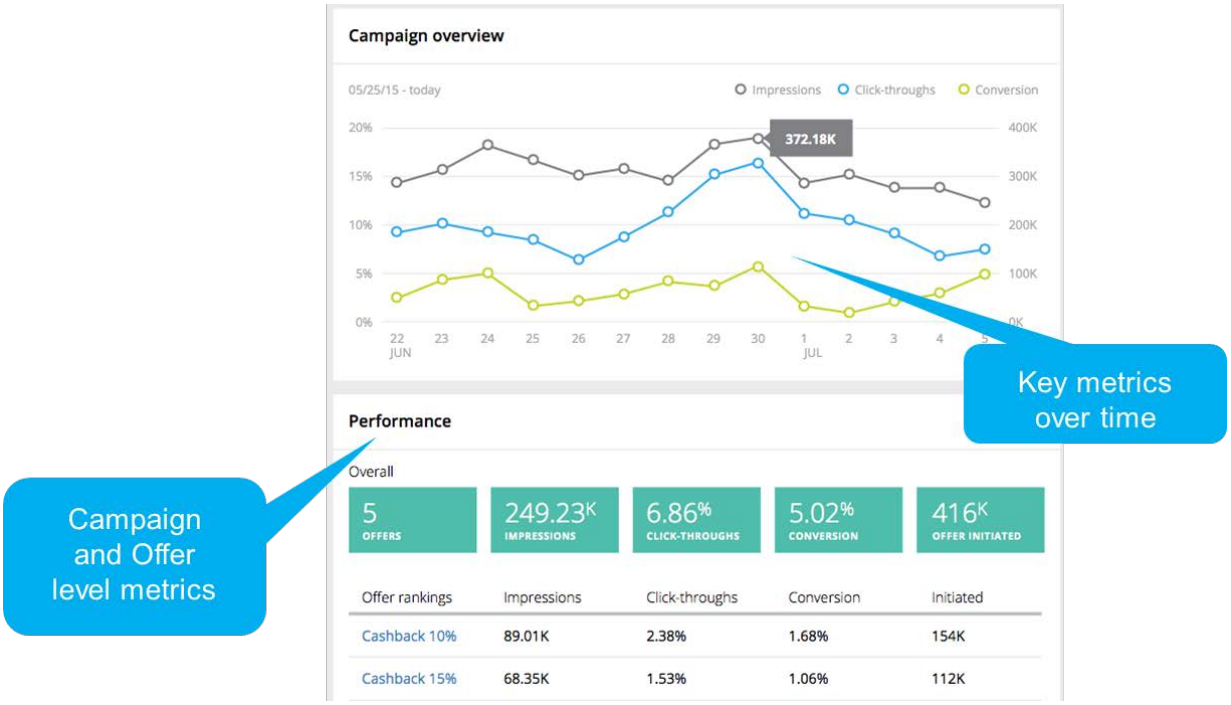
The Marketing dashboard provides marketers with a customizable set of widgets. These widgets display the application's performance across various marketing metrics. Marketers can customize the widgets displayed in the dashboard and configure the goals for each widget. Once configured, the dashboard enables marketers to quickly assess how their business is doing. The marketer can also apply different filters to further refine the displayed metric data.



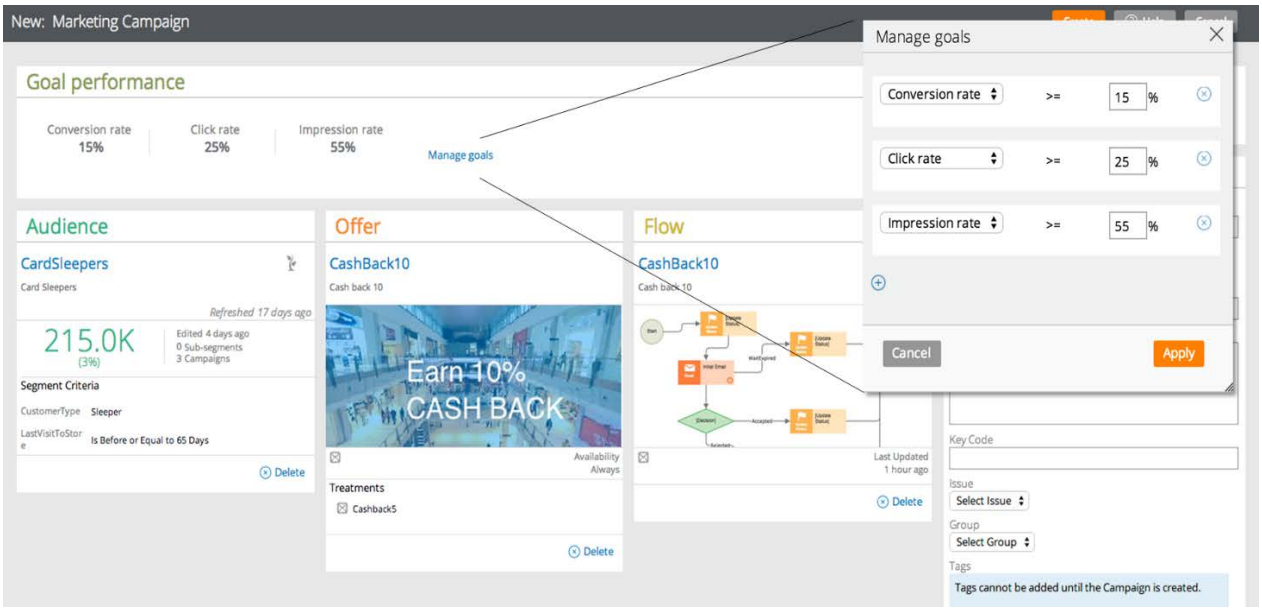
Campaign monitoring

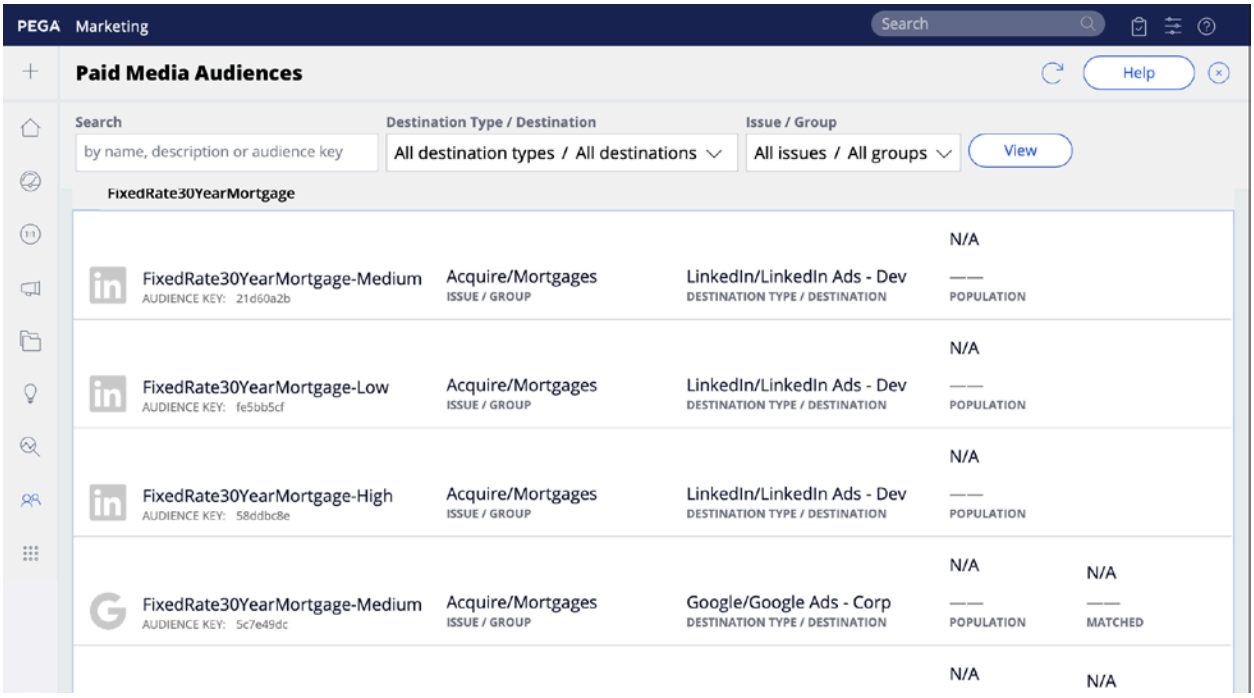
The campaigns landing page lists the multi-channel campaign and outbound campaigns system. Marketers can use this landing page to find and open existing campaigns, create a new campaign, and review high-level campaign details.

The marketer can drill into each of the campaigns and review their specific performance. The image below illustrates the key metrics (impressions, conversions, click-through rate) over time, at the campaign level and per offer contribution.



These KPIs and the trends area help to drive awareness and reporting on how effective the marketing activity has been. This all starts when the marketers specify the individual campaigns, their goals, and budgets.



Paid media audiences

Paid Media audiences landing page list all paid audiences in the system along with population size. For Google Ads the match rate is also shown per audience. Audiences can be filtered by destination, destination type, issue, and/or offer group.