

Pega Next-Best-Action Advisor Product Overview

Pega Next-Best-Action Advisor provides a configurable, ready-to-use user interface that delivers Next Best Action in the optimal manner for inbound channels, under complete control of Pega Customer Decision Hub, configurable through Next Best Action Designer.

Pega Next-Best-Action Advisor uses Pega Customer Decision Hub to determine the value of the customer now and in the future, then determines how much the business wants to treat the customer based on this value calculation. This drives the Next Best Action, the Next Best Offer (Cross Sell/Up Sell), or leads the customer into compiling a complex recommendation to retain and build customer loyalty, where the amount to invest in creation of this recommendation is based on the customer value.

Negotiator provides the following benefits:

- Simplifies and aligns the Acquisition and Retention journeys.
- Creates personalized recommendations that utilize AI-driven historical and real-time data
- Empowers your business with a configurable and adaptable way to present and negotiate recommendations.

Pega supports the following versions of Negotiator:

- Free-standing Bundle Negotiator (deprecated in Pega 7.4).
- Bundle Negotiator 1.0 (implemented in Pega Customer Service 7.4 in the *LocalOfferNegotiator* class; deprecated in Pega 8.3).
- Negotiator 2.0 (implemented in Pega Customer Service 8.2 in the Acquisition journey; moved to the Negotiator class in Pega 8.3)**Note:** Pega Next-Best-Action Advisor includes Negotiator versions 1.0 and 2.0. Negotiator versions earlier than 2.0 are used for backward compatibility.

Note: Implementing Pega Next-Best-Action Advisor in version 8.3 and later requires implementing Negotiator 2.0. For more information, see the *Pega Next-Best-Action Advisor Installation Guide* on the [Pega Next-Best-Action Advisor product page](#).

Negotiator 2.0 resides in the *PegaComm-FW-CPMCFW-Work-Negotiation* class, which is a child class of both the *PegaComm-FW-CPMCFW-Work-Negotiation-Retention* and the *PegaComm-FW-CPMCFW-Work-Negotiation-Acquisition* class.

- [Next best action capability](#)
- [Recommendation capability](#)
- [Needs assessment capability](#)
- [Negotiation capability](#)

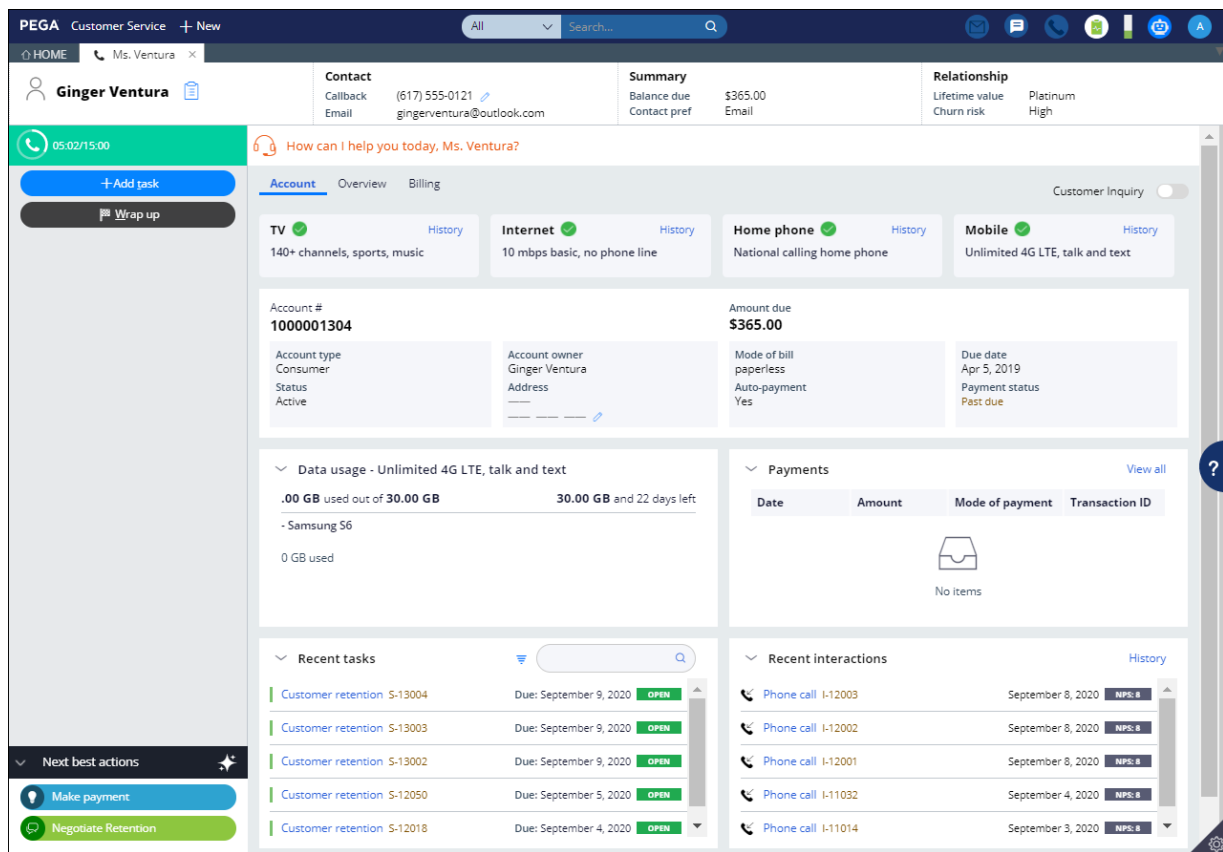
Next best action capability

For easier management of next best actions, once the customer is identified, Pega Next-Best-Action Advisor is shown to the agent.

Pega Next-Best-Action Advisor begins by making a call to the next-best-action real-time container exposed by Pega Customer Decision Hub. Based on what is known about the customer, the strategy determines the next best action. The strategy behind this decision is configured using Next-Best-Action Designer.

If the next best action is to upgrade or retain, or to acquire a new customer, the Negotiator is displayed, as shown in the following figure:

The next-best-action Negotiator



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Recommendation capability

Fulfill the first stage of the negotiation process by presenting the recommendation to the agent.

Each subscription on the account is represented as a row in the **Recommendations** section and is determined by the real-time container that is exposed by Pega Customer Decision Hub.

This recommendation is selected based on the propensity calculated by the adaptive models. The relevant rules are implemented through Next-Best-Action Designer.

Pricing

Pricing is the static amount of discounting available, which is constrained by an investment budget (as determined by the strategy). For example, when a manufacturer sets the price of their mobile device to \$750, that price is fixed. As a telecommunications provider, you may choose to offer a \$50 discount to the customer, but that impacts the cost of investment made to the them.

Each subscription is designated to a specific category of service, for example, Mobile or TV. The following types of subscription are available:

Shared

The subscription is not allocated to a specific individual and is instead associated with the household, for example, TV or broadband.

Individual

The subscription is allocated to a specific individual, for example, a mobile phone.

The next-best-action Recommendations section

Customer retention (S-13005)					
Recommendations Filter by monthly cost					
Shared	UPGRADED	TV preferred quad play	\$125.00	\$301.49/mo	Recommend
Internet		Internet starter	--	\$29.00/mo	
Plan		Internet starter	10 mbps basic, no phone line	--	\$29.00/mo
Mobile		Mobile giraffe with Samsung S10	\$125.00	\$140.00/mo	
Phone		Telephone plus	--	\$30.00/mo	
TV		TV preferred with HBO	--	\$102.49/mo	
Current			Total 4	Monthly \$245.99	
Recommendations	Eligible 4	Upgraded 4	Total 4	One-time \$125.00	Monthly \$296.50 \$4.99 savings
				\$0.00 savings	
Compare Decline Save for later Next					

Customer retention (S-13005)					
Recommendations Filter by monthly cost					
Shared	UPGRADED	TV preferred quad play	\$125.00	\$301.49/mo	Recommend
Internet		Internet starter	--	\$29.00/mo	
Plan		Internet starter	10 mbps basic, no phone line	--	\$29.00/mo
Mobile		Mobile giraffe with Samsung S10	\$125.00	\$140.00/mo	
Phone		Telephone plus	--	\$30.00/mo	
TV		TV preferred with HBO	--	\$102.49/mo	
Current			Total 4	Monthly \$245.99	
Recommendations	Eligible 4	Upgraded 4	Total 4	One-time \$125.00	Monthly \$296.50 \$4.99 savings
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For more information, see "Showing recommendations in Pega Next-Best-Action Advisor" in the *Understanding Pega Next-Best-Action Advisor capabilities* tutorial on the [Pega Next-Best-Action Advisor product page](#).

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Needs assessment capability

If the recommendation does not meet all the customer requirements, the agent can go through a needs assessment with the customer for a specific subscription. As part of the needs assessment, an additional context is determined. The additional context becomes another piece of metadata that is used to determine a better recommendation.

The **Needs assessment** dialog box contains a list of additional questions about customer preferences, followed by a selectable representation of all available recommendations. For more information, see [Recommendations](#).

The next-best-action needs assessment dialog box

Shared needs assessment

Service preference

Internet

Mobile

Phone

TV

Device [+View more](#)

What screen size do you prefer?

--Select--

Work

How do work these days?

From Home

From Office

On The Road

Current



Current products and services

Samsung S6 quad play

\$245.99 /month \$90.00 one-time

Samsung S6 with 16/5 MP camera,Unlimited 4G LTE, talk and text,140+ channels, sports, ...

View details

Recommendations



Personalized recommendations

TV preferred quad play

\$296.50 /month \$125.00 one-time

Avail exclusive discount on your order,Samsung S10 with Infinity-O display,Super user 10GB ...

83%

View details

Pin



General recommendations

Bronze quad play

\$244.08 /month \$0.00 one-time

200+ channels, 50/5 Mbps, Phone, ultd voice

90%

View details

Cancel

Submit

Shared needs assessment

Service preference

Internet

Mobile

Phone

TV

Device [+View more](#)

What screen size do you prefer?

--Select--

Work

How do work these days?

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For more information, see "Assessing needs in Pega Next-Best-Action Advisor" in the *Understanding Pega Next-Best-Action Advisor capabilities* tutorial on the [Pega Next-Best-Action Advisor product page](#).

Recommendations

Increase a chance of the recommendation becoming accepted by reviewing the recommendations suggested by Pega Next-Best-Action Advisor.

In the **Needs assessment** dialog box shows, you can review the recommendations for the customer. The list shows the type and name of the recommendation, the monthly and one-time cost, and the names of actions in the recommendation. Click **View details** to see the full list of actions in a recommendation, and their descriptions.

The following bundle types are available:

Personalized recommendation

Pega Customer Decision Hub checks the actions available to a customer, determines what mix of actions would make the best recommendation for the customer, and discounts the price accordingly.

General recommendation

A fixed bundle of different actions at specific prices. This type of recommendation is created by a product manager. Pega Next-Best-Action Advisor uses modeling to determine which static recommendation the customer is most likely to want.

You can also refer to the general recommendation as an advertized recommendation.

You can modify the needs assessment, for example, its service categories or questions, until the recommendation is locked in place. To lock a recommendation, click **Pin**. After a recommendation is pinned, its contents will not be affected by any changes to the preferences.

For more information about pinning and other features of Pega Next-Best-Action Advisor, see "Features of the Pega Next-Best-Action Advisor" in the "Understanding Pega Next-Best-Action Advisor capabilities" tutorial on the [Pega Next-Best-Action Advisor product page](#).

Negotiator actions

Continue the negotiation process by completing further Negotiator actions.

At the bottom of the **Negotiation** screen, you have following options:

Save for later

Saves the case and resume working on it later.

Next

Opens the Negotiator.

Compare

Compares the granular actions in each of the recommendations with the customer's current recommendation, as determined by the product holdings in the database.

Click **Compare** to see the current customer offer from their product holdings in the first column. The next column is the personalized recommendation, where a strategy has determined the benefits and discount.

The top of the screen shows the type and name of the recommendation, as well as a budget indicator, that is, the business value of the recommendation. For example, green is a good recommendation, amber is a concern, and red is a poor recommendation. Click **Close** to return to the Negotiator.

The Compare offers window

The screenshot shows a 'Compare offers' window with three columns of recommendations. Each column includes a bundle name, a price, a list of actions with their costs, and a 'Selected' status. The 'Current bundle' is the baseline, while 'Modification 1 Preferred' and 'Modification 3 Alternative' show potential improvements or alternatives.

Current bundle	Modification 1 Preferred	Modification 3 Alternative
Current bundle \$245.99 /month 	Preferred \$296.50 /month \$125.00 one-time \$4.99 /month discount \$0.00 one-time discount Selected	Alternative \$244.08 /month \$0.00 one-time \$4.90 /month discount \$0.00 one-time discount
Internet starter 10 mbps basic, no phone line	Internet starter 10 mbps basic, no phone line	Internet preferred 50/5 Mbps, great for shopping
Mobile ultd premium Unlimited 4G LTE, talk and text	Mobile giraffe Super user 10GB plan	Mobile ultd start Unlimited talk and text
Samsung S6 Samsung S6 with 16/5 MP camera	Samsung S10 Samsung S10 with Infinity-O display	
TV preferred 140+ channels, sports, music	TV preferred 140+ channels, sports, music	Tv plus 200+ channels, HD, and digital content

Cancel

For more information on comparing actions, see [Comparing actions with Bundle Negotiator in the Pega](#)

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Negotiation capability

Fulfill the negotiation process by reviewing the relevancy, commission, investment, one-time cost and monthly cost.

The **Negotiation** screen follows the same layout as the **Recommendation** screen, representing each subscription on the account a separate row.

Relevancy

Relevancy is the average relevancy of the actions in the recommendation.

Commission

The commission is the amount of points a customer service representative earns if the Customers accepts this recommendation. The commission is higher for recommendations that are better for the business. The value of the budget is determined by the investment budget, which in turn is determined by the Budget supporting decision.

Cost

The customer service representative should keep the investment cost of the recommendation below this investment, as this means a good deal for the business. If the customer switches to a cheaper plan, the business gets less value from this customer.

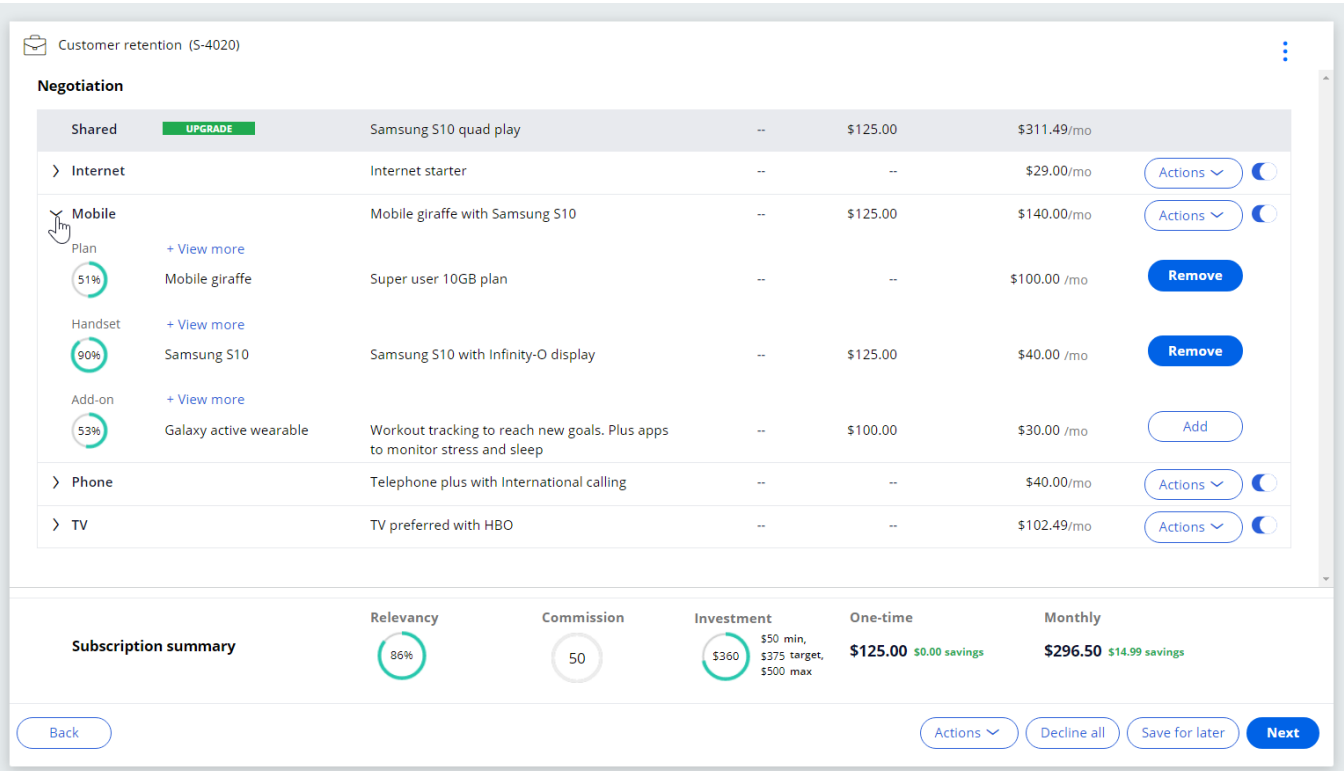
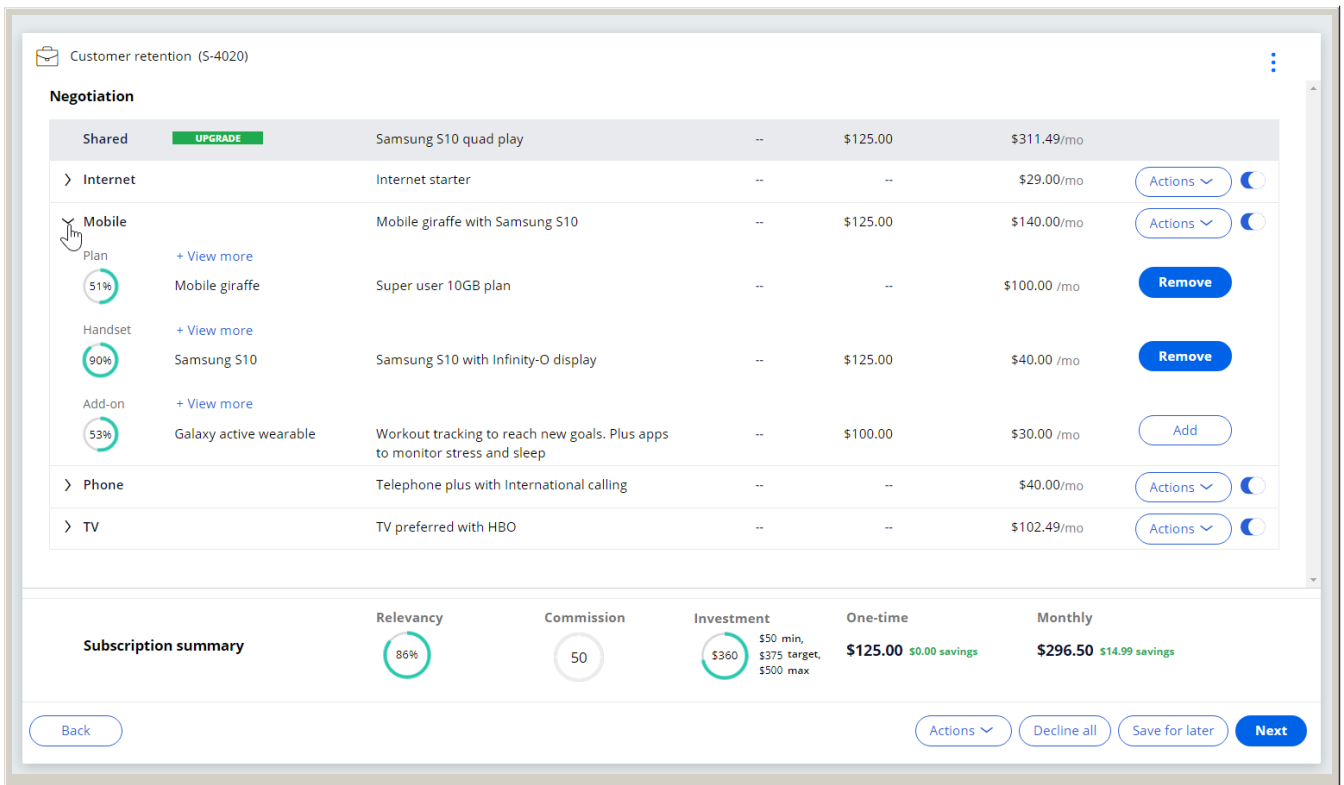
By opening a subscription and choosing **View more**, the Negotiator allows you to find alternatives to the initial recommendation. For example, you can add an accessory that was not part of the original recommendation, or switch the recommended plan to a cheaper, or a more expensive one.

Negotiator screen overview

If after needs assessment the recommendation still does not meet the customer's expectations, or maybe they just require a little extra discounting, the Negotiator screen allows the agent to further refine the Recommendation by choosing from a list of alternative offers, ranked by Pega Customer Decision Hub.

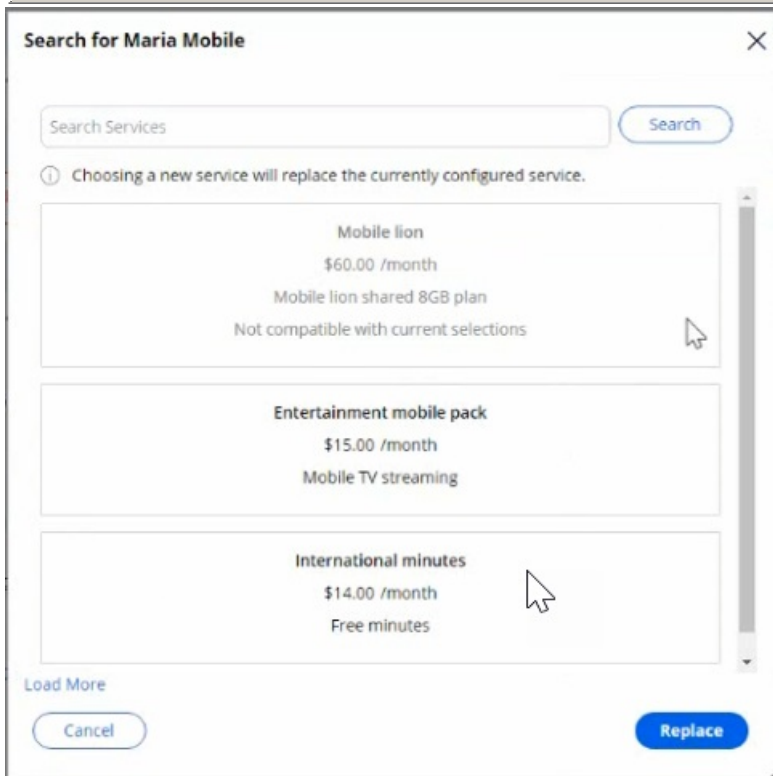
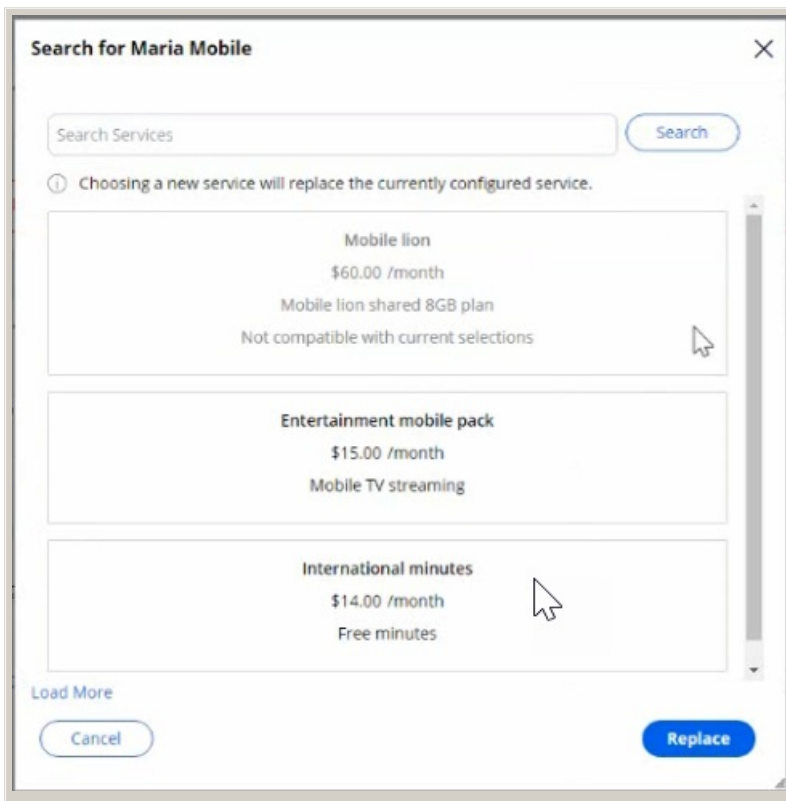
Negotiator is constrained by a budget, which ensures that the offering and price are consistent with the business policy in terms of the customer value. The budget also determines how much the business wishes to invest to acquire or retain the customer. When the budget is exceeded, the investment indicator shows a warning in red.

The agent can access alternative discounts to further personalize the price point of the recommendation. The agent sees how well the offered discount fulfills their targets thanks to the investment gadget on the on the negotiation screen. Adding a discount that is a good deal for the business will make the investment indicator green, discounts that are a moderate - amber, and large discounts - red. In this way, the agent is encouraged to maximize the ROI by retaining the client without giving away too much of the investment budget.



Tip: KPI data is stored in the `cdh_data_negotiation_outcome` database table. You can build your own business intelligence reports by using an ETL tool to move the data to your Business Intelligence Reporting tool of choice.

Should the list of offers available not be sufficient, a Search capability is available to find alternative offers. It is possible to integrate this with a Product Catalog in situations where the agent requires access to the full list of products.



Additional actions of the Negotiator

Each subscription has a list of associated actions, which allow you to perform further actions on a specific subscription.

These additional actions include:

Replace recommendation

Allows you to copy the recommendation for one subscription to another subscription.

Search offer

Allows you to search through all the offers available for this subscription, regardless of their compatibility. **Note:** For a full list of products and services, this feature must be integrated with your Product Catalog during implementation.

Discounts

Negotiate recommendations to fit a customer's budget by using the discounts option.

If the discount for the recommendation is not sufficient, the **Add discount** Negotiator option shows all the available discounting options available for the customer.

Selecting a higher value discounts will likely increase the cost of the upgrade to your business, which is reflected in the investment shown in the cost area of the **Negotiaton** section.

For more information, see "Refining recommendations in Pega Next-Best-Action Advisor" in the *Understanding Pega Next-Best-Action Advisor capabilities* tutorial on the [Pega Next-Best-Action Advisor product page](#).

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