PegaWorld iNspire

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Microjourneys: Pega's Best Practice to Transition from Customer Journey to Agile Delivery

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Today You'll Learn ...

1. How to define "Microjourney"®

2. How Microjourneys can help you

3. How to identify Microjourneys

4. How to implement customer journeys with Microjourneys
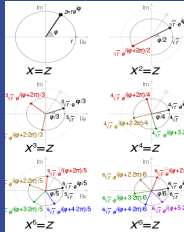
1. How to define "Microjourney"

What is a Customer Journey?
Pega Uses Forrester's Definition

A journey is the series of interactions between a customer and an organization that occur as the customer pursues a specific goal.

The Three Challenges of Customer Journeys

They can be complex

They can be complicated
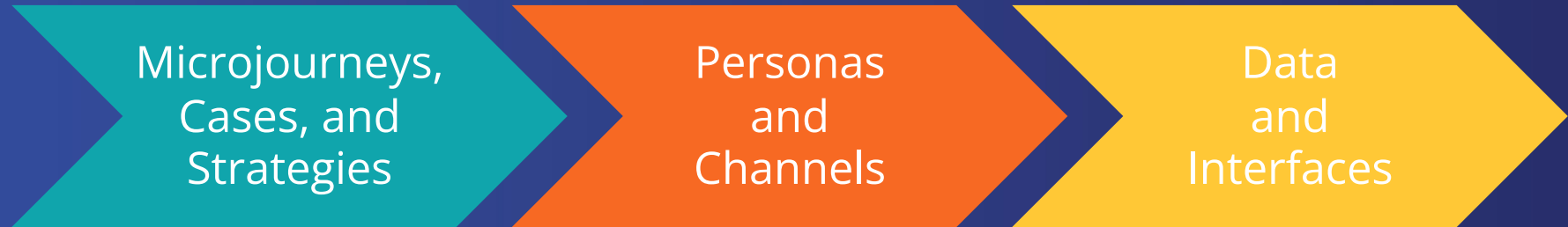

They can take a long time to implement

Pega Solves These Challenges with Microjourneys

A Microjourney is a part of
a customer journey:

A business transaction that
results in an intermediate or
final outcome

Microjourneys are Part of the 3 Pillars of an Application

Microjourneys, Cases, and Strategies

Personas and Channels

Data and Interfaces

Case Type, Personas, and Data in App Studio

A Microjourney Typically Delivers

A single outcome

In 60 – 90 calendar days
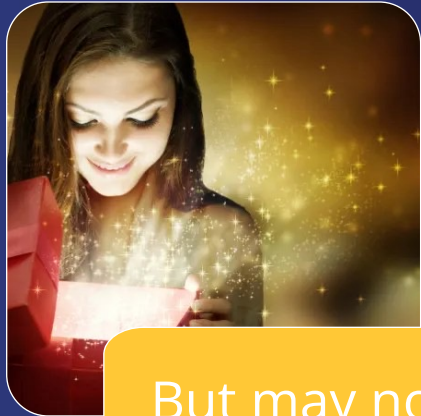
But may not be released immediately

A Microjourney Can Be Delivered ...
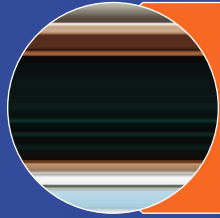
To multiple personas

Over multiple channels

With multiple data sources

2. How Microjourneys can help you

Leveraging Microjourneys Can …

Speed Your Implementation

Clarify Your Scope

Reduce Your Risk

Increase Your Business Value

3. How to identify Microjourneys

Identifying Microjourneys – An Example

Aimee, a potential customer of the Triple C Automotive Club, wants a membership with the club to get roadside assistance when she needs it

Triple C Automotive Club's Customer Journey

Apply For Membership

- Investigate options
- Complete application
- Submit payment

Obtain Roadside Assistance

- Request assistance
- Validate request
- Provide service

Renew Membership

- Review history
- Investigate options
- Submit renewal

Identifying Microjourneys by outcome

| Apply for membership | Obtain roadside assistance | Renew membership |

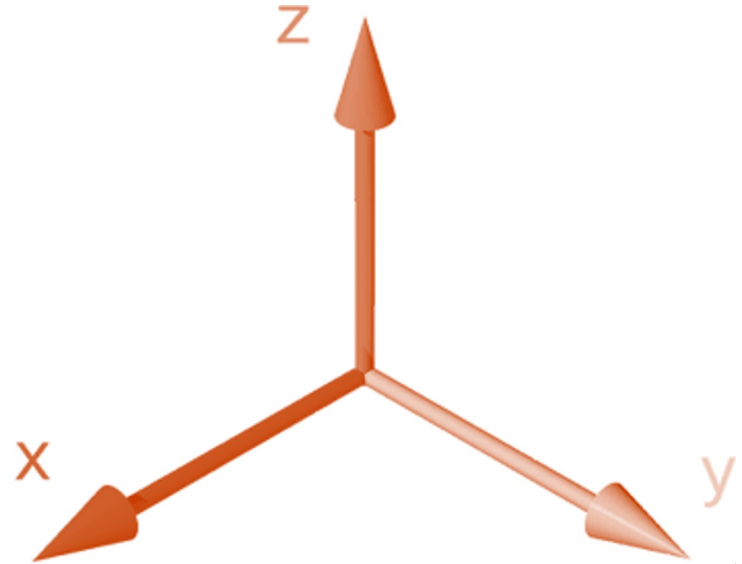| Request assistance | Validate request | Provide service | Resolve request |

Identifying Microjourneys by Dimensions

Customer Journeys Can Involve

- Multiple outcomes
- Multiple personas
- Multiple channels
- Multiple data sources

Break Journeys Down

- Along one or more of those dimensions
- To support releases every 60 – 90 days

Begin with the Journey's Dimensions …

Aimee, a potential customer of the Triple C Automotive Club, wants a membership with the club to get roadside assistance when she needs it

Outcomes	Apply for membership Obtain roadside assistance Renew membership
Personas	Premium customer Standard customer Customer service agent Repair technician
Channels	Call center desktop Mobile app Tablet app
Data Sources	Triple C customer database Service provider database Repair estimation service

... and Start Identifying Microjourneys

Microjourney 1:

Allow a customer to receive roadside assistance

Outcomes	Apply for membership Obtain roadside assistance Renew membership
Personas	Premium customer Standard customer Customer service agent Repair technician
Channels	Call center desktop Mobile app Tablet app
Data Sources	Triple C customer database Service provider database Repair estimation service

... and Start Identifying Microjourneys

Microjourney 2:

Allow a potential customer to apply for membership with a mobile app

Outcomes	Apply for membership Obtain roadside assistance Renew membership
Personas	Premium customer Standard customer Customer service agent Repair technician
Channels	Call center desktop Mobile app Tablet app
Data Sources	Triple C customer database Service provider database Repair estimation service

... and Start Identifying Microjourneys
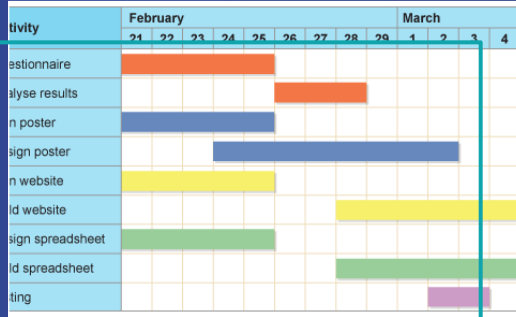
Microjourney 3:

Allow a premium customer to compare the cost of repair options with a mobile app

Outcomes	Apply for membership Obtain roadside assistance Renew membership
Personas	Premium customer Standard customer Customer service agent Repair technician
Channels	Call center desktop Mobile app Tablet app
Data Sources	Triple C customer database Service provider database Repair estimation service

4. How to implement customer journeys with Microjourneys

Use Microjourneys to …
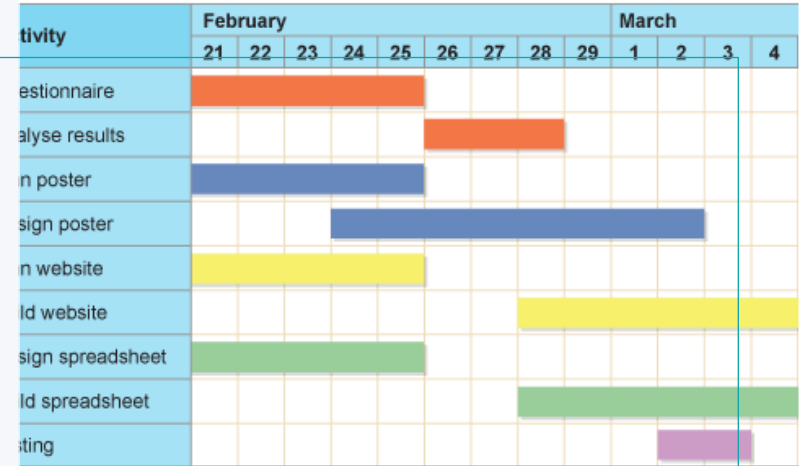

Plan

Organize

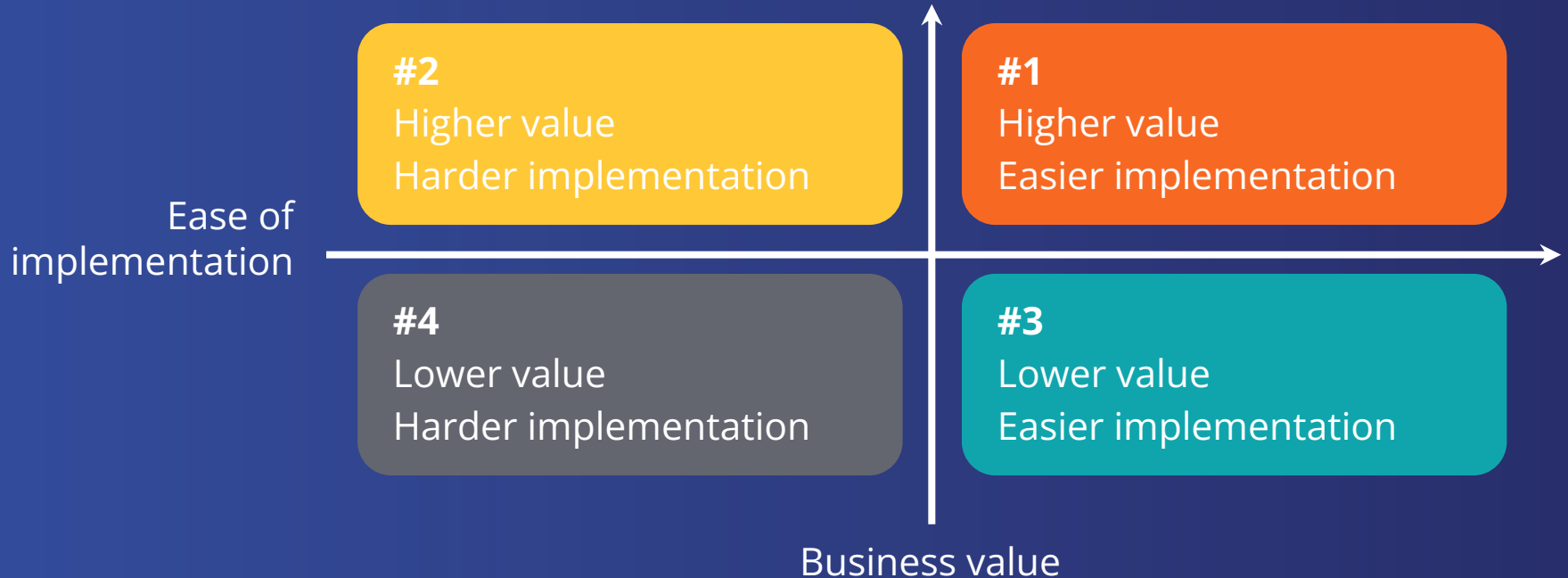Communicate

Plan with Microjourneys

1. Identify your Microjourneys

2. Determine their business value

3. Determine a coarse implementation estimate

4. Use steps 2 and 3 to produce a prioritized list

5. Use that prioritized list to
   1. Create a Microjourney roadmap
   2. Begin a Microjourney-based story map
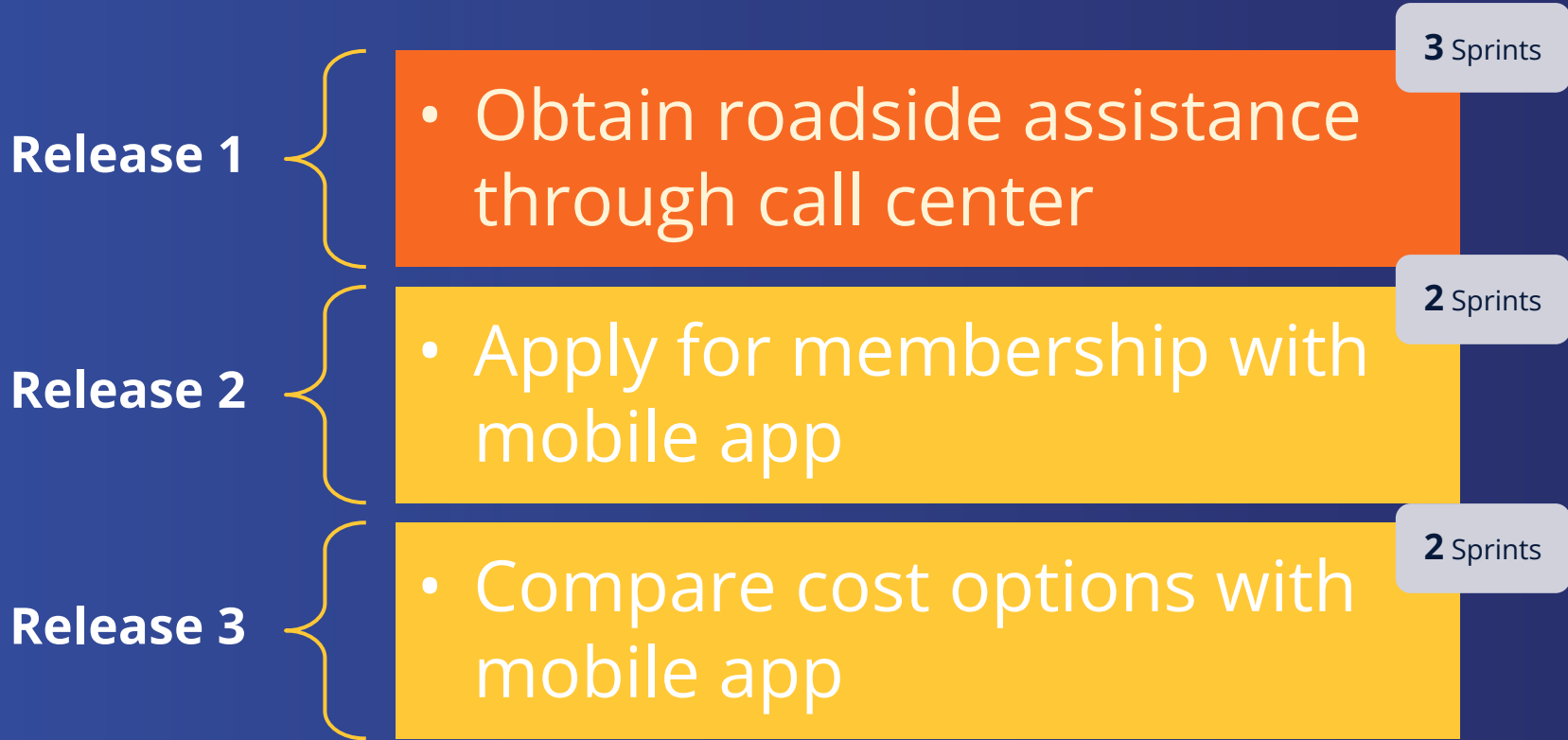

Plan

Prioritize Microjourneys

#2
Higher value
Harder implementation

#1
Higher value
Easier implementation

Ease of
implementation

#4
Lower value
Harder implementation

#3
Lower value
Easier implementation

Business value

A Microjourney Roadmap

Release 1

- Obtain roadside assistance through call center

3 Sprints

Release 2

- Apply for membership with mobile app

2 Sprints

Release 3

- Compare cost options with mobile app

2 Sprints

A Release Can Deliver Multiple Microjourneys ...

Release 1

- Obtain roadside assistance through call center

Release 2

- Apply for membership with mobile app
- Compare cost options with mobile app

... but Deliver a Microjourney in a Single Release

Release 1

- Obtain roadside assistance through call center

Release 2

- Apply for membership with mobile app

Releases 3 & 4

- Compare cost options with mobile app

A Microjourney-based Story Map

	Customer obtains roadside assistance through mobile app	Customer applies for membership with mobile app	Premium customer compares repair cost options with mobile app
Sprint 1	▢ ▢ ▢ ▢		
Sprint 2	▢ ▢ ▢	▢	▢
Sprint 3		▢ ▢ ▢ ▢	
Sprint 4		▢ ▢	▢ ▢ ▢ ▢
Sprint 5			▢ ▢ ▢

Organize with Microjourneys

- Elaboration plan
  - Based on your Microjourney roadmap

- Implementation plan
  - Ordered by Microjourney priority

- Out-of-sprint testing
  - Structured by Microjourney dimensions

- Change management
  - Focused on outcome, persona, & channel

Organize

Communicate with Microjourneys

- Describe delivery activities in terms of outcomes, personas, and business value

- Describe a release by
  – The value it provides
  – To whom it provides that value

- Express those characteristics in terms that everyone (business and technical) understands

Communicate

Describe Delivery Activities with Microjourneys

From this

We are implementing a service-based interface to the repair system of record

To this

We are providing customers with the ability to view the repair history for all of their vehicles

Describe Releases with Microjourneys

From this

- Integrate with departmental customer data
- Implement company-wide customer search
- Expand duplicate-customer test

To this

- CSRs can improve service through visibility into a customer's relationship with the company across business units
- Marketing can make better decisions through the reduction of duplicate-customer creation

In Summary

Customer journeys can be

- Complex
- Complicated
- Difficult to deliver quickly

In Summary

Micro-journeys allow you to

- Break your journeys into value-delivering pieces
- Speed your delivery and clarify your scope
- Reduce your risk and increase business value
- Plan, organize, and communicate more effectively

Resources

Core Pega Express Best Practices for the Business Architect

https://academy.pega.com/topic/core-pega-express-best-practices-business-architect/v1/in/47641/50971

Pega Express Best Practice: Microjourneys

https://docs-previous.pega.com/pega-express/pega-express-best-practice-microjourneys

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Thank You For Attending

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