



# PEGA CONSULTING MINI INCEPTION SERVICE

*FAST TRACK THE DELIVERY OF AN INITIAL PEGA IMPLEMENTATION FOR PRODUCTION*

## AT A GLANCE

### KEY CHALLENGE

When evaluating strategic technology to address business challenges and opportunities, executives often need to understand both the License and potential Consulting Services costs of deploying Pega solutions before proceeding. However, a detailed scoping exercise to accurately size the work effort is part of the first phase of the project delivery, after the license sale.

### THE SOLUTION

Pega's Mini Inception Service is a high value consulting assignment that captures the business requirements for the initiative and provides a rapid and accurate assessment of costs with a high level delivery plan.

## KEY BENEFITS

- Drives greater certainty on exact solution requirements.
- Produces a robust set of deliverables that support project definition of scope and targeted implementation.
- Supports vendor selection process.
- Demonstrates business value to all stakeholders.
- Leverages mature, proven methodology to turn an idea into a solid plan and services proposal.

## PACKAGED APPROACH TO SUPPORT CASE CREATION AND SECURE BUDGET FOR PEGA PROJECTS

Pega Consulting Mini Inception Service uses Pega's Direct Capture of Objectives (DCO) process to rapidly capture, organize and store customers' envisioned process(es), and turn the ideas or set of requirements into a solid plan and services proposal. Using a series of consulting tools, the Mini Inception engagement team captures business logic, objectives, and requirements to assess the business benefits, specify the work to be accomplished, and calculate the level of effort in terms of timeframes and staffing. A Mini Inception produces a valuable set of deliverables including: a detailed solution proposal with recommended process improvements and reengineering, a project 'sizing' which includes use cases, interfaces, and reports, and a high level project plan of the delivery approach.

Based on process walkthroughs of the to-be process(es), Pega Consulting will define an optimized approach for the subsequent delivery of the solution, or a subset of its functionality, in order to achieve your business outcomes and objectives.

A Mini Inception engagement is conducted by a small team of Pega software and business application experts (including an Engagement Leader, Lead System Architect, Sales Consultant, Practice Leader, and Alliance Partner as appropriate). This team researches metrics, standard operating procedures, current process diagrams, organization charts, staff experience, and more to analyze the details of the targeted process(es) and associated interfaces.

You will gain the following benefits as a result of the Mini Inception:

- Rapid assessment of costs while minimizing risk of execution
- Transferrable set of deliverables for detailing the business case and securing funding
- Chance to work with Pega before completing vendor selection
- Expedited project time- to-value by capturing the requirements with the Pega platform in mind resulting in less clarification sessions and opinion-based defects during testing.

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## THE PEGA DIFFERENCE

### Methodology Alignment Workshop

This workshop enables Pega Consultants to collaborate with the customer experts and potentially partners to define a standard methodology by blending best practices from each.

### Direct Capture of Objectives (DCO)

The Pega team leads a workshop and DCO session(s) to capture required information directly into the Pega Platform. This accelerates the delivery process and improves the application and project quality. DCO drives greater certainty on the exact requirements and defines an optimized approach for delivering a solution to achieve objectives and business outcomes by:

- Conducting operational process walk-throughs to identify improvements to “as is” processes with the Pega platform in mind
- Capturing business logic, objectives, requirements, use cases, and factors in the “to be” process definition
- Gathering detailed process maps, sample forms and cases for the workshops, numbers and types of users, reporting requirements, and any outputs required by the system
- Reviewing technical information on existing interfaces likely to be reused and the overall IT architecture

### Project Plan

Following the detailed requirements gathering through the DCO process, Pega generates and refines the application profile. Customer subject matter experts provide input to estimate the business volumes by process, number of users, and number of locations. Based on this profile, the team conducts a sizing clinic to calculate the level of effort for delivery, including resource estimates, for the specified process and high level hardware sizing for production systems. The project plan describes the work to be accomplished and costs and business benefits of the Pega Platform and strategic applications.

Customers will:

- Rapidly realize business value and experience working with Pega Consulting and partners before completing the vendor selection
- Understand the business benefits through clearly articulated business outcomes
- Reduce project risk

### About Pegasystems

Pegasystems revolutionizes how leading organizations optimize customer experience and automate operations. Our strategic applications seamlessly connect customers’ marketing, sales, and customer service to their back office operations, and they are uniquely built to rapidly adapt and scale to meet changing consumer demands. We’ve reinvented CRM to meet customers’ needs for a personalized, real-time experience via any channel. For more information, please visit us at [www.pegacom.com](http://www.pegacom.com).