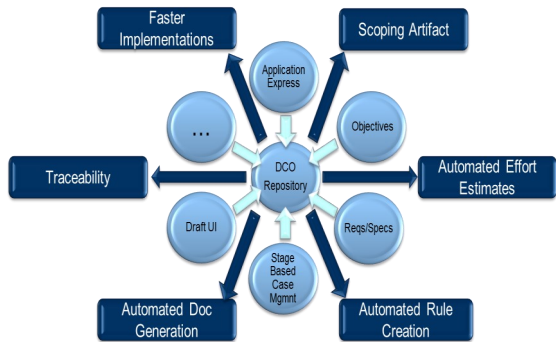


### 1. Leverage DCO to improve project quality

Directly Capture Objectives (DCO) enables a project team to directly enter business requirements for an application into PRPC. This eliminates translation errors so common in building applications with traditional methods, saves the team time and effort, facilitates direct engagement of business and IT resources around visible working models, and enables project participants to optimally review work progress.

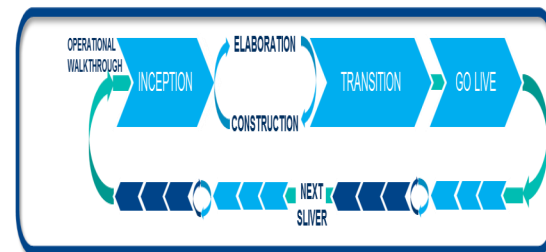
Pega recommends that all projects leverage DCO as a core part of the delivery process, starting with Inception and continuing through the entire project lifecycle.



### 2. Use an iterative delivery mode including project phasing (slivers) and show and tell sessions

Selecting the right delivery model and approach will greatly affect the outcome of a project. Pega recommends that our clients utilize the most agile, iterative delivery model that their organizations can adopt. Regardless of where you fall on the agile-to-waterfall spectrum, we recommend that our clients and partners use the following principles to structure their work:

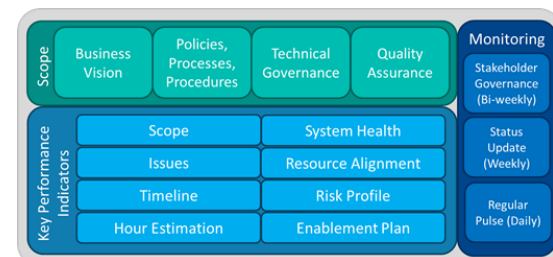
- Break large programs into smaller, more manageable components – each with a defined business benefit and the ability to go live and provide value on a sliver by sliver basis.
- Leverage show-and-tell sessions frequently to gain user feedback. For projects using an agile methodology, this should occur as part of each sprint. For waterfall oriented projects, this should happen multiple times during both the elaboration and construction cycle.
- Begin testing early in the project lifecycle to drive higher levels of product quality and to gain additional user feedback beyond the show-and-tell sessions.



### 3. Utilize a multi-level governance process

Effective governance helps to drive successful project delivery by aligning the activities of all project participants and by focusing the teams on the right issues in a timely manner. Pega recommends the following levels of governance:

- Daily Standup Meeting – A very quick (15 minute) team meeting to set priorities for the day, ensure alignment, and eliminate any blockers.
- Weekly Project Update – Internal to the project team, led by the project manager to track issues and update the status report. Should include representation from all parties involved in the project (Client, Partner, and Pega Consulting). Leverage the Pega Status Report template as a best practice.
- Project Governance – Bi-weekly to monthly review of the project for sponsors. Best practice to include Client, Partner, and Pega account team (Account Executive and Practice Leader) in this meeting regardless of delivery model. Leverage the Pega Governance template as a best practice.



### 4. Ensure your proposed team has appropriate certifications and relevant project experience

Project success depends upon having a complete and capable team. As a rule of thumb, Pega recommends that each team member from a partner or Pega Consulting holds the appropriate certifications for his/her role. Specifically, we recommend that Business Architect and Project Management resources pass the Certified Business Architect exam and the Certified Methodology Blackbelt exam. All developer resources should at a minimum pass the Certified System Architect exam. We suggest a ratio of one certified Senior System Architect for every 3-4 System Architects. Additionally, we recommend that a Certified Lead System architect participate directly in the design of the application. In situations where the partner does not have a CLSA available, we recommend that Pega Consulting conduct a series of Design Reviews during the implementation cycle.

We strongly suggest that our clients ask for the resumes of all staff proposed by a Partner and validate their credentials, particularly their Pega certifications through Pega’s PDN (<https://pdn.pega.com/pega-academy/verify-certification>).

Certifications are a prerequisite but not a guarantee for success. Clients should also look for resources with similar project experiences using Pega technology when evaluating project delivery teams.

A well-resourced project may incorporate a blend of onshore and offshore development resources, particularly at the System Architect level. While moving work offshore will lower the blended rates on a project, it may not directly translate to lower total cost of ownership. Balance the mix of offshore and onshore resources with the requirement of local resources to run effective DCO sessions and gain the benefit of local, experienced resources mentoring client staff.

### 5. Monitor and report your team’s compliance to Pega’s Guardrails™ and Alerts

The Guardrails™ represent the best practices for configuring PRPC solutions in the model. Pega provides out of the box capabilities that enable team members to track compliance of the application configuration with our best practices. We recommend that teams monitor compliance to the Guardrails on a weekly basis and share the compliance scores with management on a regular basis through project governance. The project’s lead architect should establish a process to review all Guardrails violations and document the rare situations when a violation is justified. Compliance with the Guardrails™ will result in more maintainable, upgradable applications with significantly fewer defects than non-compliant applications.

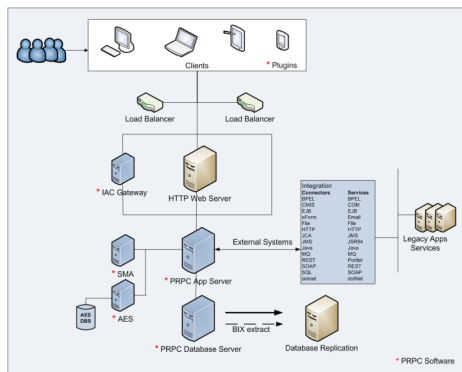
Alerts provide clarity on where a PRPC configuration is sub-optimal or error prone resulting in excessive response times, resource use, or system errors (examples include database queries retuning very large amounts of data, slow integrations with back end systems, non-performant interactions in the user interfaces, etc.). Regular, weekly reviews of the Alert logs via the Pega Automatic Event Service framework or Pega Predictive Diagnostic Cloud and remediation of application components generating the Alerts will result in more maintainable, performant, and scalable applications.



## 6. Use multiple environments to support implementation of a project

Pega recommends setting up the following environments as a minimum for optimizing project development activities:

- Development – Primary application development and DCO environment.
- System Integration Test – Environment to support the system test process. Also important for Alert log file analysis.
- User Acceptance – Environment to support user acceptance testing process.
- Performance / Staging – Environment to support performance and scale testing. Also, serves as a staging region for the Production region.
- Production



## 7. Test processes you will employ beginning with unit testing in construction through system, user, and performance testing

Pega recommends that our clients and partners begin the testing process early in the delivery lifecycle. This should begin with a team of businesspeople and IT developing a formal test plan strategy during the Inception phase of the project. The plan should cover unit, system, user acceptance, and performance testing. Once the project enters the first sprint or the Elaboration phase, the team should develop test scripts in parallel with the DCO sessions to ensure the application is completely covered by the test plan.

The team should review the Guardrails report weekly to monitor compliance to configuration best practices. The team should monitor the Alert logs weekly and use the alert logs to drive system improvements.

To complement functional testing, it is critical that the delivery team also conduct a set of tests to ensure the system will scale and perform at targeted volumes and within defined performance parameters. This process should begin during the project's build cycle with active monitoring and remediation of alerts and continue through the entire testing cycle. For more information about our recommended performance testing process, please refer to (<https://pdn.pegacom/performance/ten-best-practices-for-successful-performance-load-testing>) on the PDN.

## 8. Train and enable members of your organization to coproduce applications

Pega recommends that our clients build a PRPC configuration capability by co-producing applications with our partners. To effectively learn how to build PRPC applications, clients should train and assign two or three business people, business analysts, and developers to the partner project team. These resources are in addition to business and IT staff participating in the DCO sessions.

Role Description	Recommended Training	Project Activities
Business people from the line of business, highly knowledgeable about the business processes and able to directly represent business needs.	Business Architect Essentials	Act as a subject matter expert in the project team. Build decision tables, reports, correspondence templates, and certain portions of the UI.
Business Analysts – highly knowledgeable about the business and experience with a delivery methodology.	Business Architect Essentials DCO & Methodology Workshop	Develop future state process maps, optimize process flows and capture requirements using DCO. Build process flows, UI, reports and correspondence templates.
Developers – experience with Java or other traditional programming languages.	System Architect Essentials I and II	Configure PRPC including integrations to other systems.

### For more information:

Website:  
<http://www.pegacom/services/consulting>

Delivery@pegacom:  
<https://pdn.pegacom/deliverypegacom>

Douglas Kra—Blog:  
<http://www.pegacom/community/pegacom-blog/147016>



# Pega Consulting Keys to Success



PEGASYSTEMS, INC.  
One Rogers Street  
Cambridge, MA 02142-1590

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