Selecting and managing delivery partners for Pega project success

Introduction

Choosing the right partner for your Pega delivery project is crucial for its success. This guide provides insights into selecting a partner aligned with your project goals and managing the partnership effectively throughout the project lifecycle.

Why partner selection is important

A well-chosen partner can enhance project delivery by bringing in domain expertise and experience. Conversely, selecting an unsuitable partner can lead to delays, increased costs, and compromised quality and outcomes. By following this guide, you can navigate the partner selection process, ensuring the selected partner is aligned with the project's goals and equipped to deliver high-quality results.

Defining project delivery requirements

PROJECT SCOPE AND OBJECTIVES

Pega project goals may vary widely depending on the organization's needs. Common goals include automating business processes, enhancing customer service, improving operational efficiency, and personalizing client engagements.

Defining the project scope and objectives is the foundation of a successful Pega project. The scope outlines the vision of the project with specific goals, deliverables, and outcomes to ensure all stakeholders are aligned. Successful projects include a change management plan with training and activities to smoothly transition users to effectively adopt the new technology.

LEVERAGING PEGA GENAI BLUEPRINT

Pega GenAI Blueprint™ provides a great way to build clarity and define your Pega project goals, scope, and objectives. Pega GenAI Blueprint offers a structured framework for defining your end-to-end project and allows for real-time collaboration with partners to optimize resources and efficacy.

Pega GenAI Blueprint can be instrumental in selecting the right partner by:

- Starting the evaluation with a clear definition of requirements and project stages
- Better assessment of a partner's expertise aligned to the project scope
- Setting clear expectations for timelines and deliverables
- Focusing discussions on the project value and related design, implementation, and integration
- Enabling proactive risk management and alignment with strategic goals

While Pega GenAI Blueprint enhances the partner selection process, don't forget to consider foundational scope elements:

FUNCTIONAL CONSIDERATIONS	TECHNICAL CONSIDERATIONS
• Skills: Pega Certified Role Hub • Budget • Timeline	• Current system architecture • Pega's Situational Layer Cake approach for reuse and scalability • Pega's Center-out business architecture for seamless multi-channel experiences

Identifying potential partners for a Pega delivery project

Identifying a partner for a Pega delivery project can be broken down into five stages to ensure the partner has the requisite expertise and experience for the project's goals:

1. Partner selection criteria
2. Building the short list
3. Partner evaluation
4. Requesting a partner proposal
5. Partner selection

Partner selection criteria

Picking the right partner starts with selection criteria aligned to your project scope requirements. Most selection criteria approaches include both quantifiable and qualitative criteria. While your project will dictate your list, most Pega projects benefit when considering these areas in your selection process:

1. **Skills:** Evaluate Pega-specific expertise and general industry certifications, such as project management or networking.
2. **Experience:** Confirm the partner's track record of delivering successful Pega projects, especially those like your project in scale and complexity.
3. **References:** Consider the partner's market reputation, paying attention to client testimonials and references from comparable projects.
4. **Unique project attributes:** Assess the partner's knowledge of specific needs, such as industry regulations, legacy systems, or domain expertise.
5. **Other considerations:** Factor in any known attributes, such as their Pega partner program status, that could influence your decision to add them to the short list.

Building the short list

To develop a short list of partners for the evaluation stage, use the following research resources:

Procurement team: Leverage supplier data from your procurement team, including vendors who may be Pega Authorized, Specialized, or Global Elite partners.

Industry/product communities: Seek partner recommendations from user and developer groups, including Pega's active community, which can provide valuable insights.

Analyst reports: Consult independent reports from firms like Gartner, Forrester, Everest Group, and HFS to benchmark potential Pega partners against industry leaders.

Pega resources: Refer to Pega's detailed list of resources, provided later in this guide, to assist with partner selection.

After finalizing the short list, the evaluation stage begins by matching each partner's qualifications to the criteria.

Partner evaluation

The next stage in selecting a partner is scoring the short-listed candidates based on the project requirements outlined in the partner selection criteria. To ensure consistency in the evaluation, it's best practice to create a scoring rubric. Each criterion should be weighted according to its importance to the project's success, and a thorough evaluation may also include discussions with the partner and possibly issuing a Request for Proposal (RFP).

SCORING PROCESS
Start by evaluating how each partner measures up against the following detailed criteria:

SKILLS

Certifications: Assess the partner's Pega-certified roles, ensuring they cover the skills required for your project. Verify that these certifications are current to confirm their knowledge of the latest Pega technologies.

Pega technologies: Evaluate the partner's proficiency in designing, implementing, and optimizing Pega solutions using advanced technologies, such as Pega GenAI Blueprint™, Pega GenAI Knowledge Buddy™, and Pega Constellation.

Systems integration: Ensure the partner has robust experience integrating Pega with other systems (e.g., databases, security frameworks, and third-party applications), as this ensures smooth data flow and process integration.

Resource availability: Ensure the partner has the necessary skilled resources and the ability to scale the team as needed. Weigh the pros and cons of onshore versus offshore teams, considering time zones, communication challenges, and cultural fit.

Partner resource pool: Assess whether the partner's team consists of full-time employees or subcontractors, which can impact quality control.

Pega Center of Excellence (COE): A partner with a dedicated Pega COE can provide specialized resources, methodologies, and best practices. Assess the COE's capability, staffing, and its role in the project to determine how it can add value.

EXPERIENCE

Methodologies and deployment models: Determine if the partner uses methodologies that align with your project's needs. Does the partner adhere to Pega's delivery best practices?

Industry and domain expertise: Assess the domain expertise to be sure the partner understands the business processes and requirements unique to your industry.

Pega and partner relationship: The partner's standing in the Pega Partner Program is another indicator of their Pega relationship.

Client experience with Pega: Reflect on your organization's own experience with Pega. If you have strong internal expertise, you may require less from the partner in terms of Pega skills, and vice versa.

REFERENCES

Case studies and references: Review similar projects the partner has completed, paying attention to their problem-solving capabilities and outcomes. Contact previous clients to gather feedback on their performance and reliability. Pega can provide verification of certifications and project history.

OTHER CONSIDERATIONS

Organizational fit: Evaluate the partner's communication, responsiveness, and transparency during meetings, ensuring they will integrate well with your team and tools.

By carefully considering these elements in the partner evaluation, you will be prepared to select a partner that meets your technical requirements and aligns with your business goals and cultural values, ensuring a successful and seamless Pega project delivery.

Requesting a partner proposal

Requesting a proposal from potential partners for a Pega delivery project is a crucial step in the partner selection process. This process involves preparing a detailed Request for Proposal (RFP), soliciting comprehensive proposals from shortlisted partners, and evaluating these proposals to make an informed decision.

The first step in requesting a partner proposal is drafting a comprehensive RFP document. An effective RFP document should include, but is not limited to the following sections:

Project overview: Provide a high-level summary of the project, covering objectives, scope, key deliverables, timelines, expected outcomes, and any constraints. This gives partners a clear understanding of the project's overall goals.

Detailed requirements: This section should provide a detailed description of the project requirements, including functional and technical specifications. It should also outline any specific skills or expertise required from the partner, as well as any standards or best practices that need to be followed.

Evaluation criteria: Specify the criteria for assessing the proposals, including the weighting of each criterion (e.g., technical skills, pricing, experience). This helps partners understand how their proposals will be scored and evaluated.

Submission guidelines: Provide clear instructions on submitting proposals, including the required format, deadline, and any supporting documentation. Also, include a process for partners to ask questions or request clarifications during the proposal preparation phase.

Once the RFP document is finalized, distribute it to the shortlisted partners, giving them sufficient time to prepare and submit their proposals. During this period, it is important to maintain open communication with the partners, providing any necessary clarifications or additional information as needed. This ensures all partners have a clear understanding of the project requirements and expectations.

After receiving the proposals, begin the evaluation process. This involves reviewing and scoring each proposal against the evaluation criteria outlined in the RFP document. It is important to conduct a thorough and objective evaluation, considering all aspects of the proposals, including the partner's experience, skills, approach, and pricing.

Once the evaluation is complete, invite the top-scoring partners for further discussions or presentations to clarify any outstanding questions and to assess their fit with the project team and organizational culture. This final step helps ensure that the selected partner is not only technically capable but also a good match for the project's needs and the organization's values.

By following these steps, you'll be well-prepared to choose a partner who can deliver a successful Pega project and drive business value.

Partner selection

The final stage in the partner selection process involves conducting interviews, requesting presentations, performing due diligence, and ensuring alignment on project requirements and goals.

INTERVIEWS AND PRESENTATIONS

PARTNER INTERVIEW TOPICS

Project understanding: Assess the partner's grasp of project objectives, challenges, and the technical environment.

Team composition and expertise: Discuss the qualifications and roles of team members, ensuring they align with project needs.

Methodologies and processes: Ask partners to elaborate on their proposed methodologies, project management approaches, risk management strategies, and quality assurance practices.

PARTNER PRESENTATIONS

Presentations allow partners to showcase their proposed solutions and demonstrate their capabilities. Key representatives from the partner project team should participate, including the business executive, sales executive, project manager, Lead Systems Architect, and Business Architect. Partners should present their technical solutions, including system architecture, integration strategies, and any innovative technologies they plan to use. This stage also helps assess the fit between the two organizations.

DUE DILIGENCE

Due diligence ensures the chosen partner is dependable, financially stable, and capable of delivering the project.

Financial audits: Review financial statements, cash flow, profitability, and other key financial indicators to ensure the partner is financially stable.

Legal and compliance checks: Confirm the partner meets all legal and regulatory requirements, particularly for industry-specific standards.

Client references: Validate the partner's performance on similar projects by reviewing client testimonials and feedback.

ALIGNMENT ON PROJECT REQUIREMENTS AND GOALS

Before finalizing the partner selection, ensure complete alignment on project requirements, goals, and success criteria.

Confirm expectations: Ensure both parties agree on the project scope, deliverables, timelines, and roles.

Define success: Establish clear and measurable project success criteria, including key performance indicators (KPIs), milestones, and quality standards.

Agreement on communication and reporting: Agree on a robust communication plan, including regular meetings and escalation procedures to ensure transparency and accountability throughout the project.

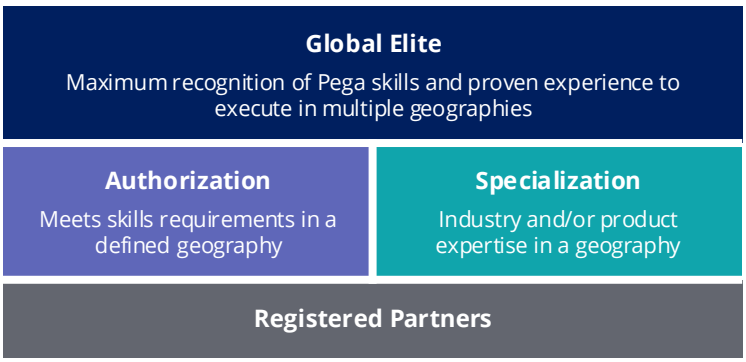
Pega & partner selection

HOW PEGA CAN HELP IN THE PROCESS

Pega offers a range of resources to help organizations research and validate partner information:

One Pega team: Engage your Pega Account Executive (AE), Consulting Solution Executive (CSE), or Partner Manager (PM) for partner information.

Pega Partners Program: This program helps identify partners with expertise in Pega technologies and industries. Pega recommends choosing an Authorization, Specialization, or Global Elite partner aligned to your specific project needs. To learn more, explore the Pega Partners Program here.



According to Jay McBain, Chief Analyst for Channels, Partnerships & Ecosystems at Canalys, "83% of customers consider specialization a top three criterion when selecting partners."

Pega Partner Finder: Search for partners based on various criteria to access their profiles, authorized geographies, program specializations, partner websites, and Marketplace solutions.

Pega GenAI Blueprint™: Check out the Blueprint partner showcase page to determine if a partner has created a Blueprint template for your industry or business process domain.

Pega Marketplace: A resource listing of more than 250 Packaged Service Offerings (PSO), accelerators, and components.

Pega Client Success Stories: These often include information about partners involved and can be found by attending Pega events such as PegaWorld.

RFP Preparation: Pega can provide advisory support during the preparation of the RFP with experts to help ensure the RFP aligns with Pega implementation best practices. Also, Pega can help review the proposals to provide insights on the technical feasibility and alignment with Pega's standards and methodologies.

Pega Consulting Services (PCS): PCS offers a range of implementation and advisory services including requirement analysis, system design, implementation, and post-deployment support. The Consulting Solution Executive (CSE) works with clients and their chosen delivery partner to increase delivery velocity and quality, while reducing implementation risks.

Project management and governance

A project management governance framework serves as the backbone to provide a clear set of guidelines and principles.

PROJECT MANAGEMENT	STAKEHOLDER ALIGNMENT	RISK MANAGEMENT
• Decision-making • Roles & responsibilities • Accountability	• Project goals • Timelines • Deliverables	• Early issue detection • Issue resolution • Transparency

A structured approach enhances the efficiency and quality of the project to ensure the final Pega application meets or exceeds expectations, delivering tangible business value. Project governance is the key to steering complex projects toward successful outcomes, minimizing the chances of delays, budget overruns, or scope creep.

Project governance is built on three key pillars: structure, people, and information.

KEY PILLARS OF PROJECT GOVERNANCE

Structure: Senior management must be committed and actively involved, dedicating time and effort to developing project objectives. The project governance structure should focus on the entire organization, not just the project team.

People: Effective governance depends on having the right project manager. The delivery team must have a project manager capable of ensuring senior management understands the project's activities. Objectives need to be clear, attainable, and sustainable.

Information: Consistent and effective information sharing is crucial. Open communication and real-time information exchange are vital for successful governance, involving regular reporting, meetings, and other forms of communication.

GOVERNANCE BEST PRACTICES

Multi-level governance: A solid multi-level governance framework can reduce the chance of project failure. As part of the framework, project teams must have access to the project and senior leadership to whom they can escalate issues blocking project success. These leaders are strongly encouraged to stay engaged in the project as it progresses.

Pega advocates for a 4-level governance structure. This structure is designed to enable the project team to adjust to unforeseen circumstances in a way that is visible and consistent to all project **stakeholders**.

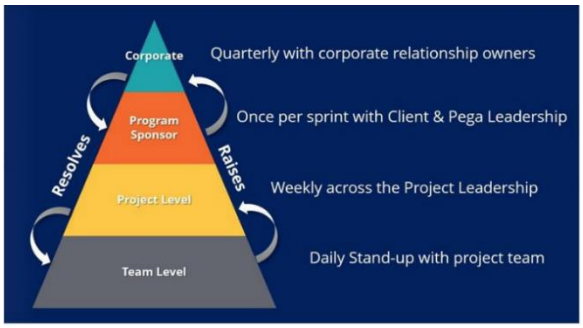


Diagram of the multilevel governance hierarchy.

ADDITIONAL PROJECT MANAGEMENT BEST PRACTICES

Iterative delivery methodology: An iterative delivery method is recommended for Pega implementation, typically following a 2- to 3-week sprint pattern with "show & tell" sessions at the end of each sprint to identify and resolve issues.

Optimized project team structure: Success hinges on having the right people in the right roles. Each Pega team should include individuals with unique expertise and experience, such as a Product Owner (PO) from your business team to manage scope and prioritize requirements.

Pega Center of Excellence (COE): Create a COE to provide leadership, enablement, support, and governance for all Pega Platform™ initiatives. Recruit both business and technical resources from your organization to seed your COE.

Communication and reporting: Establish regular communication channels and reporting mechanisms to ensure transparency and visibility into project progress. Advocate for regular bi-weekly cadences between you, Pega, and your selected partner.

Project change management: Implement a formal change request (CR) process to evaluate and manage changes to the project scope, schedule, or budget. Detailed requirements and discovery ensure fewer surprises and CRs later.

People change management: Institute a dedicated Change Management team to work with business teams from Day 1 to help them adapt to the new way of working.

Quality management: Define quality standards and implement processes for testing, validation, and defect management, adhering to Pega's quality assurance guidelines. Establish a testing and DevOps strategy to automate testing, deployments, and change integration.

Pega project registration: Encourage your partner(s) to register your project with Pega to leverage additional support and resources throughout the implementation.

Partner delivery success: Pega provides additional roles to support your partner in Delivery Success, including a Partner Delivery Success Manager (PDSM) and a Partner Success Technical Lead (PSTL).

For more details on Pega project governance and delivery best practices, see the Pega Digital Transformation Playbook.

Post-implementation retrospective

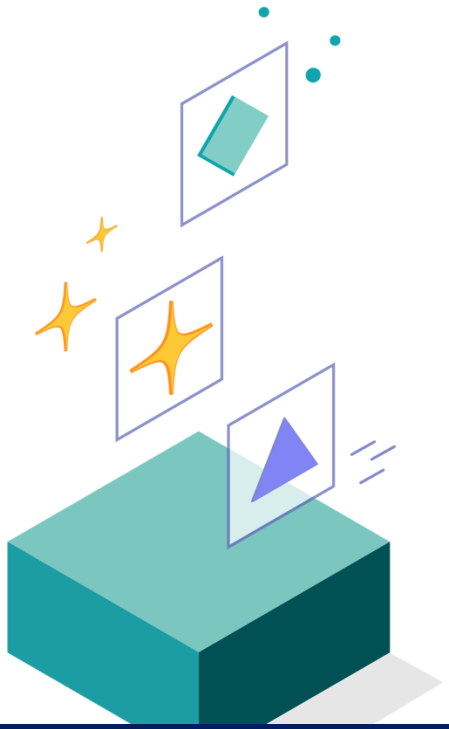
After delivering the first Pega application, take the following actions:

Review objectives: Assess whether the original objectives were met and identify areas for improvement. Document what went well, what did not, and potential improvements for the next delivery.

Monitor adoption: Monitor the business and customer adoption of your new Pega solution.

Review KPIs: Validate whether the application solution is delivering the expected value.

Continuous improvement: Use Pega Process Mining to identify areas to automate and optimize processes. Leverage your Pega COE to evolve development, testing, and deployment best practices, and build a library of reusable assets for faster subsequent deliveries.



Conclusion

The choice of a Pega partner is just as important as your choice to use Pega. Finding and selecting the right partner is critical in meeting the project's business objectives. Implementing the selection process outlined in this guide provides a consistent and reliable approach to reaching your goals.

To further ensure success with the team you have built, leveraging Pega GenAI Blueprint™ and applying project governance is crucial in delivering a Pega solution. With this solid foundation in place, the Pega Platform™ provides your organization with several ways to add value and do more. When your projects are completed, don't stop there, build a roadmap and backlog of work consistent with the business vision, seeking opportunities to enhance the value you bring to your business users and customers.

Pega is The Enterprise Transformation Company™ that helps organizations Build for Change® with enterprise AI decisioning and workflow automation. Many of the world's most influential businesses rely on our platform to solve their most pressing challenges, from personalizing engagement to automating service to streamlining operations. Since 1983, we've built our scalable and flexible architecture to help enterprises meet today's customer demands while continuously transforming for tomorrow.