



# Modernize with Pega

Future-proof your business and  
avoid technical debt



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# How to gain a competitive edge

Today, more than ever, enterprises are facing a quickly growing problem of managing technical debt while trying to future-proof their business. This design debt can grow and become a heavy burden on organizations if not addressed quickly and effectively.

Part of the drive to modernize a business is the migration to cloud – and more specifically, the idea that software isn't purchased on perpetual licenses but as a service. This shift has a huge impact on preventing technical debt in the future as upgrades, patches, and operations are all part of the service you purchase. Your investment in IT resources is not spent on maintenance – it's spent on driving the adoption of new features that add value to your business processes.

Over the past five years, Pega has made rapid advancements – evolving from BPM to intelligent solutions that leverage Kubernetes, Docker, and Pega Cloud®. Our cloud-native platform delivers an intelligence-driven service that seamlessly facilitates evolution of your business processes. The end result is faster delivery of critical, high-quality applications that drive enterprise modernization through a Center-out™ business architecture.

If you are still on Pega 7 or earlier, you are missing out on a generational shift in Pega technology, designed to bring your business ROI through continuous upgrades. These improvements deliver features that make your apps faster, smarter, and more scalable.

Pega technology has become increasingly simple thanks to low-code development. It's fast thanks to our as-a-Service model. And it's smart because of our difference-making, smart AI. Moving to Pega empowers CIOs to swiftly instill the latest technology across all operations. Enterprises that capitalize on new features effectively drive greater productivity and accelerate returns. Now you can effectively stimulate growth and successfully pay off technical debt – all at the same time.



**“By 2025, technical debt will continue to compound on top of existing technical debt consuming more than 40% of the current IT budget.”**

Gartner Research, Application Modernization Should Be Business-Centric, Continuous and MultiPlatform

# The business value you need and deserve

The modern market requires you to offer exceptional solutions and services to keep your customers satisfied. Our goal is exactly the same: to deliver the business value you need and deserve. We have successfully achieved this objective with every next release of the Pega Platform™, which you can run anywhere in Pega Cloud or a client-managed cloud.



## Digital experience

**Connect users to outcomes across any channel.**  
Simple to craft beautiful, engaging UX and open to build for your enterprise.

## Administration

**Manage your application** user access, security, DevOps, reports, and operations – all built-in and configurable with no code.

## Low code app development

Empower the citizen & professional developer to quickly **build & deploy** innovative & engaging cross-channel intelligent automation applications with powerful no-code & open low-code capabilities.



## Decisioning

**Maximize efficiency & interaction value** with our built-in always-on, AI-driven decisioning engine. Use data to drive processes, conversations, and actions.



## Automation

Connect humans and systems to **get things done and achieve outcomes** with dynamic, RPA- and AI-augmented case management.

## Reusable architecture & live data management

Manage the development complexity of “1000 processes” which are really 100 processes with 10 variations using an architecture that captures business dimensions in reusable layers, enabling logic re-use while allowing for specialization where required.

## Run Anywhere

by Pega in Pega Cloud or by clients on-premises or in a client-managed cloud

Figure 1: Pega platform

## In Pega 7, we enabled a number of difference-making features and capabilities, including:

- **Case Lifecycle Management** that enables breaking down a case into its stages and steps. It helps bring business and IT together to effectively visualize the process of getting work completed.
- **Pega Live Data**, which as a cornerstone of the center-out architecture, provides a way to effectively leverage data from across your enterprise architecture through data virtualization, declarative data access whenever you need it, as well as management of data composition, conditional data access and data caching strategies. Your application thus becomes resilient and able to quickly and easily adjust to changes in the integration landscape.
- **Next-Best-Action (NBA)** intelligence solution that provides a centralized decisioning capability for your organization to turn every interaction into an opportunity for optimizing value for your customer and your business. Real-time analytics and decisioning are leveraged to recommend the most relevant offer based on customer's needs and preferences.

## In **Pega Infinity**, we've even further matured our cloud services and expanded on our winning capabilities with a numerous cutting-edge additions, including:

- **Pega Cosmos design system** that helps teams easily achieve unique experiences in your business apps, personalized through the Pega Cosmos UX framework for developers, employees, and customers.
- **Pega Express design thinking** methodology that improves the way we build and deliver software, all while enabling you to create solutions rapidly, see value quickly, and scale widely across your enterprise.
- **Four distinct Studio workspaces** that allow teams to develop and manage applications in a way enabling team members to focus on the tasks that align with their expertise.
- **Pega Process Fabric** that enables connecting work from distributed processes and systems without sacrificing the business agility that comes with application independence.
- Simplified upgrade process and support for cloud-native architectures like **Microservices** and **Kubernetes**.



**“More than 59 zettabytes of data will be created, captured, copied, and consumed in the world this year.”  
Connecting the data you have in your organization to drive business outcomes is more important than ever.**

IDC, Worldwide Global DataSphere Forecast, 2020–2024: The COVID-19 Data Bump and the Future of Data Growth





# Get on Pega Cloud for increased security, improved scalability, and better support

Moving to Pega Cloud means you are always supported on your way to full digital transformation. To make this journey easier for you, we offer flexible options to help conveniently migrate to cloud. You can choose to manage your own implementation protected by our Cloud Choice Guarantee<sup>SM</sup> program or move to Pega Cloud for fully managed environments that are patched and upgraded to keep you current. Either way you prefer, you achieve increased security, improved reliability, enhanced scalability, and extensive support.



Figure 2: Benefits of staying current with Pega

Clients that decide to customize the product often make modernization hard on themselves. Customizations can lead to additional testing, or even conflicts with new releases of the Platform. In some cases, Pega has even incorporated the capabilities created by our clients to better meet their specific requirements. You can stay assured that our near-zero downtime upgrade process will keep you from falling behind whether you're already on Pega or still on client-manage cloud.

**“By 2025, 90% of current applications will still be in use, and most will continue to receive insufficient modernization investment.”**

Gartner Research, Application Modernization Should Be Business-Centric, Continuous and MultiPlatform

When adopting the client-managed cloud approach, Pega strongly recommends adopting Kubernetes architecture, as it is the future direction of our platform. In addition, clients are responsible for monitoring, setting up security, encryption, backup, and recovery. But we've made that easier – when you adopt Kubernetes, you can run and test updated Docker images and Helm charts to get the latest patches and feature releases.

While you can obviously count on our support while you're still on client-managed cloud, it's your team that will have to execute the patch and/or upgrade process based on your developed process. Contrarily, on Pega Cloud, this process is proactive to bring more flexibility to your IT processes. Rather than maintaining infrastructure to evolve your applications, your team can shift focus and capitalize on our enhancements like new communications channels with advanced user experience technologies or additional efficiencies through AI and robotics.

To better support your modernization efforts, Pega Cloud includes a 30-day production mirror to validate your apps against the latest release, and then perform a go-no-go action to push upgraded apps to all of your Pega Cloud environments.

If there's a no-go, we'll work with you to remediate any issues with the latest release to help ensure you always have access to the best of Pega.

Pega Cloud is not only a way for you to modernize your technology but also increase your control of finances and resources. Our cloud service scales with the ebbs and flows of your business as part of your subscription, without the added cost for unforeseen spikes in resources needed.

## Keep your environment secure

With the growth in new devices and communications channels, the threat landscape for digital systems continues to expand. Fortunately, you can rely on our proven track record in keeping organizations safe. We always strive to keep our clients on the cutting edge while ensuring they're sufficiently protected. It's effectively done [through Pega Cloud Services](#), designed to be a comprehensive service that provides consistent uptime, limitless scale, and the highest standards of security.

**Ongoing cloud infrastructure updates, frequent software patch releases, and regular software upgrades are all part of Pega's standard maintenance policy. They're in place to increase security and ensure seamless access to the latest features and capabilities.**

As part of the service, Pega continuously makes sure you stay current and provides ongoing patches during maintenance windows with near-zero downtime. This means you are always using the latest performance and security improvements with the most up-to-date features and functions.

Zero-downtime cloud infrastructure enhancements bring several significant benefits to your organization. On Pega Cloud, your business agility is well protected and operational efficiency undisturbed through fast start-up times after updates, with little to none interruption to your service. We keep you extensively informed throughout the whole update process, including notification before it begins and after it's complete.

This transparency allows you to better decide on the best use of resources and move them within and between teams to keep a strong focus on your apps and data. Regular cloud infrastructure improvements give you the latest security and performance benefits, service enhancements, and new capabilities without changing the Pega software running in your Pega Cloud environment.

Cumulative zero-downtime software patch releases include important security, supportability, and reliability improvements and bug fixes to keep you current. For your convenience, patches don't require a cloned environment for validation as their installation includes only rule changes observed between the patch and the current Platform version.

Software upgrades are backwards-compatible to shorten the time needed for you to take advantage of the latest major or minor Pega Platform versions and CRM applications running in Pega Cloud environments. These software changes include the latest security updates, capabilities, feature enhancements, performance improvements, and supportability enhancements.

Keeping your environment secure on Pega Cloud enables you to shift your focus to the business operations, freeing valuable resources within IT teams. You naturally are always supported, regardless if we manage upgrades for you or if you manage Pega Cloud yourself.

On Pega cloud, we do the heavy lifting for you and push the latest patch release to ensure your security. When you're managing Pega on your own, we help you by making the patches and updates available to subscribers as updated Docker images and Helm charts. Either way, our objective is that you always stay current and in line with the leading global standards.



## Develop scalable apps available when you need them

To successfully compete in the current market, you need deployed solutions, underlying systems, and launched apps to be reliable, scalable, and – most importantly – available when you need them. Pega Cloud is built to ensure all that, enabling your Platform architecture to evolve and effectively meet the demands of today's heavily digital world. We provide a highly resilient and fault-tolerant architecture that includes a 99.95% availability SLA for your Pega solutions.

Pega Cloud can be deployed into numerous AWS regions to better meet your unique business requirements while ensuring resiliency and scale. You select the region where you want it deployed, either to be located closer to users or keep your operations in line with [data localization requirements](#), including [General Data Protection Regulation \(GDPR\)](#) and [California Consumer Privacy Act \(CCPA\)](#).

Pega Cloud keeps your apps reliable and available when needed. Our disaster recovery plan is proven to work, effective, and empowers your team to rapidly respond and efficiently recover the affected service. Scale at ease, knowing that both your customers and developers are satisfied with the quality and availability of your applications.

## Get support every step of the way

We are deeply committed to ensuring all client needs are covered and exceeded. Modernizing with Pega significantly reduces time to market, lowers maintenance costs, increases the development team's job satisfaction, and allows to more accurately examine reasons for employee turnover. And we'll be helping you achieve all that with no stringent end-of-life rules strictly enforced.



Figure 3: Benefits of modernizing in Pega cloud



With client success always in mind, we help you get the best of Pega either through our fully managed offering Pega Cloud Services or a client-managed cloud from a selection of leading cloud infrastructure providers. Our application delivery method is flexible to seamlessly adapt to the changing requirements of your business

Pega's integration strategy keeps evolving to better facilitate modern and secure integrations. When running on Pega Cloud, you have a single point of support for everything from adopting new features to troubleshooting a change in performance. If your applications run on client-managed cloud, we'll be there to help with Pega software and answer questions about updating your Docker Images and Helm charts.

## Product lifecycle policy that gets you the best of Pega

Effective cloud services management is crucial for successful cross-enterprise digital transformation. You can only plan your operations effectively if a cloud provider has a transparent and client-centric product lifecycle policy in place. If not, you'll end up with a steadily accumulating technical debt. For clients on Pega Cloud Services, we have a [policy and approach that helps avoid that trap and gets you the best of Pega](#).

The Pega Cloud lifecycle policy is thoroughly planned and developed to empower our clients and ensure they can keep gaining a competitive advantage. From June 1, 2020, Pega adheres to the latest industry standards and supports new releases of the Platform on Pega Cloud for 12 months. For clients who run on premises or in their own cloud, the policy applies to support provided as, for example, patching and hotfixes. By introducing Pega's upgrade policies, we can better keep you current and effectively help you eliminate technical debt.

# Conclusion

Organizations that modernize in cloud do so to ensure their applications run smoothly and with fewer disruptions. And that's exactly what you gain on Pega Cloud – we support the upgrades and operations to better drive both your business growth and client satisfaction. Pega Cloud Services is designed to relieve the operational burden on your IT teams so they can focus on apps and client data.

In short, if you have a challenge with apps – you have just one call to make – and Pega will be there for you. After all, who best to run your Pega applications than Pega? Let us take on the task of running those applications, while you focus on running and growing your business.

Regular updates are part of the service and, since we have a process to upgrade your applications with each release, keeping you current is on us. This also means your present and future needs will be fully covered because Pega provides the reliability and scalability you need to gain a competitive edge.

**Forrester Consulting interviewed 20 clients with years of experience using Pega's core offerings. These Total Economic Impact<sup>™</sup> studies documented results like 589% return on investment, \$677M in revenue growth, \$11M in cost savings, and more.**

With the service, you get access to the best of Pega all of the time. If you're on a version that predates Pega 7, you make an instant technological and organizational leap forward. You get Case Lifecycle Management, Live Data, NBA solution, and RPA from Pega 7, as well as all the advancements of Pega Infinity, including improved upgrade process, Pega Studios, the Express methodology, a modern and containerized Platform, Process Fabric, and Cosmos UX. Modernize with Pega to effectively future-proof your business and eliminate technical debt.

What matters most, we are here for you to help plan and execute your whole journey. While Pega's cutting-edge technology and software differentiate us, it's our people and processes that make us true change agents. We have the experience and knowledge how to get your enterprise to the desired goal, absent of technical debt. The future always starts now, and we would welcome the opportunity to work with you to plan your modernization journey.



We are Pegasystems, the leader in software for customer engagement and operational excellence. Our adaptive, cloud-architected software – built on the unified Pega Platform™ – empowers people to rapidly deploy and easily change applications to meet strategic business needs. Over our 35-year history, we've delivered award-winning capabilities in CRM and digital process automation (DPA), powered by advanced artificial intelligence and robotic automation, to help the world's leading brands achieve breakthrough business results.

For more information, please visit us at [www.pegacom](http://www.pegacom)