When assembling your team, always look for certified resources with a deep level of knowledge, experience, and leadership skills. Business and technology are equally important. At a minimum, the business representatives should understand the as-is process and existing related applications and work practices. More importantly, the business must have a vision of the future process, a business strategy, and the leadership skills required to transform and improve the business to meet its desired goals.

### Key Pegasystems Roles

The ***Lead Business Architect*** is often your linchpin of solution delivery success. A good candidate must be business savvy, as well as fluent in the chosen methodology and our Applications. Business Architects need a deep appreciation of the power of process and an intimate understanding of how change occurs inside an organization.

Individuals fulfilling the lead role typically have completed several successful Pegasystems projects. They must be well-versed in Business Process Reengineering (BPR) principles and practices and continuous improvement methodologies such as Lean or Six Sigma®. Look for accomplished and diplomatic individuals who are capable of building an effective bridge between the business and IT.

We also recommend that you include a ***User Experience (UX) Architect*** on your team as early as possible, ideally as part of the DCO sessions. Depending on the complexity of the UI requirements, a UX Architect can be involved for just a few weeks or participate as a full-time team member. While UX activities can be incorporated in many different ways, we recommend that you focus on them early enough to realize a positive impact. Waiting too long to consider UI or its impact on user adoption will significantly impair the ability for UX to influence design.

In addition:

* All Pegasystems-led projects have an **Engagement Lead** (EL) assigned, with program/project management responsibilities.
* Any Pegasystems projects (regardless of who is leading the effort) have a **Lead System Architect** (LSA) assigned, with technical responsibilities.

### Program and Project Management

| **Role** | **Responsibilities** |
| --- | --- |
| **Engagement Lead (EL)** *(Client or Partner Resource* | Day-to-day responsibility for running the project. With Business Sponsor, develops the project definition. Ensures project is delivered on time, to budget, and to the agreed quality standard. Ensures project is effectively resourced and manages relationships with a wide range of groups (including all project contributors). Manages consultants, allocating/utilizing resources efficiently and maintaining a co-operative, motivated, and successful team. |
| **Technical Engagement Lead (TEL)***Client Resource* | Works with the PM to manage the program, project, and Sprints/slivers. Works with/manages the team on a daily basis to ensure tasks are well-defined and resources know which tasks are theirs. Manages the Project Plan and Project Status Reports to ensure all resources understand project statuss. Facilitation resource for Project Governance. Manages schedules, budgets, resources, timelines, and change controls. Reports on all on a regular basis. |
| **Project Sponsor (PS)***Client, Partner, & Pega Resource* | Commissions others to deliver the solution and champions its cause throughout the project lifecycle. Normally a senior staff member with a relevant area of responsibility that will be affected by the outcome. Involved from the start, including defining the project in conjunction with the PM. Ensures the project is actively reviewed. Has either played this role previously or needs a mentor.  |
| **Steering Group/Board/Committee***Client, Partner & Pega Resource* | Oversees project progress and react to and resolve any strategic problems. Normally consists of senior executives and managers. |

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| Pegasystems **Practice Leaders (PLs)** are accountable for the successful business development, solution delivery, and client realization of benefits across their assigned portfolio of accounts. They work closely with the Program and Project Management team members to ensure proper governance, issue escalation as needed, and overall delivery team success. |

### Technical and Business Architects Roles

| Role | Responsibilities |
| --- | --- |
| **Lead System Architect (LSA)** | Ensures that the application quality and design are of the highest standards. Ensures that the application meets current business needs, but also supports future expansion for new features down the road. Responsible for the Enterprise Class Structure and the overall application design. |
| **Lead Business Architect BA)** | Ensures that the business requirements, Use Cases, and objectives are being addressed throughout the implementation lifecycle. Interfaces regularly with the business to capture the application objectives and requirements. Facilitates and helps business resources prepare for DCO sessions. Manages the tasks and priorities of all Business Architects and ensures artifact quality. |
| **Senior Business Architect (SBA)** | Responsible for the creation, quality and acceptance of User Stories and Use Cases. Links the business requirements to specifications. Application expert that identifies gaps between the product(s) purchased and the business need. If no product was purchased, responsible for business process creation. Business champion and Thought Leader. |
| **Senior System Architect (SSA) / System Architect (SA)** | Responsible for the majority of the application configuration. Takes direction from the LSA for tasks, priorities, design, and best practices. |
| **User Experience (UX) Architect** | Conceptualizes, creates, and communicates user-centered interaction and visual design ensuring that the solutions are effective, innovative, and usable with the business needs in mind and levering Pega capabilities. the UX components of the solution. Ensures that effective, innovative, and usable solutions are created with user and business needs in mind. |

### Specialized Business Resources

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| **Role** | **Responsibilities** |
| **Subject Matter Experts (SMEs)** | Individuals with a consummate knowledge of the operational mechanics of the as-is process and an appreciation for transforming process in order to leverage Pegasystems capabilities. SMEs also need a deep appreciation of the macro-level business objectives. One SME per major impacted business area. |

### Specialized Technical Resources

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| **Role** | **Responsibilities** |
| **System Administrator** | Manages and supports the IT system environments. |
| **Testing Lead** | Creates the test plan and defines the test strategy and scenarios. Each Scrum team needs one resource to continuously test User Stories from creation until development is complete.  |

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| Regardless of the chosen methodology, keep the development team size small and nimble. The ideal size of a Scrum team is 5-7 members (excluding business resources such as Process Owner and SMEs). Larger teams can easily become bogged down by communication issues or lack of clarity. |

## Client Roles and Responsibilities

In addition to the core members, Pega teams require the support of several groups from the client IT organization.

| **Group** | **Key Functions** |
| --- | --- |
| **Program or Project Management Office (PMO)** | * IT program/project governance
* Program tracking/reporting
* Project financial tracking/reporting
* Management of risks, issues, and dependencies
* Change control management
 |
| **Release Management** | * Manage solution releases into QA/Test and UAT
* Stage performance and production environments
* Manage build script and environment migration processes for application configuration
 |
| **Enterprise Support** | * Shared services (document management, data services, etc.)
* Finance
* Risk management
* Information security
* Supply chain/vendor management
 |
| **Infrastructure** | * Environment (HW/SW) provisioning
* Environment management (middleware, DBA)
* Capacity planning
* Data Center management
 |
| **Training** | * Ensuring user readiness
* Preparing training materials and job aids
 |
| **Testing** | * Functional and automated testing for application features
* Regression testing
* Test plan and script preparation/ownership
* Defect recording, tracking, reporting, and production readiness assessment
* Quality Assurance
 |
| **Architecture** | * Develop technology and architecture migration roadmaps
* Develop conceptual and logical architecture views
* Assess architecture governance and alternative architecture
* Partner with development teams on key technology initiatives
* Application/technology stack rationalization
 |
| **Change Management** | * Own process changes, impact assessment, process design, and implementation
* Steer projects through Enterprise Change Management approval toll gates
* Overall status reporting, risk mitigation, and communication
* Define, track, and report on project controls and metrics
* Manage user acceptance testing
 |
| **Production Support/Administration** | * Level 1, 2, and 3 support for applications in production
* Resolve user questions, troubleshooting problems, triaging and gathering issue data
* Communicate/escalate production outages and critical issues impacting users
* Hand-off to development support teams on issues encountered in production
* Coordinate resolution efforts for critical production issues
* Manage disaster recovery efforts and system recovery after failures
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| To learn more about role-based learning paths, certifications, and areas of specialization, visit Pega Academy on our web site at www.Pega .com. |

## Engagement Models

In the early stages of CRM adoption, you may not have all of the necessary skills in-house to fill the required team roles. We recommend that you engage with one of our Strategic Alliance Partners or Pega Consulting to ensure that the new paradigm takes proper root. As your organization’s level of CRM maturity advances, the appropriate resource mix will change accordingly.



### Pega-Led Projects

We recommend that you entrust project leadership to one of our Strategic Alliance Partners or Pegasystems during the early phases of Pegasystems technology adoption, until you have achieved implementation maturity and self-sufficiency.

### Client-Led, Partner- or Pega-Facilitated Projects

As your organization gains experience and you have groomed in-house technical leadership, you will begin to take the lead on Pegasystems projects. At this point, you should have a solid cadre of System Architects who have taken the Pegasystems technical training curriculum, with some of them achieving CSA certification. Your business analysts and project managers have attended Business Architect Essentials training, experienced one or more project iterations, and can confidently apply our Agile methodologies and DCO tools.

At this point, your continued success depends on your in-house team taking advantage of advances in Pegasystems methodology, tools, and product features. We recommend bringing in a small number of leaders from one of our Strategic Alliance Partners or Pegasystems for this purpose.

### Client-Led, Partner- or Pega-Supported Projects

Even after expanding your in-house Pegasystems technical leadership, you may find it beneficial to bring in Partner or Pega Consulting resources to deliver specialized advisory services such as Design Reviews, Usability Reviews, or Production Performance Inspections.

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| For more information or to discuss your requirements, contact the Pegasystems Professional Services Practice Leader for your engagement. |

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## Working with Our Partners

Pegasystems is committed to delivering joint solutions resulting in positive outcomes – regardless of who leads or participates on the team. We see working with our Strategic Alliance Partners as a triple win for the Partner, Pegasystems, and the client. We have strong long-term relationships with our Partners built on mutual trust and business integrity.

As members of the Strategic Alliance Program, our Partners commit to the same level of expertise and certification that you receive from Pega Consulting. Our enablement and certification programs provide our Partners with the latest methodology tools, product enhancements, and platform features. Their teams also have access to the Pegasystems Proposal Clinic, which validates proposed solutions for business and technical fit.

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| For more information about the Partner community and the Strategic Alliance Program, visit the Partners area on our web site at www.Pega .com. |

## Have Confidence in Competence

You are ultimately responsible for ensuring that the resources you engage to implement Pegasystems technology are competent for your industry, in the product, and in the delivery methodology of your choice. Look for specific skills and examine the resume of each person. We recommend that you request each individual’s certification status. Finally, remember to assess the individual’s Pegasystems experience with other clients.

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| You can also use the Verify Certification Tool on the PDN to verify someone’s certification status. |

## Utilizing Off-Premises Resources and Partners

Utilizing an off-premises model for entire projects or parts of projects can add significant value. Off-premises resources can lower costs and increase productivity as a result of distributed development across multiple teams. However, you must build in the supporting environment from the beginning. Introducing off-premises resources as an afterthought or in an attempt to get a late project back on track is risky. Instead, view these resources as part of the project from the outset so they understand the strategy and are an integral part of the team.

Resource cost comparisons always impact the choice of the staffing model. However, they should not be the sole decision criteria for an off-premises model. Hourly rates for off-premises resources are often considerably lower than those for comparable onshore resources. However, realize that each off –premises project manager, technical lead, and business lead typically requires an onsite counterpart, which can impact administrative and project management costs.

A follow-the-sun approach can lead to higher productivity, with onshore and off-premises teams working hand-in-hand. However, the geographic and time zone separation of the business and requirements gathering from development and testing may introduce other risks.

Advantages of incorporating off-premises resources:

* **Better usage of the 24-hour clock.** Tasks on the critical path can be worked on by two shifts of consultants, depending on your location and that of the off-premises team. This practice can reduce or eliminate tight deadlines.
* **Budget savings.** On average, offshore labor rates are significantly lower than comparable rates onshore.

Complications of using blended onshore/off-premises teams:

* Conference calls require conscious organization across time zones and may not offer enough time to discuss everything in detail.
* Regular project communication between all team members requires coordination. Off-premises team members must be included in all key meetings (Daily Standup, Retrospectives, and so on).
* All team members must have a clear understanding and knowledge of what is to be delivered in order to interpret User Stories or requirements correctly. Pega Agile Workbench (DCO) and Agile Studio are helpful.

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| Successful projects that rely on significant offshore resources plan for excellent communication and collaboration – social networking and other collaboration tools, easy access to good audio visual facilities, and a schedule that ensures opportunities for team member overlay. Pegasystems would be happy to share its own experience internally with Scrum and this model. |

### Identifying the Right Project

Carefully select Pegasystems projects (or portions of projects) that are appropriate for incorporating off-premises resources. Be sure that the business objectives, Use Cases, User Stories and Process Flows have been captured clearly and are not ambiguous.

Many of our clients use off-premise resources to handle tasks such as Quality Assurance (QA), defect fixing, enhancement requests, and upgrades. You may also choose to use them effectively to develop interfaces to other systems, particularly when the solutions use standard messaging formats or protocols.

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| Pegasystems tools such as Pega Agile Workbench (DCO), Agile Studio, and project sizing tools to help you assess fit for incorporating off-premises resources. It incorporates criteria such as methodology, team size, flexibility of timeline, and budget to objectively analyse suitability. |

### Resource Models

Some of our clients use a traditional resource model that includes an onsite outsourced resource working with a team of 5-8 offshore developers. The off-premises team typically includes an off-premises lead developer (LSA) responsible for overseeing the day-to-day deliverables. This individual is also the central point of communication with the onsite technical team.

Other clients use a “pod” model in which they assign a team lead from their internal staff to manage a small team of off-premises developers. In this model, the off-premises team also includes a senior technical team lead. However, the model is less hierarchical and places strong emphasis on regular communication with the entire team. Ideally you would have the team lead at the planning and retrospective stages and any key meetings. Because of geographical time differences, most clients that use this model establish one or two daily check-in calls with their offshore team members and a weekly project plan review. For the daily call, do your best to accommodate the majority of time zones.

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| As with all projects, effective governance and communication with the off-premises team is critical to success. |