**Purpose:**

The following document outlines the Tasks and Agenda items that should be presented and discussed as part of a Pega7 Project Kick-Off. The project Kick-Off meeting is the first of most likely only a few meetings where the entire team will be present, so it is vitally important that it be managed well. It is Pega’s first chance to really gather everyone as a team and to set the stage for the upcoming project.

**Who Should Attend?**

A meeting invite should be sent to the entire project team including all client senior executives, business sponsors and project participants. From the Pega perspective, the invite should include the Account Executive, Practice Leader, Engagement Leader and the Project Team. The invitation should also be extended to the Practice Directory and Regional Leader. If a Partner team is involved, the entire Partner Engagement Team should be required attendees. It is critically important that everyone do their best to attend in person.

**Duration:**

The Entire Project Kick-Off meeting will most likely take up a full 8 hour day with a 1 hour break for lunch. The meeting should be broken up into 2 parts. The first part which should last about an hour should represent the proverbial “Cutting of the ribbon” ceremony. This part of the meeting should be attended by the entire team including all the senior executives both from the client and Pega. The second part of the Project Kick-Off meeting will be more focused around the actual project and the roles and responsibilities each member will play. This part of the meeting will usually last the remainder of the day.

**Best Practices:**

Please make sure to plan ahead and also reserve the following pieces of equipment well in advance of the meeting:

1. Develop a PowerPoint presentation with Pega and Client Logo
2. Discuss with Client and/or Partner any potential content they may want to present
3. Assign a meeting Facilitator and time keeper
4. Conference Room Large enough to hold the entire attendee list
5. Projector and screen if required
6. Conference Bridge and Webinar information
7. Internet access if remote participants
8. Video feed for remote attendees

| Food/Drink/Snack  **AGENDA** | | | |
| --- | --- | --- | --- |
| Start Time | Duration | **Topics** | **Presenter(s)** |
| 9:00 am | 10 | ***Welcome***   * Facilitator introduction * Primary Business Stakeholder introduction * Key Technical Stakeholder introduction * Key Partner Introductions | Facilitator |
| 9:10 am | 35 | ***Project Overview***   * Current Business Goals/Objectives * Why is this project being funded? * Roles and Responsibilities * General Scope of the Project * Impacted systems * What does Success Look like? * Project Assumptions * Key Project Risks | Primary Business Stakeholder |
| 9:45 am | 15 | Break |  |
| 10:00 am | 15 | ***Impacted Systems***   * Introduction of Key Project Stakeholders   + Areas of responsibility   + Discussion on areas that will be impacted * Pega7 Solution Discussion | Primary Business Stakeholder |
| 10:15 am | 105 | ***Project Structure***   * Reoccurring Scheduled Meetings   + Project Status Meetings     - Structure/Template     - Start Date     - Frequency, Time, Duration     - Attendee list   + Governance Meetings     - Structure/Template     - Start Date     - Frequency, Time, Duration     - Attendee list * High Level Project Time line   + Short-Term Deliverables   + Long-Term Plan * Roles and Responsibilities   + Project Organizational Chart * Key Dependencies   + Interfaces and other non-Pega deliverables * Tools to be used   + Project Delivery (Agile Studio, Jira, etc.)   + Bug Tracking | Facilitator |
| **Noon** | 60 | **Break for Lunch** |  |
| 1:00 pm | 120 | * Implementation Methodology * Walkthrough, Best Practices * System Environment Architecture (QA, Dev, prod., etc. | Facilitator |
| Break | 15 |  |  |
| 3:00 pm | 60 | ***Standards and Processes***   * Communication Plan   + Collaboration Tools   + Weekly Status Report * Issue/Risk Tracking process * Timesheet Tracking * Change Control/Management Plan * Testing Strategy | Facilitator |
| 4:00 pm | 30 | ***Engagement Details/Policies***   * Travel expectation   + Expenses (hotel, car, etc.)   + Business Hours   + Onsite/Offsite * Enablement needs | Facilitator |
| 4:30 pm | 30 | * Takeaways & Next steps * Questions and Answers | Facilitator |
| 6:00 pm |  | **Team event** |  |

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