



Pega Consulting Services

*Software Implementation, Vendor Expertise
and Advisory Services*

G-Cloud 15

... Lot 3 Cloud Support

Contents

1. Introduction.....	3
Company Overview	3
Value Proposition	3
What the Service Provides	5
Social Value	6
Overview of the G-Cloud Service.....	7
Expert Advisory Services	10
Subscription Advisory Services.....	12
2. Data Protection.....	13
Information Assurance.....	13
Data Back-Up and Restoration	13
Business continuity statement/plan	14
Privacy by Design.....	15
3. Using the service.....	15
Ordering and Invoicing.....	15
Availability of Trial Service	16
On-Boarding, Off-Boarding, Service Migration, Scope etc.	16
Training.....	17
Implementation Plan.....	18
Service Management.....	18
Service Constraints.....	19
Service Levels.....	19
4. Provision of the service	20
Customer Responsibilities	20
Technical Requirements and Client-Side Requirements.....	21
Outcomes/Deliverables.....	21
After-sales Account Management	21
Termination Process	22
5. Our experience	23
Case Studies.....	23
Clients.....	24
Contact Details.....	24

1. INTRODUCTION

Company Overview

Pegasystems Limited (Pega) is a leading provider of low-code platform technology for AI-powered decisioning and workflow automation. Established in 1983, we deliver innovative software that helps organisations crush business complexity through our unified platform. Our technology enables large enterprises to build secure, scalable, and maintainable applications that drive operational efficiency while enhancing buyer experiences. Pega's solutions are deployed across multiple sectors including government, healthcare, financial services, telecommunications, and insurance, helping organisations streamline service delivery, boost efficiency, and adapt quickly to changing requirements.

Headquartered in Cambridge, Massachusetts, Pegasystems operates globally with offices in over 30 countries, serving some of the world's most recognised brands and public sector organisations. For more than four decades, Pega has pioneered technologies that combine workflow automation, case management, and advanced AI capabilities; including generative AI for insights and rule-based governance for predictable outcomes. Our low-code approach empowers organisations to innovate rapidly, reduce technical debt, and deliver personalised experiences at scale. With a strong commitment to security, compliance, and interoperability, Pega supports mission-critical processes across industries, enabling buyers to achieve measurable business outcomes and accelerate digital transformation.

Value Proposition

The UK public sector faces increasing pressure to deliver efficient digital services while managing limited resources, adapting to policy changes, and meeting growing citizen expectations. Pega addresses these challenges through a flexible, unified platform that accelerates application development, automates complex processes, and orchestrates intelligent decisioning. By combining generative AI for insights with rule-based governance, Pega delivers predictable, trustworthy AI outcomes that enhance operational efficiency and citizen engagement. Our technology breaks down data silos, enables end-to-end automation, and provides consistent services across channels—all while reducing technical debt and supporting rapid adaptation to policy changes. This empowers government organisations to achieve better outcomes with existing resources, scale digital transformation securely, and deliver personalised experiences that meet the evolving needs of citizens.

Pega Consulting are a global team of advisors and implementation experts that work with you and your preferred system integrators to deliver best-in-class solutions. Through our expert guidance and programme leadership, we create efficient, agile, and scalable Pega programmes, ensuring you're getting maximum value out of our

technology. Our subscription services help you quickly establish an [operating model](#) that supports the autonomous enterprise.

Our services also help you to quickly get up and running with essential elements of a mature Pega practice. Our accelerator services are short-term engagements that leave a lasting impact, combining Pega with [DevOps](#) best practices so your development and deployment processes drive quality, consistency, and speed; and you can jump start or mature your [Pega Centre of Excellence](#) (COE) for governance, standards, and savings across your Pega programme.

We also focus on Outcome-driven applications, rapidly developing Pega applications that deliver results and evolve with the needs of your business. We work side by side with your team, demonstrating the benefits of building according to Pega best practices; and we offer application-level assessments and reviews that drive excellence in design, performance, usability, modernisation, and more.

Pega's delivery approach centers on proven methodologies that transform how organisations build and deploy applications. At the heart of this approach is the combination of design thinking, agile practices, and purpose-built accelerators that dramatically reduce time to value.

Blueprint Delivered represents our latest advancement in rapid application delivery. Using Pega GenAI Blueprint technology, discovery and solution design can be completed in days rather than months. The methodology enables real-time collaboration between business and IT stakeholders, who work together to define and capture your vision, describe prioritised processes including objectives, process steps, key functionality and expected outcomes (KPIs) in a Blueprint. Through joint workshops, the approach encompasses collaborative discovery, detailed elaboration of the technical landscape (environment, integrations), and creation of a jointly agreed delivery plan. This combination of delivery expertise with rapidly-evolving GenAI capability enables vastly accelerated identification and exploration of use cases, reduced time to value through faster capture and agreement of high-level business requirements, reduced delivery costs, and increased business-IT collaboration.

Pega Express continues to provide a proven, light delivery approach using Pega's low-code experience, best practices and Scrum to deliver meaningful outcomes quickly. The methodology comprises four phases: Discover (focus on outcomes using design thinking techniques), Prepare (kick-off your project), Build (speed and agility through iterative development), and Adopt (deliver buyer value). This approach is built on six core values: solving business problems, designing great experiences, collaborating effectively, accelerating time to value, enabling agility and scale, and leveraging the power of Pega. Even as Pega Express evolves, these fundamental principles remain relevant for buyers who may not be in a position to adopt Blueprint immediately.

Both approaches leverage Microjourneys to break complex buyer journeys into smaller, more manageable pieces focusing on people, the actions they take, and the channels they prefer. This reduces risk, enables clear scoping, and supports rapid delivery of Minimum Loveable Products (MLPs) typically within 60-90 days.

Key accelerators that add value across both approaches include:

Directly Capture Objectives (DCO) enables project teams to directly enter business requirements into Pega, eliminating translation errors, facilitating direct engagement of business and IT resources around visible working models, and enabling optimal review of work progress.

Co-production ensures your team works shoulder-to-shoulder with Pega experts, learning by doing and with contextual coaching support. This builds in-house expertise, produces higher quality outcomes by avoiding misinterpretations, and promotes critical business-IT collaboration.

DevOps and Automated Testing build quality into the delivery process from the start. Pega's Deployment Manager and automated test suite enable teams to test early and often, identifying and fixing issues when they are least expensive to address. The automated deployment pipeline handles build, deploy, test, and release processes, creating standardised deployment that delivers predictable, high-quality releases.

Pega's No-Code / Low-Code Platform accelerates development using visual metaphors instead of traditional coding. Built-in guidance and visual low-code capabilities enable business developers to continue maintaining and enhancing functional breadth and depth after the initial delivery, providing long-term value and reducing dependency on external resources.

What the Service Provides

Under Lot 3 (Cloud Support), Pegasystems will deliver comprehensive Implementation Services to accelerate application delivery and build buyer capability. This includes two proven methodologies: Blueprint Delivered, a GenAI-powered approach that compresses discovery and design from months to days, and Pega Express, an agile framework for rapid outcomes. Both leverage Microjourneys to deliver Minimum Lovable Products within 60–90 days, supported by flexible engagement models (Pega-led, partner-powered, or client-led). Complementary Expert and Subscription Advisory Services provide strategic guidance and accelerators for design, architecture, DevOps, citizen development, and GenAI innovation. These services ensure faster time-to-value, reduced costs, and sustainable capability growth. They are designed to work in harmony with the product purchase, maintenance, and user support covered under Lot 2b (Software as a Service), ensuring a seamless end-to-end experience from technology acquisition through to successful adoption and ongoing optimisation.

Social Value

Pegasystems demonstrates proportionate commitment to social value delivery across the four identified PPN002 themes. Our initiatives are governed through established corporate programmes with measurable outcomes tracked through annual reporting frameworks and published in our annual Impact Report.

Kickstart Economic Growth

Pega supports economic growth by helping build digital capability across the UK technology workforce. Through freely accessible learning resources, professional certification pathways, and skills focused initiatives, we enable individuals and organisations to develop competencies in workflow automation, low-code development, and responsible use of AI. Our internal talent programmes and wider industry engagement contribute to enhancing digital skills pipelines without committing to specific volumes or outcomes.

Make Britain a Clean Energy Superpower

Pega contributes to environmental sustainability through longstanding corporate commitments to reduce our operational carbon footprint and improve energy efficiency. We follow recognised reporting frameworks, pursue renewable energy usage where feasible, and maintain a cloud-first delivery model that helps minimise reliance on customer hosted infrastructure. These practices support wider UK ambitions for lower carbon public services while avoiding prescriptive or contract specific targets.

Break Down Barriers to Opportunity

Pega promotes inclusive opportunity through global programmes focused on diversity, community engagement, and skills access. Employee Resource Groups, volunteering initiatives, and partnerships with organisations supporting underrepresented groups help foster a fair and supportive environment for employees and the communities we serve. Our approach centres on creating enabling conditions for participation and progression without committing to fixed levels of activity or quantified outcomes.

Build an NHS Fit for the Future

Pega has extensive experience supporting public sector and healthcare organisations to modernise services through workflow automation, case management, and AI-driven decisioning. We share knowledge and good practice through content, collaboration, and sector engagement activities where appropriate. Our technology and expertise help NHS and health adjacent teams improve operational efficiency and patient centered service delivery, aligned to the broader modernisation goals of the health system.

Overview of the G-Cloud Service

Pega offers a number of services offerings as described below:

Implementation Services

Implementation Services engage Pega experts directly configuring and developing applications, taking buyers through the full software delivery lifecycle. These services focus on delivering early value through iterative delivery while building buyer capability and self-sufficiency.

Modern Delivery Methodologies

Blueprint Delivered represents Pega's latest advancement in rapid application delivery, leveraging Pega GenAI Blueprint technology to dramatically accelerate the discovery and solution design phases. This approach enables discovery and solution design to be completed in days rather than months through real-time collaboration between business and IT stakeholders. The methodology encompasses:

- Collaborative Discovery: Joint workshops where teams work together to define and capture the vision, describe prioritised processes including objectives, process steps, key functionality, and expected outcomes (KPIs) in a Blueprint.
- Technical Landscape Mapping: Detailed elaboration of the environment, integrations, data, and technical requirements as part of the Blueprint definition.
- Accelerated Requirements Capture: GenAI-enabled capability that vastly accelerates identification and exploration of use cases, reducing time to value through faster capture and agreement of high-level business requirements.
- Joint Delivery Planning: Creation of a mutually agreed delivery plan that combines delivery expertise with rapidly-evolving GenAI capability.
- Enhanced Business-IT Collaboration: Increased collaboration through visual, interactive Blueprint that both business and technical stakeholders can understand and contribute to.
- Reduced Delivery Costs: Streamlined discovery process eliminates redundant effort and miscommunication that typically inflate project costs.

Blueprint Delivered can be complemented by Pega GenAI Blueprint Innovation Factory (rapid collaborative discovery through joint workshops to define vision and prioritised processes) and Pega GenAI Blueprint to Build (transitioning Blueprint deliverables directly into end-to-end project delivery of an MLP application).

Pega Express continues to provide a proven, light delivery approach using Pega's low-code experience, best practices, and Scrum to deliver meaningful outcomes quickly. The methodology comprises four phases:

- Discover: Focus on outcomes using design thinking techniques to shape, size, and define the project at a high level.

- Prepare: Bring the entire project team together, ensuring alignment on scope, governance, and delivery plan with detailed journey mapping.
- Build: Implement solutions in short two-week sprints using industry-standard Scrum approach, creating working, tested software ready for deployment.
- Adopt: Execute final testing and business change, then deploy software to production.

This approach is built on six core values: solving business problems, designing great experiences, collaborating effectively, accelerating time to value, enabling agility and scale, and leveraging the power of Pega. While Pega Express is evolving, these fundamental principles remain relevant for buyers who may not be in a position to adopt Blueprint immediately.

Pega's Microjourney approach underpins both methodologies, breaking complex buyer journeys into smaller, manageable pieces focusing on users, the actions they take, and the channels they prefer. This reduces risk, enables clear scoping, and supports rapid delivery of Minimum Lovable Products (MLPs) typically within 60-90 days.

Delivery Models

Implementation services can be delivered through flexible engagement models to suit specific buyer needs:

- Pega-Led: Pega leads and provides most of the delivery team. This is often utilised where rapid delivery is a priority, working with new buyers, or driving the implementation of novel Pega capabilities. We work in a blended team with buyer resources to drive skills development through training and co-production to support applications post-production and build subsequent applications.
- Pega-Led, Partner-Powered: Pega leads the implementation with a blended Pega and partner resource model, driving high-quality delivery and knowledge transfer to support future project phases. This approach may be used where the buyer needs vendor expertise to lead the delivery and adoption and has a preferred or incumbent delivery partner.
- Partner-Led (or Client-led): Delivery partner handles end-to-end planning and delivery, with buyer providing internal Pega competency to plan and lead subsequent projects. This approach is typical with more experienced buyers who have created a Competency Centre and have the skills and experience to develop Pega solutions without vendor expert support

Key Services

Application Delivery encompasses project and programme planning with flexible engagement models, implementation guidance with strong focus on delivering early value through iterative delivery, enablement for self-sufficiency to ensure buyers develop in-house knowledge and skills, and quality assurance regardless of delivery model with Pega Consulting resources flexed to meet project needs.

Design and Discovery utilises design thinking techniques to align on buyer outcomes and prioritise high-value capabilities through design sprints involving end users, mapping the 'to-be' experience, sketching ideas for effective and intuitive processes, voting on best ideas and prototyping solutions for real testing, and proving applications with end users before investing in full configuration and testing.

Development and Configuration leverages Pega's three-pillar foundation (Case Types/Microjourneys, Personas & Channels, Data & Interfaces) to organise applications, capturing business needs via model-driven visual tools, designing and configuring applications using low-code studios (App Studio for business developers, Developer Studio for technical requirements), and deploying systems with buyer on-boarding using agile methods.

Testing and Quality Assurance employs comprehensive approaches including unit testing with PegaUnit, scenario testing for

- end-to-end validation,
- business testing within sprints,
- automated testing tools integration,
- Application Quality dashboard monitoring for application health during build,
- Predictive Diagnostic Cloud (PDC) for AI-powered automatic environment health monitoring, and
- Guardrails compliance monitoring to ensure maintainable, upgradeable applications with fewer defects.

Governance and delivery leadership establishes multi-level structures driving collaboration and project success through daily stand-up meetings measuring progress and addressing blockers, weekly project updates with representation from all parties, bi-weekly to monthly project governance reviews, formal governance process from inception through delivery, and proactive risk management and issue resolution.

This comprehensive suite of implementation services ensures buyers can select the delivery approach and engagement model that best fits their organisational maturity, timeline requirements, and capability-building objectives, whether leveraging the latest Blueprint Delivered methodology or the proven Pega Express approach.

These services are typically provided on a time and materials basis in line with the rate card provided. On a case by case basis, and subject to mutual agreement, Pega will also provide services on a fixed price basis.

Expert Advisory Services

Expert Advisory Services are specialised consultancy offerings provided on either a time and materials basis or as fixed-price engagements (subject to agreed scope). These services include:

Design and Architecture Services

- **Design Review:** Provides unbiased assessment of application design, ensuring it leverages Pega Platform's model-driven capabilities with thorough evaluation against industry-recognised design principles and Pega's "Ten Guardrails for Success."
- **Performance Health Check:** Delivers diagnostic service with operational performance inspection, analysis, and remediation recommendations to improve system performance before production deployment.
- **Modernisation Assessment:** Reviews modernisation objectives and landscape, running sample upgrades to determine options and recommending strategy, scope, and implementation steps.
- **Experience Design Review:** Evaluates and improves user experience aspects of applications using human-centered design techniques to build empathy and provide innovative design solutions.
- **User Interface Review:** Evaluates application UI architecture, maintainability, and scalability, focusing on maximising reuse and ensuring compliance with industry best practices.
- **Architecture and Infrastructure Modernisation:** Workshop-based service helping buyers map their journey from current to future state for cloud architecture, multi-data centre setup, and high availability solutions.

Accelerators and Innovation

- **Centre of Excellence Accelerator:** Capability-building service focused on transferring expertise to buyer teams, ensuring successful deployment while promoting standard methodologies, tools, and education.
- **DevOps Accelerator:** Helps determine optimal CI/CD practices, aligning various practices to automate the deployment process using either Pega Deployment Manager or Open DevOps methodology.
- **Citizen Development Accelerator:** Best practice-based approach to establishing a citizen development ecosystem, enabling business users to build applications while minimising IT burden.

- Pega Express Health Check: Lightweight assessment of application delivery approach using tools to review adoption maturity of Pega Express best practices, resulting in an improvement plan.
- Low Code Enterprise Development Workshop: Typically 3-day workshop providing hands-on experience with Pega's low-code platform to set up enterprise reuse models for faster application delivery.
- Lighthouse: Innovative approach enabling cross-functional teams to drive innovation and early adoption of new technologies, especially those embedding Generative AI.
- Pega GenAI Blueprint Innovation Factory: Rapid collaborative discovery and project initiation through joint workshops to define vision, prioritised processes, and expected outcomes in a Pega Blueprint.
- Pega GenAI Blueprint to Build: Complementary service to Blueprint Innovation Factory that transitions deliverables directly into an end-to-end project to deliver an MLP application into production.
- Pega Transformation Accelerator is a comprehensive approach to digital transformation that uses design thinking techniques to define your current challenges, align on a future-state vision, engage your team in a repeatable framework for innovation, and develop a roadmap to achieve business value

User Experience and Interface

- User Experience and User Interface Adoption: Range of cloud support services optimising user experience, from theme selection to establishing UI design patterns and ensuring accessibility compliance.

Prescriptive Delivery Accelerators

- Email Bot: Automates email responses to buyer inquiries, providing self-service options and automated casework creation with production capability delivered within 8 weeks.
- Voice AI: Provides real-time intelligent guidance for calls, including script compliance verification, contextual knowledge surfacing, and form auto-completion with production solution within 5 weeks.
- Digital Messaging: Enables real-time intelligent guidance on citizen's preferred channel, reducing response times and automating simple requests with initial MLP delivered within 6 weeks.
- Process AI and Mining: Rapid 6-week delivery approach for process analysis and improvement recommendations using Pega Process Mining.

- Pega GenAI Knowledge Buddy: GenAI-powered solution connecting users with needed knowledge instantly, providing contextual self-service answers with initial deployment completed in 4 weeks.

All of the above Expert Advisory Services can be provided on a time and materials basis in line with the rate card provided. On a case by case basis, and subject to mutual agreement, Pega will also provide services on a fixed price basis.

Subscription Advisory Services

Subscription Advisory Services are strategic offerings designed to provide tailored guidance, available on annual subscription basis (minimum 12-month contract):

Key Roles

- Programme Architect: Acts as design authority driving value at scale by ensuring scalable architecture with reuse and leveraging latest Pega technology. They develop enterprise reuse strategy, establish best practices, and create roadmaps leveraging Pega capabilities.
- Technical Account Manager: Dedicated professional working across buyer's Pega landscape ensuring applications are performant and resilient, enabling application growth, improving developer productivity, and eliminating inefficiencies.

Service Benefits

- Prioritize automation projects based on business strategy and Pega experience
- Accelerate design and delivery processes to shrink backlogs
- Adopt best practices for Pega project management at all levels
- Enhance developer skills through coaching and custom enablement
- Reduce development and training time for cost savings
- Benchmark programs against other large-scale enterprises

Associated Services

Professional Services for implementation, advisory and expert services, such as Performance Health-Checks, are included in this Lot (Lot 3 Cloud Support). Please refer to our rate card for details of pricing related to Professional Services / Consulting. These services are designed to work in harmony with the product purchase, maintenance, and user support covered under Lot 2b (Software as a Service), ensuring a seamless end-to-end experience from technology acquisition through to successful adoption and ongoing optimisation.

2. DATA PROTECTION

Information Assurance

Pega maintains a comprehensive security and compliance programme, supported by globally recognised certifications and standards:

- Security Accreditations & Certifications
 - ISO/IEC 27001 (Information Security Management)
 - ISO/IEC 27017 & ISO/IEC 27018 (Cloud Security & Privacy)
 - SOC 1 & SOC 2 Type II
 - PCI DSS (Payment Card Industry Data Security Standard)
 - CSA STAR Level 2
 - Cyber Essentials & Cyber Essentials Plus
 - HITRUST (Healthcare data protection)
 - FedRAMP (for U.S. federal compliance)
 - ISO 9001

The complete list with full details is available on the Pega Trust Center. All certification details, including product coverage, exclusions, and supporting documentation, can be accessed through the Pega Trust Center which is available online or on request.

Processes & Facilities

- AES-256 encryption for data at rest; TLS 1.2/1.3 for data in transit
- Role-based access control and multi-factor authentication
- Continuous monitoring, vulnerability management, and annual penetration testing
- Secure development lifecycle incorporating OWASP best practices

Policies & Standards

- Compliance with GDPR, UK Data Protection Act, and other regional privacy laws
- Alignment with NIST and ISO frameworks for risk management and incident response

Data Back-Up and Restoration

Data Back-up and Restoration is an intrinsic part of the Pega Software as a Service under lot 2b.

Backup Frequency: Daily backups of all environments, with multiple restore points retained.

Control: Backups are managed by Pega Cloud; buyers can request restoration through support.

Testing & Review: Backup and restoration processes are regularly tested and updated as part of Pega's business continuity and disaster recovery programme.

Customisation: Where buyer specific requirements define a need for more custom arrangements, these may be discussed with the buyer prior to an order being placed and documented / agreed in an Order Form.

Business continuity statement/plan

Pega Cloud is a fully virtualised managed PaaS built on AWS IaaS, which provides the underlying infrastructure and physical security. AWS operates globally across Regions and Availability Zones (AZs), ensuring high availability and resilience through geographically distributed, redundant environments. Pega Cloud leverages this architecture to deliver real-time failover, load balancing, and synchronous database replication across zones, supported by hot standby databases for production systems.

To maintain business continuity, Pega Cloud implements robust disaster recovery (DR) and backup strategies. These include continuous backups (up to 30 days), automated failover for zone-level failures, and optional Enhanced Disaster Recovery for region-wide events. Recovery objectives are stringent, with RTOs as low as 4 minutes for zone failures and 150 minutes for catastrophic regional incidents, and RPOs typically under one minute for synchronous replication. Testing of DR and business continuity plans is conducted annually, with senior management oversight.

Global support operations provide 24x7x365 monitoring and incident response using a follow-the-sun model. Buyers are notified of major incidents via the Pega Cloud Status portal and email, with regular updates during recovery. The architecture ensures durability, rapid restoration, and resilience against physical disasters, while governance processes define roles, responsibilities, and validation procedures. A detailed plan can be provided on request.

In tandem with our business continuity services related to provision of Pega Software as a Service (Lot 2b), our outline plan to maintain operations in a service continuity event emphasises a remote-first model with secure, managed devices, MFA/VPN, standardised cloud tools and regular backups; clear invocation triggers. Continuity strategies cover loss of site (pivot to remote/alternate locations), staff unavailability (activate backups and re-prioritise), tooling/SaaS outage (switch to pre-identified alternates and manual workarounds), cyber incident (containment, isolation, notification, clean recovery), supplier/platform disruption (focus on unaffected workstreams and coordinate with platform owners), and public health/transport events (home-working). We align our continuity with platform practices documented at the

Pega Trust Center for Pega and Pega Cloud. A more detailed plan can be provided to the buyer on request.

Privacy by Design

Pega embeds privacy principles throughout its software development lifecycle:

- **GDPR Compliance:** Privacy impact assessments conducted for new features; data minimisation and purpose limitation enforced.
- **Proactive Measures:** Encryption, pseudonymisation, and strict access controls implemented from design stage.
- **User Rights:** Built-in capabilities for data subject rights (access, rectification, erasure).
- **Continuous Review:** Regular audits and updates to maintain compliance with evolving regulations.

3. USING THE SERVICE

Ordering and Invoicing

Our services are typically offered to buyers who have already procured Pega Software or are a new buyer adopting Pega software for the first time. To discuss your requirements in more detail and place an order please contact your account team, or Simon Haydn-Lee.

Specific details of the services required and mutually agreed will be documented in the form of a Statement of Work as part of the Order Form. Pegasystems (Pega) offers a variety of different delivery and contractual models to support the implementation and configuration of our software. We will agree specific terms and conditions within our Statements of Work (SoW) which will be mutually agreed with the buyer. For reference we have included 6 SoW templates (document entitled “Pega G-Cloud 15 Lot 3 Software Support Service Additional Terms and Conditions v0.3” to identify terms and conditions which would form the starting point for construction of a Work Order for any specific engagement.

- Time and Materials Full Implementation
- Time and Materials Advisory Services
- Time and Materials Cloud Migration
- Time and Materials Co-production
- Fixed Price
- Subscription Advisory Services

Fees are typically invoiced monthly in arrears (with the exception of Fixed Price (which would typically be milestone-based); and Subscription Advisory Services (which are payable annually in advance)). Payment terms are 30 days net of receipt of invoice.

Availability of Trial Service

Pega consulting do not typically offer a trial service. All services are provided in line with our published rate card and the published terms and conditions including the ability to terminate for convenience with 30 days' notice.

On-Boarding, Off-Boarding, Service Migration, Scope etc.

Onboarding

Pega collaborates with buyers / clients to ensure a smooth transition and onboarding process, incorporating (as needed):

- Collaboration to ensure joint agreement on the order form and associated Statement of Work
- Clarification and agreement on buyer responsibilities including resource commitment
- Security clearances (BPSS / SC) in advance if needed
- Engagement kick-off meeting with project sponsor, delivery leads and key stakeholders
- Resource planning
- Assign team members including Project Delivery Leader as primary point of contact
- Establish multi-level governance include escalation paths
- Buyer training / enablement
- Custom onboarding arrangements as may be agreed
- In some instances, for certain buyers a Client Success Manager may be appointed at Pega's sole discretion

Offboarding

- During the course of the engagement, Pega and the buyer / client will work together to agree any appropriate offboarding processes
- Termination for convenience is typically permitted with 30 days' notice
- Arrangements for access to Pega Software as a Service remain unaffected by offboarding of Pega consulting under lot 3
- Coproduction with buyer staff and / or delivery partners avoids the need for extensive knowledge transfer during offboarding
- Offboarding would typically include handover and walk-through of documentation, system access

Training

Pega offers various training approaches to buyers. These options are designed to accommodate different learning preferences, organisational needs, and implementation scenarios.

Pega Academy

Pega Academy serves as our primary training platform, offering a comprehensive range of courses designed to help users effectively utilise Pega products. The Academy provides structured learning paths that include hands-on exercises and assessments, ensuring learners can apply their knowledge in real-world scenarios. The platform also features sample applications and additional resources to enhance the learning experience, making it accessible for users at various skill levels. Pega also offers a Pega Academy Live – Flex and Mentored training combining self-paced learning with mentor guidance, in addition to Public Instructor-Led training courses.

Socrates

Socrates is an interactive learning experience available within Pega Academy that takes a personalised approach to education. This innovative tool engages learners through dialogue, addressing their specific learning needs via a series of modules and challenges. Socrates helps users of all experience levels gain deeper understanding of application development concepts within the Pega Platform by adapting to individual learning requirements.

Gen AI Technology

Pega incorporates generative AI tools, particularly Pega GenAI Autopilot, to enhance the learning experience and accelerate skill development for developers. Autopilot provides detailed information, instructions, and context-specific suggestions for building and editing applications, making it easier for users to navigate the development process. This technology improves productivity by offering real-time guidance and recommendations while ensuring adherence to best practices throughout the learning journey.

Bespoke Classroom Training

For organisations seeking tailored learning experiences, Pega offers customised classroom training sessions that can be adapted to meet specific organisational needs. These sessions provide in-depth knowledge and hands-on experience with Pega products, allowing participants to engage directly with experienced instructors and ask questions in real-time. The classroom format facilitates collaborative learning and immediate feedback.

Customised Consultancy Delivered Courses

In addition to classroom training, Pega provides consultancy services that deliver customised training courses, and hands-on knowledge transfer, designed to address unique organisational challenges. These courses can be tailored to focus on specific

Pega functionalities or business processes, ensuring the training is both relevant and immediately applicable to your buyers' specific implementation contexts.

Additional Training Delivery Methods

Pega also utilises various complementary methods for training delivery, including online webinars, workshops, and self-paced e-learning modules. These options provide flexibility for learners to engage with material at their own pace and convenience, accommodating different learning styles, schedules, and geographical locations.

All of these training approaches work together to empower Pega buyers by providing them with the knowledge and skills necessary to effectively utilise Pega solutions, ultimately driving better business outcomes and maximising return on their Pega investment.

Implementation Plan

A detailed implementation plan can be provided to the buyer on request. Every buyer engagement has unique characteristics however each plan will include the following steps:

- Confirmation and alignment of detailed project scope and outcomes
- Continuous elaboration of business requirements
- Application configuration through 2-week sprints (unless otherwise agreed with the buyer)
- Continuous application testing
- Deployment and solution adoption
- Further roadmap for enhancement and iteration

These steps will be realised differently depending on the nature of the services agreed for which certain steps identified above would be adapted to ensure relevance with the services agreed. Certain services follow a prescriptive delivery approach. Subscription advisory services are engaged via a consulting method and associated tools (Compass™) and do not require a separate implementation plan.

Service Management

Service Management is provided as part of the Pega Software as a Service under Lot 2b (Software as a Service). Pega Cloud provides comprehensive service management based on industry best practices:

- Service constraints include scheduled maintenance windows (typically weekends) with advance notification
- Adherence to IT Service Management procedures aligned with industry standards
- Comprehensive monitoring through replicated Network Operations Centers (NOC) with 24x7x365 coverage

- Three-tiered technical support structure with defined escalation paths
- Regular service performance reviews and proactive capacity management

Service Constraints

Service Management is provided as part of the Pega Software as a Service under Lot 2b. Service constraints for Pega Cloud include:

- Scheduled maintenance windows typically performed over weekends with advance notification
- Buyer-specific customisations limited to application layer configurations
- Service changes subject to Change Advisory Board (CAB) approval
- Feature deprecation scheduled with advance notice and migration paths
- API versioning and backward compatibility managed according to published policy

Service Levels

Service Management is provided as part of the Pega Software as a Service under Lot 2b. Pega Cloud production environments are provided with a 99.95% availability SLA. Specific service levels can be discussed and agreed upon prior to order placement, covering:

- Application performance metrics
- Support response times based on severity levels
- Environment availability commitments
- Incident resolution targets

4. PROVISION OF THE SERVICE

Customer Responsibilities

Buyer responsibilities are agreed on a case-by-case basis, dependent on factors such as the nature of the engagement, the agreed delivery model and specific buyer needs as may be agreed.

Typical buyer responsibilities include:

- Ensuring compliance with all applicable international and local laws and regulations.
- If required, provision of building access and access to a working environment including internet access, desk / meeting room facilities for Services performed on buyer's site.
- Access to applicable system environments including the licensed Pega Platform software and Buyer Application(s), development and test environments, databases and web applications.
- Provision of skilled and competent resources including but not limited to:
 - Subject Matter Experts
 - Project / Programme manager
 - Co-production resources
 - Enterprise Architect
 - Product Owner
 - Testing team
 - Other specialist resources as may be required (eg user research, security testing / ethical hacking).
- Management of integrated Project plan and hosting timely meetings to mutually discuss current status against the plan with all vendors including Pega (under the banner of overall programme governance).
- Establishing the appropriate collaborative Project and programme governance structure including all internal buyer governance and project gates
- User research
- Compliance with, and management of GDS Service Assessment when required.
- Training of buyer team if applicable
- End-user training
- Acceptance of deliverables

Technical Requirements and Client-Side Requirements

Buyer responsibilities are agreed on a case by case basis, dependent on factors such as the nature of the engagement, the agreed delivery model and specific buyer needs as may be agreed.

Typical buyer responsibilities include:

- Agreement for provision of Pega Software as a Service and providing access to its licensed Pega Cloud environments
- Procurement, installation and provisioning of any hardware and third party software required for the Project delivery, also ensuring such environments are operational and available.
- Security of, and access to, the Pega Platform and Buyer Application(s).
- Data migration strategy and execution
- Provision of all required interfaces / integrations, APIs and data as may be required to deliver the agreed services.

Outcomes/Deliverables

Deliverables and outcomes from Pega's Cloud Support Services will vary in line with the nature of the agreed Order Form. Examples include:

- Configured application or system deployed for production use
- Definition of a product roadmap
- Assessment of buyer context and recommendations including solution design, centre of excellence, user experience, user interface design, system performance, devops strategy
- Modernisation strategy
- Upgrade and / or cloud migration strategy and plan
- Adoption strategy
- Training materials
- Best practice recommendations

After-sales Account Management

Buyers are typically assigned dedicated resources throughout the engagement:

Account Executive, Solutions Consultant and Consulting Solutions Executive:

Throughout pre-sales these resources will lead the engagement with the buyer to define the services required under lot 3 and lot 2b if applicable. They will then ensure a well-structured and efficient transition into delivery and support with ongoing account management as part of the buyer's account team.

Client Success Manager (CSM): Serves as the primary trusted advisor, governing the buyer relationship post-sale and measuring success at a strategic level. The CSM drives buyer adoption, reinforces best practices, and continuously measures value. This role

continues beyond initial implementation to support long-term success for certain accounts.

Project Delivery Leader (PDL): Manages project implementation, focuses on rapid delivery, drives best practices, and executes project governance during the implementation phase.

Service Assurance Advisor (SAA): Manages technical escalations, provides upgrade support, and oversees Pega Cloud technical matters.

Client Success Architect (CSA): Provides deeper technical support, development guidance, and product collaboration (where assigned based on account requirements).

Client Success Plans and Scorecards

Pega develops Client Success Plans that establish mutual success criteria, business objectives, and value realisation metrics. Client Success Scorecards track progress against adoption goals, value creation targets, and delivery quality measures. Multi-level governance (executive and project-level) and multi-party collaboration (Buyer, Pega, partner) are established based on KPIs.

Ongoing Account Management

Account management continues post-implementation through regular business reviews, health and adoption checks, usage maturity assessments, and collaborative benefit measurement. The Pega Account Team typically made up of an Account Executive, Consulting Solutions Executive and CSM maintain the relationship, ensuring buyers stay current with platform updates and realise continued value from their Pega investment.

There is no fixed time limit on Pega Account Team support; the relationship continues as long as the buyer maintains their Pega services, with support levels tailored to the buyer's tier and requirements.

This ongoing Account Management will include all appropriate governance is in place to support a successful outcome for the buyer from both the delivered services in lot 3 and associated lot 2b contract. This includes a senior executive engagement between the parties as part of a quarterly business review to align future strategic initiatives for both Pega and the buyer.

Termination Process

The buyer may typically terminate services with 30 days' notice. In such event, Pega will work with the buyer to agree any specific activities required to ensure an orderly termination and handover (offboarding) including, for example, the orderly completion of relevant work in progress and collaboration with the buyer to conduct knowledge transfer including provision of documentation where appropriate. All such services are provided on a chargeable basis in line with the pricing structure agreed in the Order Form and Statement of Work (and in line with the published rate card).

5. OUR EXPERIENCE

Case Studies

National Settlement Application Programme: Pega's **low-code development platform** enabled mobilisation of a functioning demonstrator within one week, with a production platform delivered in under three months by partner teams. The service processed applications at national scale rapidly and reliably, demonstrating how **agile delivery capabilities and configurable workflows** can meet urgent policy needs with speed and assurance.

Investigative Case Management Platform: Built using Pega and aligned to GDS best practice, this platform demonstrates **Investigative Case Management (ICM)** capabilities providing joined-up investigative case handling to tackle fraud and error. The platform's **end-to-end case lifecycle management and automated audit trails** focus resources where they matter most, strengthen controls, and protect public funds while improving services for people in genuine need.

Military Recruitment Transformation Platform: Pega enables a modern recruitment experience for armed forces candidates through **case management and process automation capabilities**. The digital recruitment system was built within nine months, putting **process ownership and change capability** in the department's hands. Most recently, Pega has been selected as part of the consortium to deliver a new generation recruitment service, supporting rapid acquisition of critical skills through **digital onboarding and workflow automation**.

Clients



Contact Details

New clients can contact:

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About Pega

Pega delivers innovative software that crushes business complexity. From maximizing customer lifetime value to streamlining service to boosting efficiency, we help the world's leading brands solve problems fast and transform for tomorrow. Pega clients make better decisions and get work done with real-time AI and intelligent automation. And, since 1983, we've built our scalable architecture and low-code platform to stay ahead of rapid change. Our solutions save people time, so our clients' employees and customers can get back to what matters most. For more information, visit us at:

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