Before starting your Pega project, ensure that all prerequisites and “must have” items are in place. These fall into three categories: people, process, and technology.

**People**

* Identify all stakeholders and create a matrix to show the reporting structure.
* Identify an internal empowered Product Owner and arrange [training](https://academy.pega.com/library/na/introduction-to-product-owner-role-in-scrum) as necessary. This will ensure that the Backlog is appropriately managed from the start.
* Identify subject matter experts to support the Product Owner.
* Identify an on-shore / off-shore / near-shore resource model as applicable. Agree how this will be managed.
* Identify a Scrum Master, Test Manager and Business Change Manager based on the resource model.
* Resource the project team with appropriately skilled people. This may include hiring. Use [Find a Community Member](https://my.pega.com/mypegaprd/PRAuth/DO7joI3soeSoOCkz5pMNmA%5B%5B%2A/%21STANDARD) to verify qualifications.
* Enroll business and technical resources in appropriate [Pega Academy](https://academy.pega.com) courses and certifications to ensure readiness.
* Ensure it is clear who will be performing coaching/mentoring functions.
* Secure any necessary work visas / security clearances.
* Ensure that equipment use, work spaces, physical access restrictions, remote access, travel, and other policies that impact resource selection have been communicated and addressed.

**Process**

* Document the project vision, high-level timeline, and agree a detailed schedule for the rest of the Prepare phase.
* Review the [Case Type Backlog](https://community.pega.com/knowledgebase/articles/pega-project-delivery-lifecycle/define-minimum-loveable-product) and Day 1 Live Plan to identify and size the first Minimum Lovable Product (MLP) release. This will ensure all user journeys, personas, channels and interfaces have been defined.
* Collect samples of existing business processes (screenshots, flows, emails, etc.), outputs of work, and any planned to-be processes to provide context for what is being replaced and the data involved.
* Schedule Vision Alignment workshop with all resources (internal, partner, Pega) to start the project.
* Start establishing effective governance by scheduling the first round of governance meetings and securing buy‑in for active participation. This will include agreeing the cadence of project reporting, scope governance and dependency meetings (e.g. weekly), project governance (e.g. fortnightly), and executive governance (e.g. monthly).
* Define and commit to a process for handling change control.
* Create an initial program / project communication plan so that all stakeholders can remain regularly informed of progress and can appropriately prepare for go live.
* Complete a [Delivery Excellence Workshop](https://www.pega.com/insights/resources/pega-delivery-excellence-workshop) with the internal team to understand the [Pega Express](https://community.pega.com/knowledgebase/project/pega-express) methodology and how it will be applied. This will increase initial design and build velocity.

**Technology**

* Confirm hosting strategy (Pega Cloud, private cloud, on-premise) and required environments. If on-premise, determine hardware/software purchase lead time and reflect in the project timeline.
* Identify data migration needs and any data cleansing needs.
* Identify data sources, determine data services, and obtain APIs for existing and new interfaces.
* Obtain provisional dates for any interface delivery and their owners.
* Agree an initial test approach, typically this will be to use iterative journey centric testing.
* Create a technical dependency schedule that includes interfaces, infrastructure, migration. This will determine which dependencies require a long lead time and should be prioritized.
* Confirm document sharing and project management tools (e.g. Pega Agile Studio). Identify who will procure and ‘own’ the tools. If you are going to use Agile Studio, make sure you specifically request for this to be provisioned by the Pega team
* Confirm use of Continuous Integration / Continuous Delivery ([CI/CD](https://community.pega.com/knowledgebase/capabilities/devops)) tools to automate steps in the software delivery process. If you are going to use the Pega Deployment Manager, make sure you specifically request for this to be provisioned by the Pega team