

Top Five Ways to Ensure that Your CoE is an Ongoing Success

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This edition published September 2014

Table of Contents

Abstract	2
Introduction	3
What is a CoE and Why is it Established?	3
Are Any of the Five A's Missing in Your CoE?	4
Agility	5
Administration	5
CoE Manager	5
Product Administrators	6
Accountability	6
Architecture	6
Case Study	7
Automation	7
Conclusion	8

Abstract

The purpose of this white paper is to provide individuals and organizations with pragmatic advice and recommendations on how to develop and maintain a Center of Excellence (CoE) that aligns with the Information Management goals of the organization.

Many CoEs and Data Governance initiatives start with the best of intentions, then falter and ultimately fail because of a “cult of personality”—that is, a charismatic leader who keeps the program alive but doesn’t prepare the organization effectively to continue in his or her absence. Most of these initiatives face the same set of issues that prevents them from remaining a permanent force in the organization. This paper explores some of the common issues for CoEs that struggled to maintain continued relevance. The insights show that the execution of a CoE is an iterative process, which has to be periodically refined and fine-tuned to organizational needs. For a long-term, sustainable CoE, five critical success factors—**Agility, Administration, Accountability, Architecture and Automation** (the five A’s)—are essential.

Introduction

In the past few years, Informatica has been involved in formalizing and interacting with CoEs for many different organizations. All of them were well established and executed effectively at first, but at a later stage many of them failed to sustain the growing momentum in their organizations. In most cases, the CoE had no future functional expansion and it survived only for the time the key sponsor remained in place. Eventually, the CoEs faced a string of complaints and criticisms from users and became viewed as a “faded glory” in the organization.

The issues that were evident across these CoEs were similar and were not major roadblocks. Fixing these simple issues could have solved most of the emerging problems in those CoEs and enabled them to grow and provide increasingly greater value to the enterprise.

This paper is not intended to discuss at length organizational IT budget cuts, operating models for a CoE, or the operational cost of a CoE. Rather, this paper will address a few simple changes to fine-tune existing CoEs for ongoing success. It does not target any one particular type of organization or CoE.

What is a CoE and Why is it Established?

To obtain the best answers to this question, search no further than the book *Integration Competency Center: An Implementation Methodology* by John Schmidt and David Lyle.

The Integration Center of Excellence is an enterprise-shared service for performing systematic application integration. It is also referred to as Integration competency center (ICC) or Integration center of expertise (CoE, ICE, or ICoE). Although the names may vary, the goals of the CoE are the same:

- **Reduce integration costs** so that a larger percentage of the IT budget can be focused on business value-added systems. The ICC does this by enforcing standards, using highly tuned processes, and driving software and data reuse. The result is less development effort, reduced need for extensive testing, and lower support costs.
- **Create an adaptive enterprise** and allow the business to rapidly change as the market changes. The ICC does this by allowing individual applications to be loosely coupled so that they can change independently yet still be tightly integrated to enable efficient business processes.

ICCs enable companies to integrate data and resources in a coherent, scalable, and cost-effective way to deliver an enduring competitive advantage. When done well, integration benefits the whole company.

Here are the top 10 reasons to establish and execute a successful CoE in the big data era:

- Support Data Governance and other Data Analytics initiatives
- Facilitate regulatory compliance and data privacy needs
- Support Master Data Management
- Adapt and accommodate new trends such as Big Data and social media
- Enable disaster recovery
- Reduce complexity in development process and have time to market strategies
- Accelerate change
- Boost team productivity and retain knowledge
- Eliminate surprises
- Save money and make money through data management initiatives for the organization

In sum, a CoE should increase the organization's revenue by leveraging data as a valuable asset.

In most organizations, a CoE is established with expert advice and a team of professionals. Can launching a CoE alone guarantee success for an organization? No. Establishing a CoE is different from creating a new process model or initiating a project. Buying an enterprise license of a product, defining a set of processes, documenting standards, and having a team to install and maintain the products are not sufficient for a successful CoE. A CoE should aim to add substantial value across business units, and it should add true value to the IT organization and help fuel business growth. A successful CoE depends on top-down stakeholder support to align its activities with strategic business initiatives and bottom-up support from program/project managers and architects to implement policies, procedures, and best practices.

Are Any of the Five A's Missing in Your CoE?

At a detailed implementation level, there are many potential impediments to a correctly maintained CoE. The common issues across CoEs are summarized in five categories: the five A's.

- Agility
- Administration
- Accountability
- Architecture
- Automation

The next sections will expand on each of the categories.

Agility

“The only constant is change, continuing change, inevitable change that is the dominant factor in society today. No sensible decision can be made any longer without taking into account not only the world as it is, but the world as it will be.”

This quote by Isaac Asimov very well suits our current IT environment. In the global trend, any business would prefer to have its IT solution available in market as early as possible. Most data integration projects are executed with a special tag: “critical”. Due to the increased pressure from business, IT project execution is slowly leaning toward lightweight development. So in many organizations, Agile and Scrum approaches are becoming popular for data integration projects. These methodologies focus more on working software than on comprehensive documentation.

With Agile/Scrum, IT projects are executed with only the required documentation and follow a fast-phased development approach. Hence these projects may not appear in regular release management schedules. For on-boarding/supporting these projects, CoEs should adopt Agile and lean integration techniques. It is the responsibility of the CoE to access, identify, and remove waste in the end-to-end processes. The inability to be agile and ready to adapt to changes is a potential issue for CoEs.

Here is a simple example: A well-established CoE had rigid processes (approval and documentation) and deployment schedules. A data integration project was about to kick-off using an Agile approach, but the CoE was not able to accommodate it. The reason? On-boarding a new resource for the development process took around two weeks, which was nearly one quarter of the total project time. After several rounds of discussion, the project team ended up buying their own software to accomplish the project time lines. This example shows how a CoE failed to achieve its purpose of supporting business and project needs. To adapt to these changes, CoEs should periodically review established processes and adjust them to suit the IT needs.

Administration

This is a trickier category. Involving more than the product administrators, this category covers all the people issues and organizational changes that are caused by the CoE manager and product administrators who work in the CoE.

CoE Manager

A technical employee who works only within IT or an individual focused solely on business can never lead a successful CoE. The leadership of the CoE should reside with someone who has the respect of IT, respect within business units, and is trusted by IT Governance and the IT Steering Committee to carry the vision across business units. This is where many CoEs falter: having the wrong people for the job.

A CoE manager needs to understand the business value provided by the tools and products that the CoE owns and the services it provides. Responsible for securing work for the CoE, a typical CoE manager should be able to present the business case of each product or service offered by the CoE and convince business stakeholders and project teams to utilize the CoE effectively. The CoE manager should have a road map for hardware and software needs based on emerging requirements and should work closely with product administrators and architects for any necessary technical assistance.

Product Administrators

Product Administrators are the face of the CoE; they represent the CoE to business groups and interact with the customers directly. Product administrators within a CoE must have sound technical knowledge of the products and services they provide. They should have clear-cut understanding of the product functionality and should know how to get answers to new challenges. They are also responsible for implementing processes and procedures for the BI tools, ETL tools, and data quality tools. Working closely with data center specialists, such as database administrators, the product administrators ensure that the BI environment delivers adequate scalability and performance. Ultimately, having a strong product administrator group is the responsibility of the CoE manager.

Accountability

In most CoEs, accountability for the end-to-end process is missing. First, everyone who works for the CoE must have a clear understanding of his or her roles and responsibilities. Each role should be clearly distinct from the others; if the roles overlap, the potential result could be duplicate work or missed deliverables. Although the management objective is team stability, over time it is inevitable that some members of the team will change. A clear definition of roles and responsibilities allows for quick identification and on-boarding of new members to the CoE.

More importantly, in integration roles, accountability for the end-to-end process involves taking some ownership for how everyone in the value-chain works together to accomplish the final operational solution. The best CoE leaders take accountability for more than what they are directly responsible for. When another internal team that the CoE depends on (such as DBA, security, infrastructure engineers, or testing staff) fails to meet its service levels, a successful CoE leader does not say, "That's not my job". Rather, the CoE leader admits to the business sponsor that a failure happened and collaborates with the dependent teams to make up for lost time and establish procedures to prevent future re-occurrences.

Architecture

Architecture is the backbone of the CoE. Only appropriate architecture capabilities can drive the CoE in the right technical direction. Unfortunately, due to the cost or unavailability of the right people, many CoEs attempt to operate without a skilled Architect or an Architecture manager.

A CoE should have an Architecture Manager as its lead technical advisor who serves as the subject matter expert (SME) for technical decisions and directions. The architect should also be well versed in software products within the scope of the CoE, hardware infrastructure, development activities, and administration and methodology practices. He or she should closely work with the CoE manager in identifying new opportunities for the CoE and act as a technical advisor for all new projects.

Architects should also interact closely with product support so they can plan for software product upgrades and hardware sizing for future CoE needs. Because this role is crucial in running a successful CoE, it requires a seasoned professional, either an internal employee or a hired consultant. For instance, an Integration CoE based on the Informatica platform can use Informatica Professional Services Technical Architecture Managers, who are trained specifically to perform this crucial role.

Case Study

An architect played a critical role in establishing a CoE; all the processes were defined at the right time and refined periodically and the CoE was heading in the right technical direction. As part of cost-cutting efforts, the CoE manager replaced the architect with another administrator. When the new administrator was unable to fit in the role of the architect, it led to the end of growth for that CoE.

Automation

It is not required to automate the processes while establishing a CoE. But as the CoE grows, it is critical for the Administration and Architect group to identify repetitive work and automate it. This will help the CoE to perform accelerated development, reduce regular maintenance, and potentially result in significant cost savings as well.

Some of the administration work may seem simple to perform during the initial phases of CoE, but bear in mind that the volume of work may drastically increase. Efforts such as code review, code migration, resource monitoring, and product status monitoring can be automated. In addition, general data integration validations and data operations can be created as reusable operations for all projects. A CoE can also leverage public forums such as the Informatica Marketplace to identify and secure automation tools.

Case study: The statistics for this case study were collected from a CoE administration team that had four environments (Dev, Test, QA and Prod). On average, the administration team performed 10 migrations per day. They spent up to 2 hours on migration and post-migration activities. Effectively that CoE was spending approximately 5,000 hours per year just in migration activity. Had the administration team developed a code deployment tool, it would have resulted in huge cost savings, higher quality deployments, and more rapid delivery—all of which would have helped it add value to the business.

Conclusion

With an emphasis on real-world experience, the author has shared his functional, technical and management consulting experience to provide organizations with some pragmatic advice and recommendations on how to develop a CoE that aligns with an organization's information management goals. While there are common elements between all CoEs, there is not a "one size fits all" approach, so the common issues are generalized as the five A's: Agility, Administration, Accountability, Architecture and Automation.

Executing the CoE with zero or minimal failures is not sufficient for its success. Customers of the CoE must be successful in executing their project using CoE services. Only then is a CoE truly successful.

About Informatica

Informatica Corporation (Nasdaq:INFA) is the world's number one independent provider of data integration software. Organizations around the world rely on Informatica to realize their information potential and drive top business imperatives. Informatica Vibe, the industry's first and only embeddable virtual data machine (VDM), powers the unique "Map Once. Deploy Anywhere." capabilities of the Informatica Platform. Worldwide, over 5,000 enterprises depend on Informatica to fully leverage their information assets from devices to mobile to social to big data residing on-premise, in the Cloud and across social networks.



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