Reimagine Transformational Change

WS 307: Case Study: Enterprise Data Platform

Dec. 13, 2023
Case Study: Enterprise Data Platform
Socratic Questions: Enterprise Data Platform

1. Business Requirements <-> Lines of Business Leadership

2. Line of Sight to Outcomes - Roadmap, Milestones and Backlog

3. Execution Trainlines: 30,60,90 Day Delivery Trainlines
Re-imagine Transformational Change
Quick Review of Past three Webinars

**Business Requirements**
- Impacted Stakeholders
- Engage, Lived Experiences
- Build Momentum
- Define opportunity and problem to solve
  ACC/RESP: People Leaders

**Line of Sight to Outcomes**
- Opportunity & Innovation
- Roadmap (TOGAF®)
- Work Packages
- Backlog of Requirements
- Overall program Timeline/Cost
  ACC/RESP: Arch & PMO

**Delivery Trainlines**
- Selected Requirements from the Backlog
- Firm Plan
- Repeat Change Delivery
  ACC/RESP: PMO & Team

**Opportunity**
- Project Charter
- Requirements from Selected People
- Fix Scope
- RES/ACCT: PMO

**Outcomes**
- Start Execution
- OCM
- RES/ACCT: PMO

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**Key Phases**

**Opportunity**
- Re-imagined
  - ACC/RESP: People Leaders

**Business Requirements**
- ACC/RESP: Arch & PMO

**Line of Sight to Outcomes**
- ACC/RESP: PMO & Team

**Delivery Trainlines**
- ACC/RESP: People Leaders

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**Re-imagined**

**Opportunity**

**Current**

**Outcomes**

*As Exception - Change Request*
Quick Review of Past three Webinars

Re-imagine Transformational Change

Benefits

- The current process delivers RESULT no doubt

- But we miss
  - the opportunity to energize people to take on more aggressive change - innovate:
    - @ Work
    - In their lives
    - In Communities
    - Public Institutions

- Organizations’ aspiration for CSR, and ESG initiatives (the public has a hunger for responsible corporate behavior)

- We stretch the boundaries of our scope for Good – isn’t that what makes us professionals?
What is the Change

- Clarity around RESPONSIBILITY and ACCOUNTABILITY

- Makes clear that EA/PMO are service providers not the owners of enterprise capabilities

- Focus is on Engagement, RESULTS are just an outcome
How to Drive Change: Fuel Vs Friction

- Fuel: more emphasis on communication (Marketing and Sales)
- Friction: understand what are the obstacles that prevent us from making these subtle but important changes
WS 307

Case Study

Re-imagine Transformational Change
Enterprise Data Platform
Share our Experiences

Goal: Improve our Understanding of how to Plan for Transformational Change
Workshop Plan: Workshop Theme – Plan the Work & Work the Plan

Data Points:

1. Business Requirements
2. Roadmap and Backlog
3. Executable Agile Plan

Workshop Activities:

- Context Setting
- Exercise (√)
- Discussion (√)

Opportunity: Enterprise Data Platform
**Workshop Plan:** Workshop Theme – Plan the Work & Work the Plan

### 1. Business Requirements

**Steps**

1. **Identify Stakeholders and Brainstorm their typical concerns**
2. **Create engagement threads (different for each group of stakeholders)**
3. **Learn from their Lived Experiences**
4. **Repeat 1,2,3**
5. **Hypothesis: Refine the Opportunity and Problem to Solve**
6. **Repeat 2,3**

**Enterprise Data Platform**

- **Current State:** Enterprise Data warehouse, Tons of data but little confidence and value
- **Target State:** Leverage Data to help create Strategic Advantage

**Budget, Three Years, Sponsor Investigation Budget:** $150K

**First Cut Roadmap, Overall plan, and 30-day action plan**

**Workshop Activities**

- **Context Setting.**
- **Exercise.**
- **Discussion.**

If you are not getting enthusiastic engagement from the stakeholders, you are not on the right track.

**Mechanical Vs Cognitive Engagement**
Workshop Plan: Workshop Theme – Plan the Work & Work the Plan

Business Requirements

Steps

1. **Identify Stakeholders** and Brainstorm their typical concerns

2. Create engagement threads (different for each group of stakeholders)

3. Learn from their Lived Experiences

4. Repeat 1, 2, 3

5. **Hypothesis:** Refine the Opportunity and Problem to Solve

6. Repeat 2, 3

Context Setting.

Exercise.

Discussion.

Responses

CFO, COO, data stewards / the people who actually use the data catalog, Data/business process owners as stewards of data, Line of business people, DBAs consumers of the platform
Workshop Plan: Workshop Theme – Plan the Work & Work the Plan

1. Business Requirements

Context Setting.

Exercise.

Discussion.

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Responses

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Workshop Theme: Reimagine Transformational Change
**Workshop Plan:** Workshop Theme – Plan the Work & Work the Plan

### Business Requirements

**Context Setting.**

**Exercise.**

**Discussion.**

**Steps**

1. **Identify Stakeholders** and Brainstorm their typical concerns

2. **Create engagement threads** (different for each group of stakeholders)

3. **Lived Experiences & Insight**

4. **Repeat 1,2,3**

5. **Hypothesis:** Refine the Opportunity and Problem to Solve

6. **Repeat 2,3**

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   - **Steps**
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     4. Repeat 1, 2, 3
     5. **Hypothesis: Refine the Opportunity and Problems to Solve**
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   **Exercise.**

   **Discussion.**

   **Responses**

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3. Learn from their Lived Experiences

4. Repeat 1, 2, 3

5. Hypothesis: Refine the Opportunity and Problem to Solve

6. Repeat 1, 2, 3, 4, 5 and Draft Roadmap

Context Setting.

Exercise.

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**First Cut Roadmap, Overall plan and 30 day action plan**

**Agile Roadmap (multiple parallel paths)**

1. Implement New Data Platform
2. Rethink Data Use (current processes)
3. Route Data from Source Systems to new Platform
4. Migrate (Selected) Historical Data
5. Create Change – change creates momentum
6. Self-Serve Buffet of Data
7. ML/AI, Generative Data
8. Integrate Real-Time – Streaming Data

**30 days to create Arch Vision (Mini Roadmap)**

**30 Day milestone (results promote engagement)**
Workshop Plan: Workshop Theme – Plan the Work & Work the Plan

Roadmap, Milestones ↔ Backlog

Glows & Grows

Glows – what went well
- Enthusiastic engagement of people who support EDP.
- Needed to balance the needs of these people

Grows – area to improve
- Poor engagement of people who use EDP.
- Exploring ways to improve their engagement.
- Build trust and relationship.

What Helped
We didn’t call Requirements – Business Requirements Called them stakeholder Lived Experiences
That created empathy among people, not tribalism.
It all became us not us and them.

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**Line of Sight to Results (updated continuously)**
Workshop Plan: Workshop Theme – Plan the Work & Work the Plan

Agile Project Scope with Each Path

Glows & Grows

Glows – what went well
- Enthusiasm and Silos Busting

Grows – area to improve
- It brought another level of complexity for PM and SA to work together – targets are moving

Highlighted

Value and Implications of Agile Framework

Management support
- focus on grows because glows were so valuable (no going back)
RESPONSIBILITY & ACCOUNTABILITY for Business Requirements?

Bust Myth

There is no such entity called Business, everyone in the organization is a Business

Reality

• Look at the impacted stakeholders
• Who has the fiduciary responsibility to manage the concerns of these stakeholders?
This kind of headline happens because we don’t think about all impacted stakeholders

We pay attention to only selected few
Re-imagine Transformational Change

Why People Engage

What motivates people to get engaged?
- Mechanical Work
  - Carrot and Stick Approach works
- Cognitive (requires thinking) Work
  - Autonomy
  - Mastery
  - Purpose
Ref: YouTube

The next big task for EA and SA Professionals
How to engage people and overcome obstacles?
Next for Your Career Path
Re-Imagine Transformational Change

Future Workshops – Mentoring Sessions

Organization

Private Event

Community

Public Institutions

Public Event Every Month

#doBetter, #helpdoBetter
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Thank You