

White Paper

A Modeling Personal Trainer

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Peter has worked with modeling standards and techniques throughout his 20 years in IT, in a career that has covered software development, solutions architecture and international consulting.

Peter's particular areas of interest are opportunities arising from interdisciplinary touchpoints, how to balance practicality and rigor when modeling, and the importance of viewpoints in addressing different stakeholder perspectives.

I sometimes joke about how some organizations buy a modeling tool in the same way that people join a gym. People join a gym and fail to get benefits from the gym because they don't actually go and exercise. In the same way, many organizations buy a tool, even appoint a chief architect... but they don't go through the discipline. One approach to getting going with an exercise program is to use a personal trainer – the same is true of a modeling practice.

Summary: A good way to get value from architecture consultancies that I've seen is to have them come in for regular visits to check up on progress and introduce concepts and disciplines over time. This is in contrast to a 'big bang' of effort where a consultancy comes in at the start, tosses 'the product' over the fence and then leaves. At the end of this paper are some recommendations for how to approach such an engagement.

The trap of using an EA consultancy

Over the past 7 years I've consulted at organizations and sold to organizations that have implemented Enterprise Architecture (EA), and it's surprising how often I see an organization where their EA effort started out with a rush of energy, got as far as defining current state and principles, and then all this work sat on the shelf. Often in such cases (but not always), an outside Enterprise Architecture consultancy has been involved in the initial rollout.

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It's not uncommon that an organization trying to implement an architecture practice brings in an outside consultancy to define processes, perform current state analysis and so on. Unfortunately, what I've seen more than one organization do, is have the consultancy in at the start – and only the start. Generally there are good intentions about performing some kind of gradual transition, so that the in-house team gradually takes ownership of the architecture. Or perhaps there's a vision of the consultants handing over a finished product that merely gets maintained. Regardless, in both cases – it just doesn't happen. Other things come up, and the unscheduled, unplanned transition never seems to happen.

The net result is that the consultants end up working in isolation, producing an excellent work product that immediately gets put on the shelf – and this makes the whole effort pointless.

However, I have seen outside consultancies be very effective at a few organizations, and in each case the reason for the success has been an acceptance that it's the organization that has to make the running, not the consultancy. After all, to return to the comparison with the gym, you wouldn't expect to hire someone else to do all the exercise for you while you got on with something else, and for this to somehow make you fitter? Well, maybe one or two managers I've known would, but not in general at least.

Modeling and the Gym

Now, this comparison with exercising at a gym is not as whimsical as it might seem. Both require the investment of effort and pain up front to achieve a noticeable change. Both require a fight against inertia and built-in habits. In both cases, you need to apply techniques that will be unfamiliar at first, and in both cases, there are variety of frameworks and theories to apply, some of which overlap.

The point here is that when adopting the disciplines of enterprise modeling – business process, enterprise architecture, IT governance – one must remember that they all involve a transformation, just as adopting an exercise program is aimed at a personal transformation. In both cases, the transformation is slow and continual one.

At the same time, in both cases you're having to learn new techniques and new approaches. There's a whole range of techniques and approaches, and different experts will provide different advice, sometimes contradictory.

Now, it's a rare gym these days that doesn't also try to up-sell you on a personal trainer. And, provided that you approach them correctly, they have value – you just have to engage with them in the right way. In the same way, I'm proposing that engaging an EA consultancy can be a good move, when based on the personal trainer model – regular

sessions on an ongoing basis that don't risk having the consultants actually do all the work. Just as with a personal trainer, there are several rules that you can apply to ensure that this approach yields value, and in the rest of this paper I'm going to talk through them.

Establishing what you want to achieve

The first thing to consider is: what do you hope to accomplish by engaging this personal trainer? What are the goals here? There is a huge set of objectives that you could aim for – and some naturally will take longer than others. To make things manageable, what I've seen work best is to establish a roadmap, with checkpoints. What do you need to accomplish in the short term and the long term?

Of course, short-term and long-term are woolly concepts, so in practice these need to be translated into specific time frames. Is the short term three months? Six? To establish these time frames, it's going to be most effective to consider what other transformation efforts have been implemented (e.g. release management, a central service desk) and how long they took for their various phases in the organization.

Recommendation: Define a short-term time frame and a long-long time frame.

In terms of setting the specific goals/there are two kinds of goals that you can establish. First of all, there is the tangible work products that you hope to have. Are you looking to establish a set of reference architectures? A set of design principles? Are you looking to work through a detailed pilot project using the architectural disciplines that have been established? Whatever mix of tangible outputs that need to be achieved in the time period, they, like all objectives, should follow the SMART paradigm (Specific, Measurable, Achievable, Realistic, Time-based).

Recommendation: define specific goals to work towards in a given time frame.

There is a second type of objective that you may wish to accomplish. Specifically, the acquisition of competencies. Are you looking to have, say, three members of the team who are local centers of excellence in ArchiMate? Are you looking for someone to be an expert in the use of reference architectures? I've written elsewhere on the Orbus site about the value of having in-house resources, and it's worth considering what you need in this regard and who should fill these slots.

Recommendation: define the in-house competencies that you want to achieve

Choosing your ‘personal trainer’

While it should go without saying that a consultant should come with some recommendations. And the cultural fit needs to be there – can you get on with them? There are one or two less obvious aspects to consider.

One of the less obvious considerations is awareness of industry drivers. Design is inherently about tradeoffs, and this is just as true for designing a modeling discipline as it is elsewhere. This in turn means that, say, a high level of control and review may be appropriate for a bank while an electronics manufacturer may be more focused on accomplishing co-ordination between different sites around the globe.

What this all points to is that the consultant that you engage with needs to have an understanding of the specific areas that are important to your organization, and why they are important. So you should question the consultants that you are considering as to the specifics. At the same time, if they are unable to name past clients in the same industry (this could be due to confidentiality clauses as much as due to lack of experience), they should be able to express the experience that they have in other industries with similar challenges. An interesting evaluation question in this case would be to ask why the experience is relevant.

Recommendation: Look for a consultant who can talk to your industry-specific drivers.

Another question that needs to be posed is: what awareness do the consultant or consultants have of developments in the industry. Can they speak to developments in ArchiMate? Have they seen any interesting discussions recently? This matters because it indicates their dedication to ongoing professional development, and because it ensures that you are getting exposure to the latest standards and schools of thought.

Recommendation: look for a consultancy whose staff can talk to current developments in best practice.

The last thing to consider in evaluating the consultants is the question of methodologies. TOGAF, of course, has the Architecture Development Methodology, but many architecture consultants come with one of their own – possibly complementary, possibly not. This should not necessarily be a deal-breaker. TOGAF, by its very nature is a committee effort and attempts to be a ‘one size fits all’ approach that needs to be tailored, and the consultancies that propose their own methodologies do so to address the shortcomings that they see in industry standards. However, there are two considerations to be wary of in this case.

The first question to be aware of is how much commitment a given consultancies methodology requires to learn their approach; and how well it interacts with other approaches such as, say TOGAF, or COBIT.

The second question is to consider what industry-specific frameworks exist. The telecoms industry has Frameworkx. The insurance industry has ACORD. The APQC has various industry-specific process reference models. So a question for the consultancy under consideration has to be – what frameworks do they know about that might apply and how? Does the consultancy’s methodology interact with these frameworks?

Recommendation: Be aware of methodologies and in particular how they interact with industry standards.

Crowdsourcing your use of the consultants

An important final point, which can be overlooked, is ensuring a mechanism to collate questions from the team to pose to the consultants in one of their visits. As the team works on adopting the new disciplines of modeling, process, architecture and so on, individual members will find themselves coming up with their own questions. These could be anything from “how should I show permissions in ArchiMate?” to “How can I estimate savings for this project?” Whichever the questions are, it’s worth setting up a shared area that members of the team can use to submit them. In this way, the questions don’t get forgotten and the answers become a shared knowledge-base style resource visible to everyone.

Recommendation: Provide a mechanism for members of the team to submit their own specific questions in a shared location, and schedule time for the mentor to answer them.

Conclusion

As I stated at the start of this article, the comparison between architectural modeling and working out might seem whimsical, but there are several points of similarity:

- Up-front efforts for later benefits
- The transition tends to be slow and takes place over many weeks
- There may be a need to learn unfamiliar techniques
- There’s always a temptation to put off the discipline until later in the face of time pressure – you have to consciously make the time for the effort
- It’s usually possible to find different experts who flat out contradict one another

This similarity probably explains why organizations that I see follow the personal trainer approach in engaging with a consultancy tend to be noticeably more successful than those that bring in an outside consultancy almost as a temporary 'special projects' team. Doing so is not a magic bullet, of course, and there are a few techniques that you can apply to make the 'personal trainer' approach more successful. These are:

- Define a short-term time frame and a long-term time frame
- Define specific goals to work towards in those time frames
- Define the competencies that you want to achieve in those time frames
- Look for a consultant who can address your industry-specific drivers
- Look for a consultancy whose staff can talk to current developments in best practice
- Be aware of methodologies and how they interact with industry standards
- Provide a mechanism for members of the team to submit their own specific questions in a shared location

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