



Embarking on Shared Information Management Initiatives

Reader ROI

- Many companies are increasingly challenged by the growth of investments in siloed information repositories.
- Interrelated initiatives must be pursued to mature capabilities that support information management (IM) shared services.
- An IM shared services framework can help guide the shared services program.

Introduction

In many companies faced with the challenge of managing investments in siloed information management systems, corporate IT often is charged with providing shared technology services.

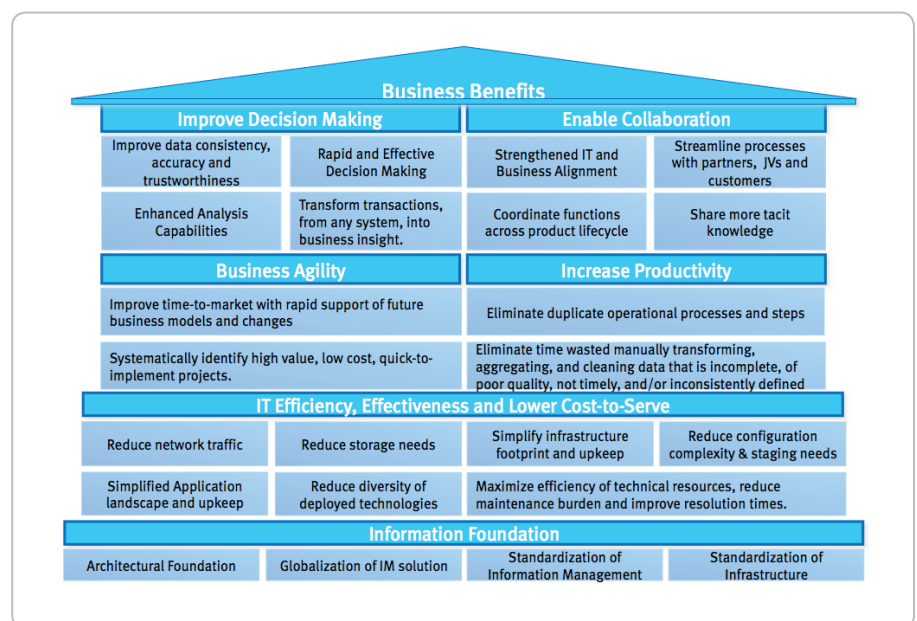
Although many of these services (e.g., data, web content management, document management, enterprise search/taxonomy management, data warehouse/business intelligence) optimally would be managed as shared assets for the enterprise, the IT organization encounters obstacles in executing a shared services strategy. Addressing the interrelated initiatives that are needed to support information management (IM) shared services increases the likelihood of success:

- Articulate the vision, value proposition, and business case for investing and supporting in shared technology services.
- Define the service delivery model for interacting with business and/or aligned IT customer—managing expectations, providing service and support, and reporting performance metrics.
- Define the governance, organizational, and charge-back models for managing shared services.
- Develop a roadmap for reaching desired levels of maturity along the organization, process, and technology dimensions.
- Identify early adopters or pilot implementations that later can form the foundations for full-scale rollout.

Business benefits of IM shared services

IM shared services hold the promise of delivering a broad range of benefits to all aspects of the organization—business, operations, and information technology. Figure 1 shows the “house of business benefits” built on the foundation of IT benefits.

Figure 1. Data Services Value Proposition



The IM shared services framework

The success of a shared services initiative will depend in great part on the environment and the underlying capabilities of the organization. Five critical areas must be considered and matured in order to ensure success.

IM shared services business environment

Because support for IM shared services must come from corporate executives and strategic business unit leaders, the first step is to align the key agile architecture principles with the corporate and business unit strategies.

At one company, the CIO established a vision for improving the effectiveness and efficiency of enterprise content management (ECM) across the enterprise. The vision was centered on building a common core of ECM software and hardware services. Business units and corporate groups were expected to leverage these shared services in the development of business-specific ECM solutions. It was made clear that IT assets must be aligned with core business processes and that asset reuse/sharing was paramount.

The company's success stemmed from the fact that top management explicitly drew a link between the need to support IM shared services and the corporate and divisional business strategies. The value proposition to business leaders was clear: investing in shared capabilities would contribute to their achieving their business goals.

The alignment between IM shared services strategy, business strategy, and clear value proposition sets the stage for incentives and metrics tied to specific IM shared services objectives (e.g., percent of divisional spend on core vs. strategic IT assets).

Organization for IM shared services

The organization is critical for enabling the development and delivery of IM shared services. The governance model must address roles, responsibilities, and staffing to maintain acceptable service levels.

From defining the initial scope definition of IM shared services in the enterprise to managing the ongoing lifecycle of the shared IM assets, the IM organization manages key functions related to demand, funding, development, and maintenance of IM shared services. This organization builds and delivers the services to internal enterprise customers and defines and manages the charge-back model.

Center of excellence resources provide service delivery capabilities, supporting business requirements, designing the technical solutions, defining the information standards, and providing consulting services to aligned IT groups seeking to incorporate IM shared services and/or components in their divisional applications.

There are two main pitfalls to be avoided in building out IM shared services: under-funding the IM organization and underestimating the change management challenges.

By starving their IM shared services organization of headcount, some organizations undermine efforts to achieve goals. As a result, business-aligned IT groups, who source services from the corporate IM services group, are disappointed and, thus, resist further adoption of IM shared services.

Failing to prepare for the change management challenges for both the new shared services organization and the aligned IT groups who use the services also undermines success. Time and resources must be allotted for communications and training efforts so that shared services staff members, who may be new to their roles, have time to learn what is expected of them. Likewise, IT groups need time to absorb the implication that they no longer have carte blanche in selecting application components and setting local information standards. Because the value proposition for adopting IM shared services may take time to be communicated and understood, moving too quickly can cause confusion and increase resistance.

IM shared services processes

Once the strategy is in place, the prioritization of IM services is clear, and the governance and delivery organizations are defined, the company must focus on building out mature (e.g., repeatable, high-performance) processes for IM shared services. These key processes include:

- **Capacity planning and resource management:** The IM services organization must have an agreed-upon process for managing the staffing and budget allocations to support ongoing maintenance and new development of IM shared services. This process needs to work hand in hand with the demand management process that is owned by the governance organization and coordinated by the IM shared services leadership.
- **Metrics and reporting:** Service-level agreements should be established between the IM shared services organization and its customers in aligned IT groups across the enterprise. IM shared services leadership and the governance organization need to be updated regularly on the performance of the IM service delivery organization, the utilization of center of excellence resources, and the use of IM shared services and components. These updates drive the capacity planning and demand management processes, establishing the basis for changing the levels of support and investment required to maintain service levels.
- **Service creation, maintenance, and delivery:** Like other IT initiatives, IM shared services must adhere to information and application architecture standards and be subject to software development lifecycle management with architecture review and quality checkpoints.
- **Communications and customer interaction management:** As an internal supplier of services to aligned IT groups across the enterprise, the IM shared services group must provide an account management function to coordinate communications with internal customers, manage expectations, convey requirements, and resolve service delivery problems. Success is measured by customer satisfaction.

IM shared services offering

The IM shared services organization provides not only technology-based services, but also information standards and architecture artifacts. The latter can speed the development efforts of aligned IT groups even if they do not adopt IM shared technology services.

IM shared services fall into three categories:

- **Self-service utilities:** These are discrete application components that can be discovered on the network and called either to provide specific functionality or to return information requested by consuming applications. Examples include employee directory lookup services, data storage/archival management services, single sign-on/authentication, PDF-to-HTML document transformation services, and a variety of so-called web services. Ideally, these services require little to no client-facing support by the IM shared services organization.
- **Configurable, shared components:** These are technology services that must be configured to meet the needs of the consuming application. Examples include document workflow services configured to meet the requirements of a specific business process, reporting customized to meet the presentation requirements of specific stakeholder groups, etc. These services may require low to medium levels of client-facing support to ensure that aligned IT groups can integrate these services with their applications. When these services are well-designed and documented, internal customers who use them can be self-sufficient.
- **Reusable information assets:** These assets can speed the design and development activities of aligned IT groups, even if the group does not subscribe to shared IM technology services. They can include reusable code fragments, data models, application architecture artifacts, information standards, testing best practices, etc. The shared IM group is uniquely positioned to harvest these assets from teams across the enterprise, scrutinize them for potential reusability and conformance with enterprise information and application architecture standards, and index and store them for easy search and retrieval by development teams.

Infrastructure support for IM shared services

Just as the IM shared services group provides shared services to aligned IT groups, the IM shared services group is an internal customer of the enterprise infrastructure group. Its ability to meet the needs of its customers relies in part on the service levels negotiated with the enterprise infrastructure group. These services include server maintenance, network bandwidth, server and application monitoring, etc.

Likewise, the IM shared services group may be maintaining a blended team of employees and contractors to provide the necessary flexibility in meeting demand fluctuations beyond base support requirements. Here, too, the IM shared services group depends on another corporate function to be effective, in this case the sourcing and HR organizations. The leadership of the IM shared services group must communicate group requirements in these technology and human resource areas to be able to meet its commitments to stakeholders in the business.

Choosing the right first step

It is vital to select “early adopter” projects that can provide important on-the-job training for the fledgling IM shared services organization without over-taxing it and, thereby, jeopardizing customer satisfaction and service levels.

When selecting early projects, consider the following points:

- There should be clear, measurable business value for the project.
- There must be a business sponsor who is motivated to support implementation.
- While the project should be substantial enough to demonstrate real value to the business, it must not be too complex to be completed in three to four months.
- The project should showcase IM shared services that may be in high demand by other aligned IT groups.
- A supportive user group, one that is motivated and flexible, should understand that the project is a learning opportunity for everyone.
- The project should involve a solution whose value can be realized incrementally, either over a number of releases or as users adopt the solution (e.g., is not an “all or nothing” proposition).

Because bringing the initial project online is the first real test of the new IM shared services organization and common platform, ensuring success in the initial phase will go a long way toward ensuring the eventual success of the initiative.



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