This process is a variation of the migration planning process, geared towards portfolio management

In practice, portfolio rationalisation may have to ride on the back of work done for other reasons

Avancier Methods (AM)

Enterprise Architecture

Planning portfolio changes – generalities

You want to rationalise/upgrade infrastructure architecture

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Avancier Methods for ENTERPRISE ARCHITECTURE

Rationalisation processes

- Generic rationalisation process
- Business structure rationalisation
- Data store rationalisation
- Application portfolio rationalisation
- Technology portfolio rationalisation

- **"navigate the stages of EA maturity" (MIT)**

The stages of EA Maturity (MIT)

4 Business modularity (6%)
- Reusable modules

3 Optimised core (34%)
- No data redundancy
- Enterprise systems (shared apps)

2 Standardised technology (48%)
- Fewer platforms
- Technology standards
- Shared infrastructure

1 Business silos (12%)
- Local apps and infrastructure

And/or rationalise/upgrade applications architecture

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And/or rationalise/upgrade data architecture

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And/or rationalise/upgrade business architecture

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You have described baseline and target architectures

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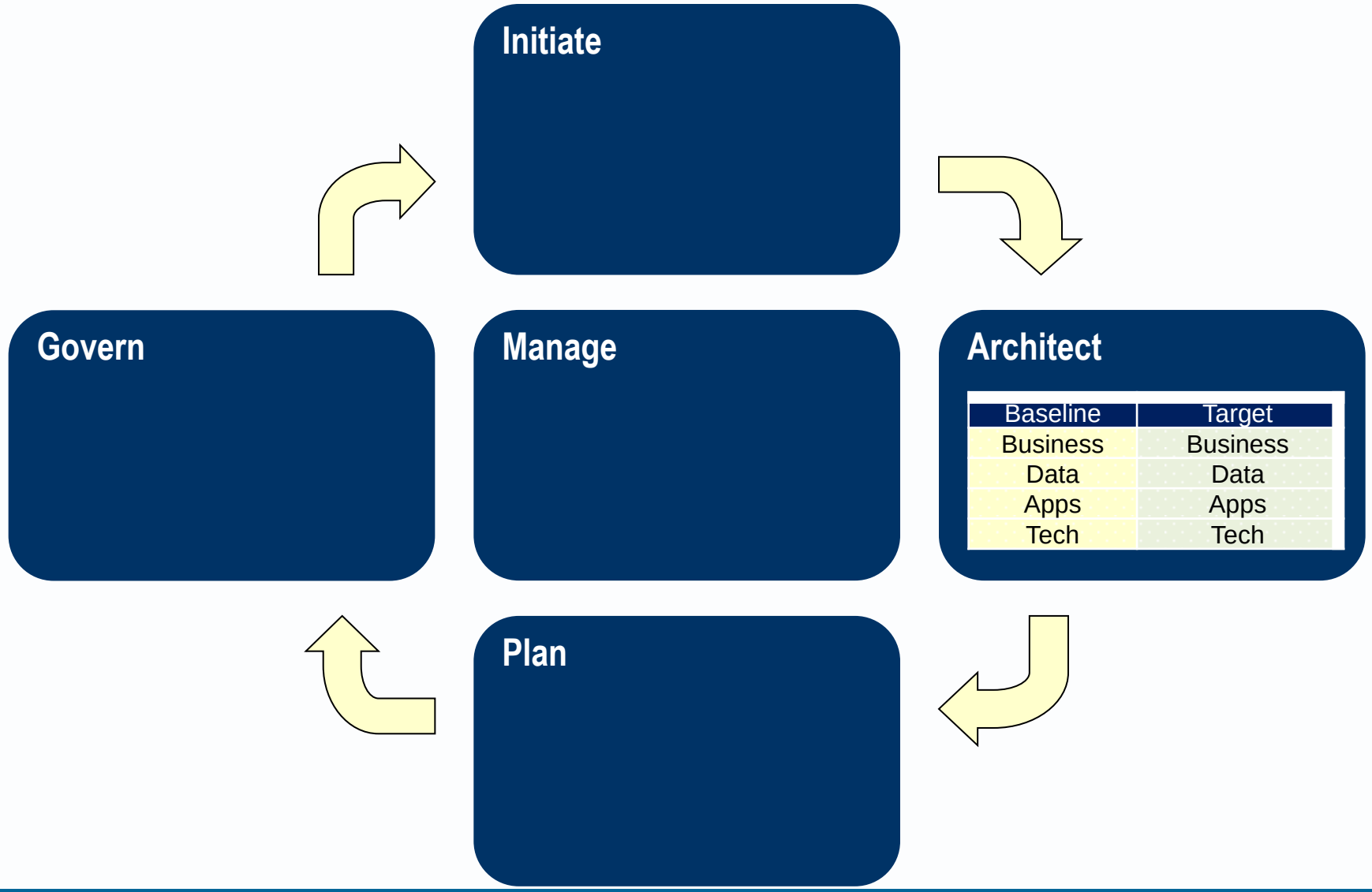
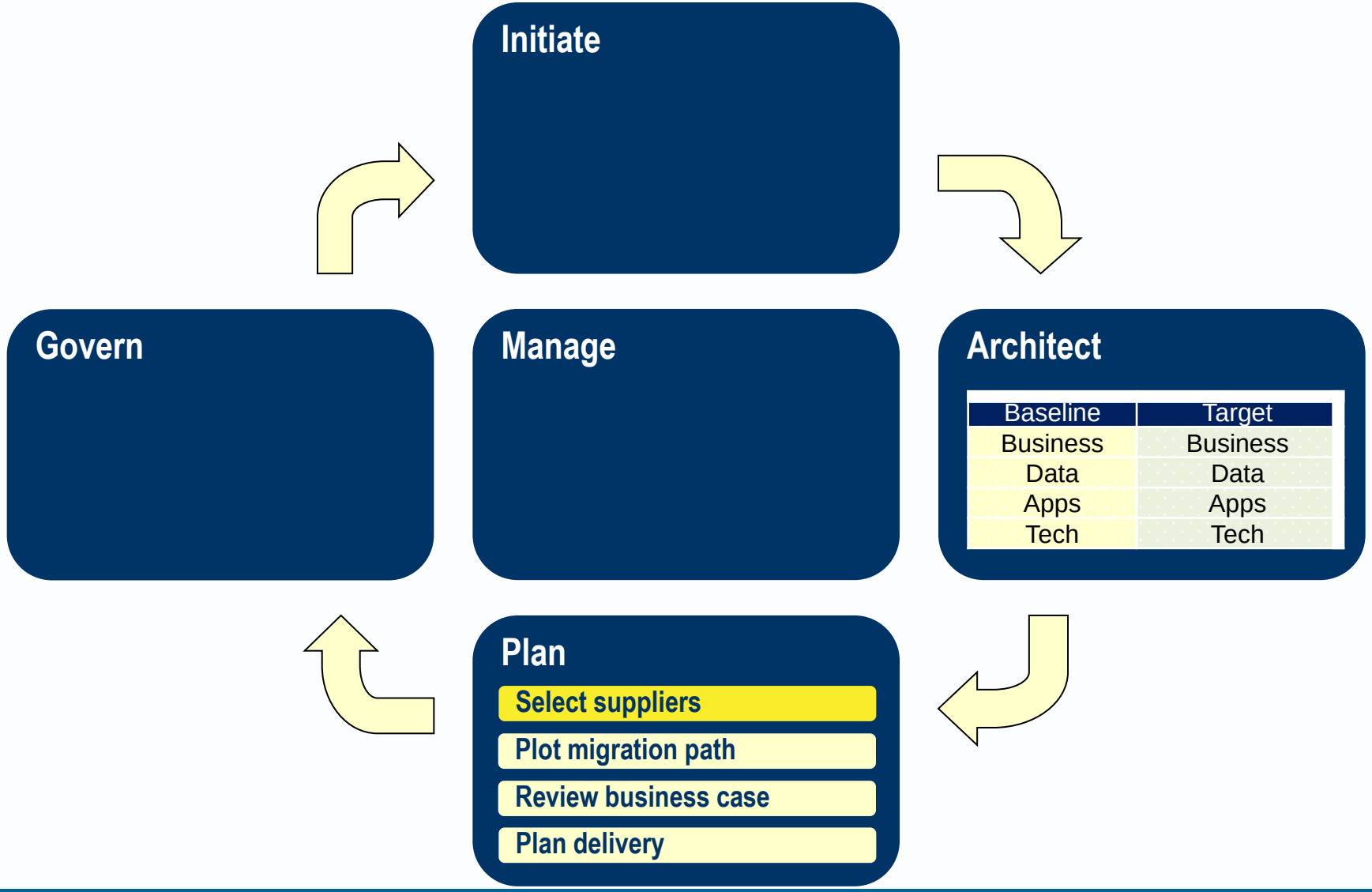


You've selected suppliers where need be



And you're ready to plan the changes

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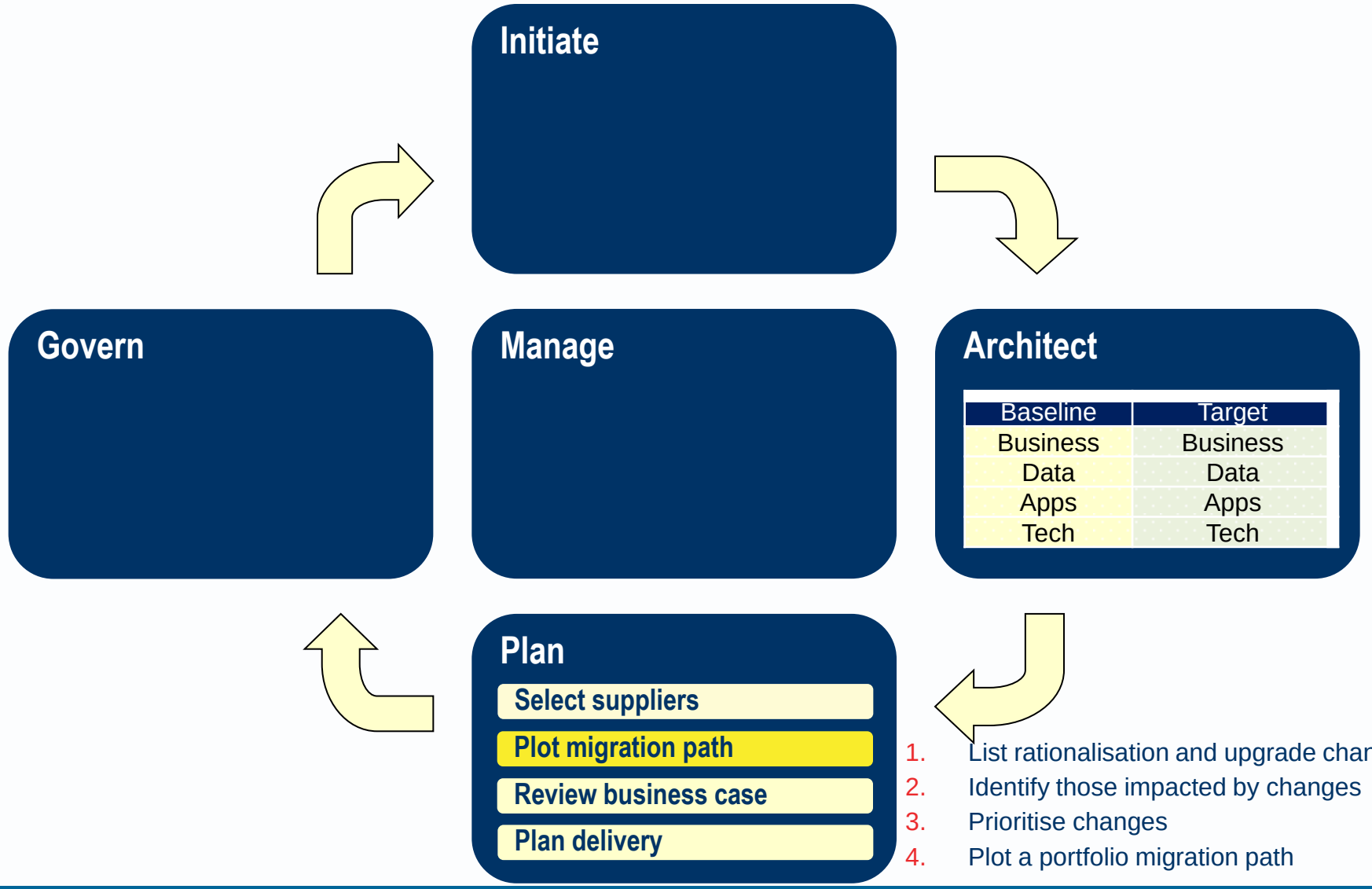

1. List rationalisation and upgrade changes
2. Identify those impacted by changes
3. Prioritise changes
4. Plot a portfolio migration path

1. List rationalisation and upgrade changes

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- Do a gap analysis between baseline and target architectures
- List all changes proposed by way of effort to rationalise or upgrade

Baseline	<<< Gap analysis >>>	Target
Business	What changes?	**Business**
Data	What changes?	**Data**
Apps	What changes?	**Apps**
Tech	What changes?	**Tech**

2. Identify those impacted by changes

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- Identify users/clients of resources that are to be rationalised or changed
- Determine users/clients who will be affected and how
- Determine data and server resources that need to be changed

Services	Baseline	<<< Gap analysis >>>	Target
Reporting	**Business**	What changes?	**Business**
Purchase to Pay	**Data**	What changes?	**Data**
Order to Cash	**Apps**	What changes?	**Apps**
	Tech	What changes?	**Tech**

Technology example

- Identify application clients of technology resources that are to be rationalised or changed
- Determine applications that will be affected and how
- Determine server resources that need to be changed

Application	Baseline DBMS				Target DBMS
Accounts	DB2				DB2
CRM	Informix Dynamic Server				Oracle
HR	Ingres				Oracle
Complaints	Microsoft Access				Oracle
R&D admin	Microsoft Access				Microsoft Access
Sales	Microsoft SQL Server				Oracle
Marketing	MySQL				Oracle
Suppliers	Oracle				Oracle
Products	PostgreSQL				Oracle

3. Prioritise changes

- Consider for each change
  - Value
  - Cost
  - Risk
  - Time
  - Urgency
  - Resources
- Prioritise changes

4. Plot the migration paths

- Divide migration into transition states

- Group changes that can be made together one transition
  - Changes to a business?
    - iterate through regions or locations?
    - follow the business value stream?
  - Changes to data and apps?
    - with changes to business?
    - with changes to platform technologies?
  - Changes to infrastructure?
    - with changes to business?
    - with changes to applications?
    - with changes to your data centre, equipment room?
    - with server consolidation and virtualisation?

Plot application migration path

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- A migration path or road map can be expressed in many ways and at many levels of detail

Services	Baseline	Transition 1	Transition 2	Target
Reporting	Old acc sys	**New acc sys**	**New acc sys**	**New acc sys**
Purchase to Pay	Old acc sys	Old acc sys	**New acc sys**	**New acc sys**
Order to Cash	Old acc sys	Old acc sys	Old acc sys	**New acc sys**
Old to new data feed		Version 1	Version 2	

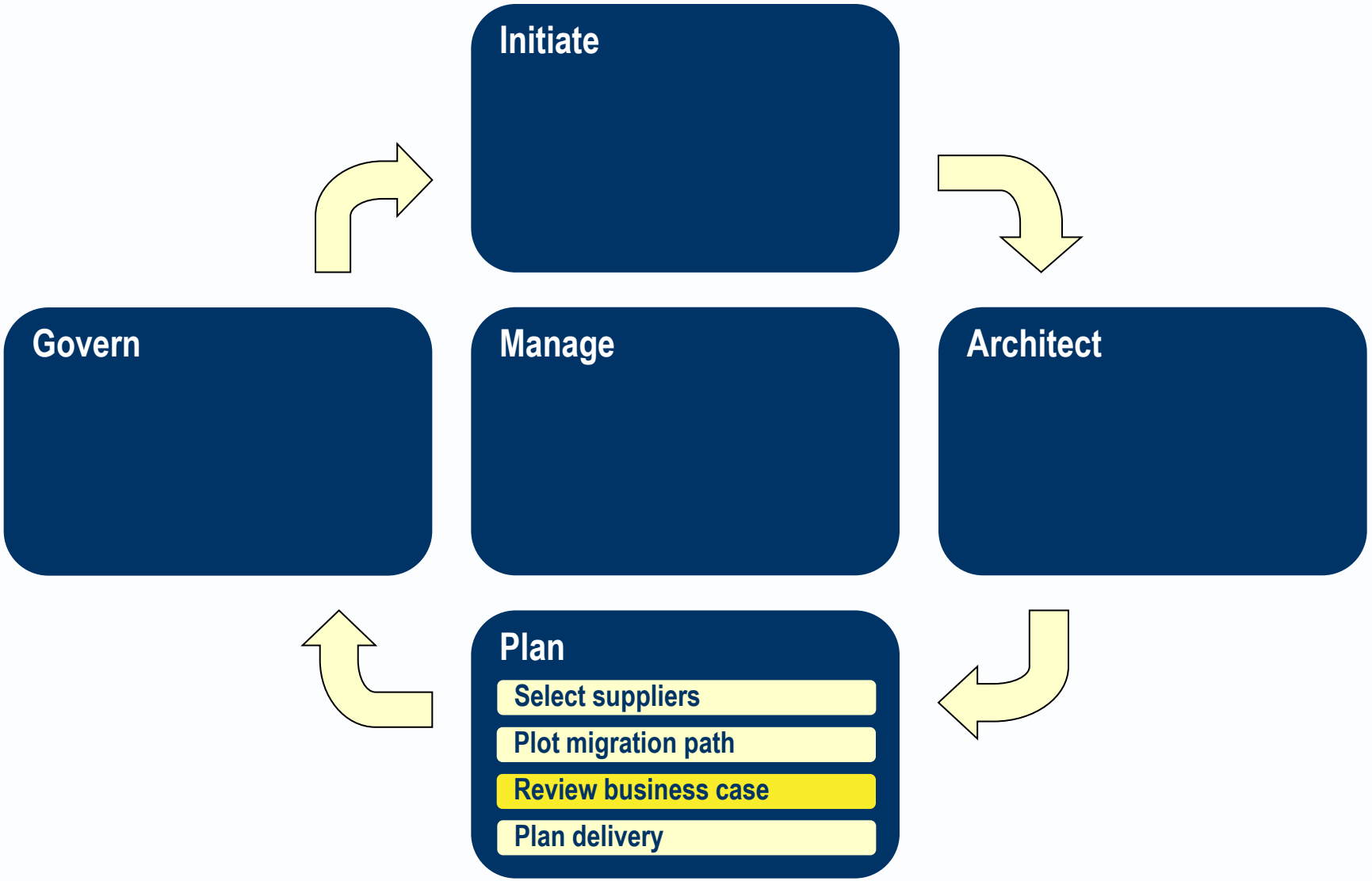
- Note temporary solution elements

Plot technology migration path

- Changes to a technology portfolio may be made on their own, or embedded in changes to the higher level application portfolio.

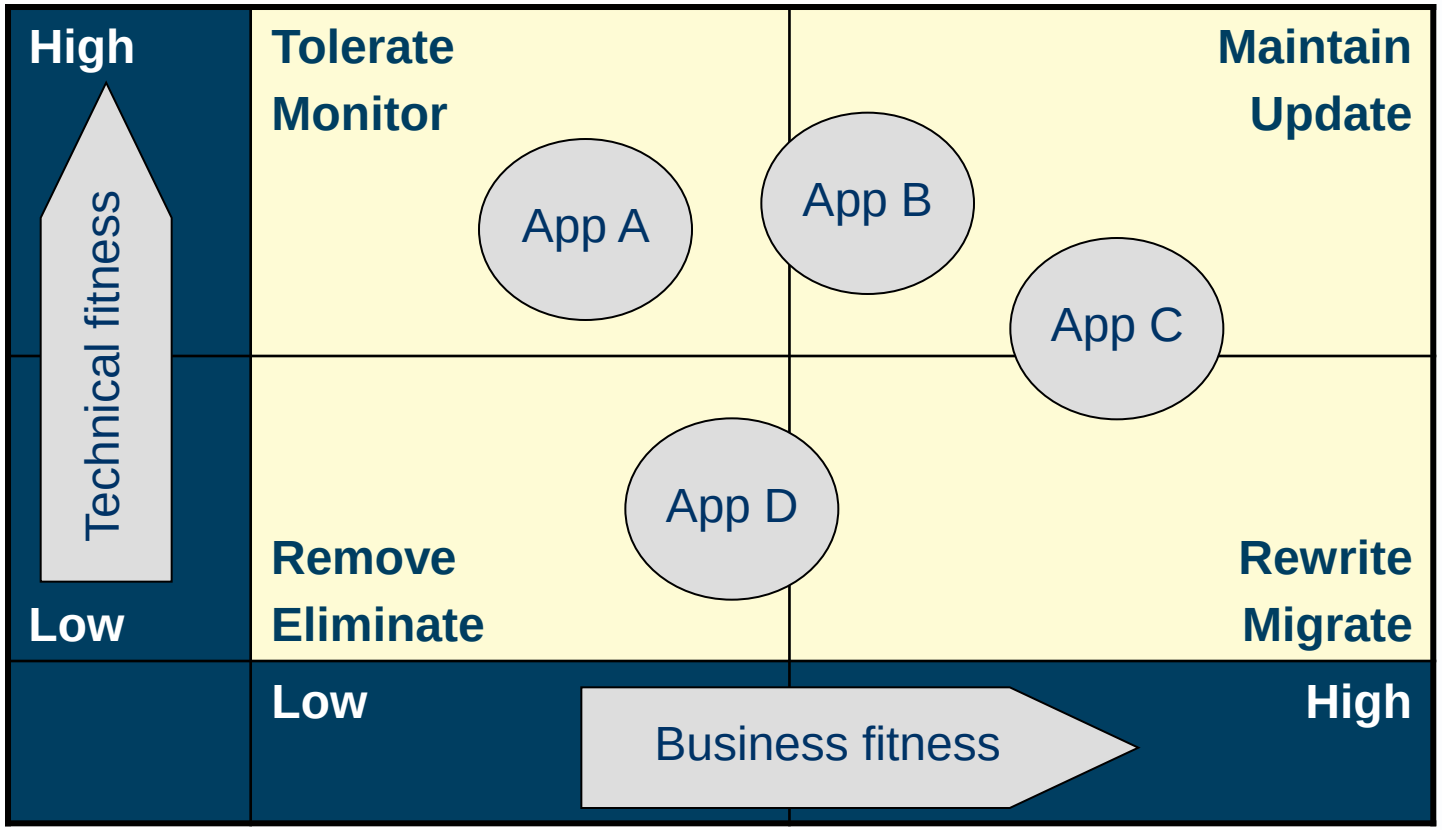
Application	Baseline DBMS	Phase 1	Phase 2	Phase 3	Target DBMS
Accounts	DB2			DB2 upgrade	DB2
CRM	Informix Dynamic Server	Oracle			Oracle
HR	Ingres	Oracle			Oracle
Complaints	Microsoft Access				Oracle
R&D admin	Microsoft Access				Microsoft Access
Sales	Microsoft SQL Server		Oracle		Oracle
Marketing	MySQL		Oracle		Oracle
Suppliers	Oracle				Oracle
Products	PostgreSQL			Oracle	Oracle

Review the business case



Presenting a justification graphically

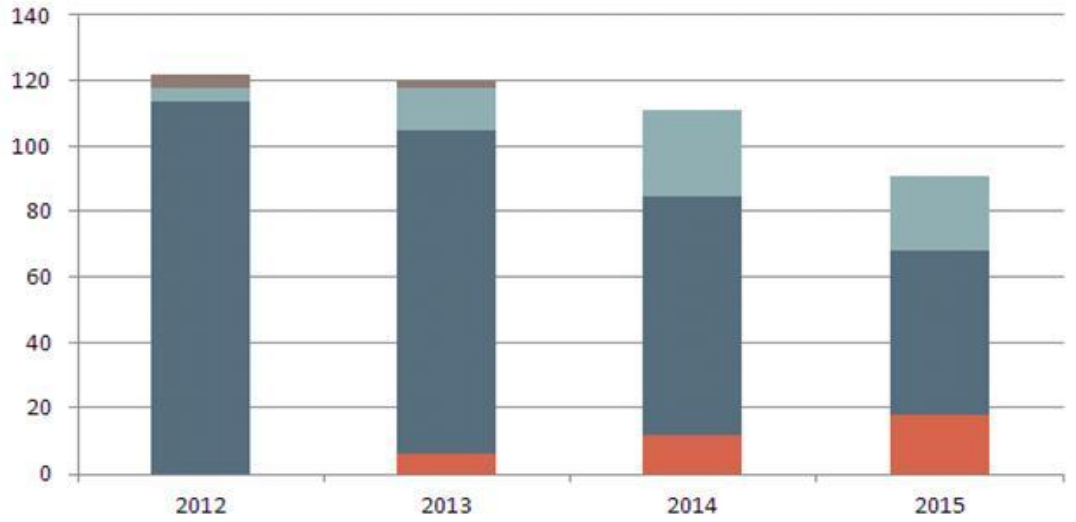
- The Boston Grid - a simple 2 by 2 classification scheme
- Often used to explain why changes are needed



Presenting a justification graphically

RESULT OF THIS STRATEGY | 2012 – 2015

- Graph showing projected system decommissioning effect on the [redacted] estate as a result of funded business projects
- Assumption is that funded projects are suitably scoped for system decommissioning



[redacted] Estate

Showing the projected effect of funded business projects

- EOL Committed
- EOL Proposed
- Live
- New

- EOL Committed = systems due to decommission; budget allocated;
- EOL Proposed = systems due to decommission; 2012 – 2015 funded project;
- Live = systems in production as at 2012 baseline;
- New = new systems over 2012 baseline; assume 5% Y/Y growth

OPEX Reduction: ~$[redacted]m

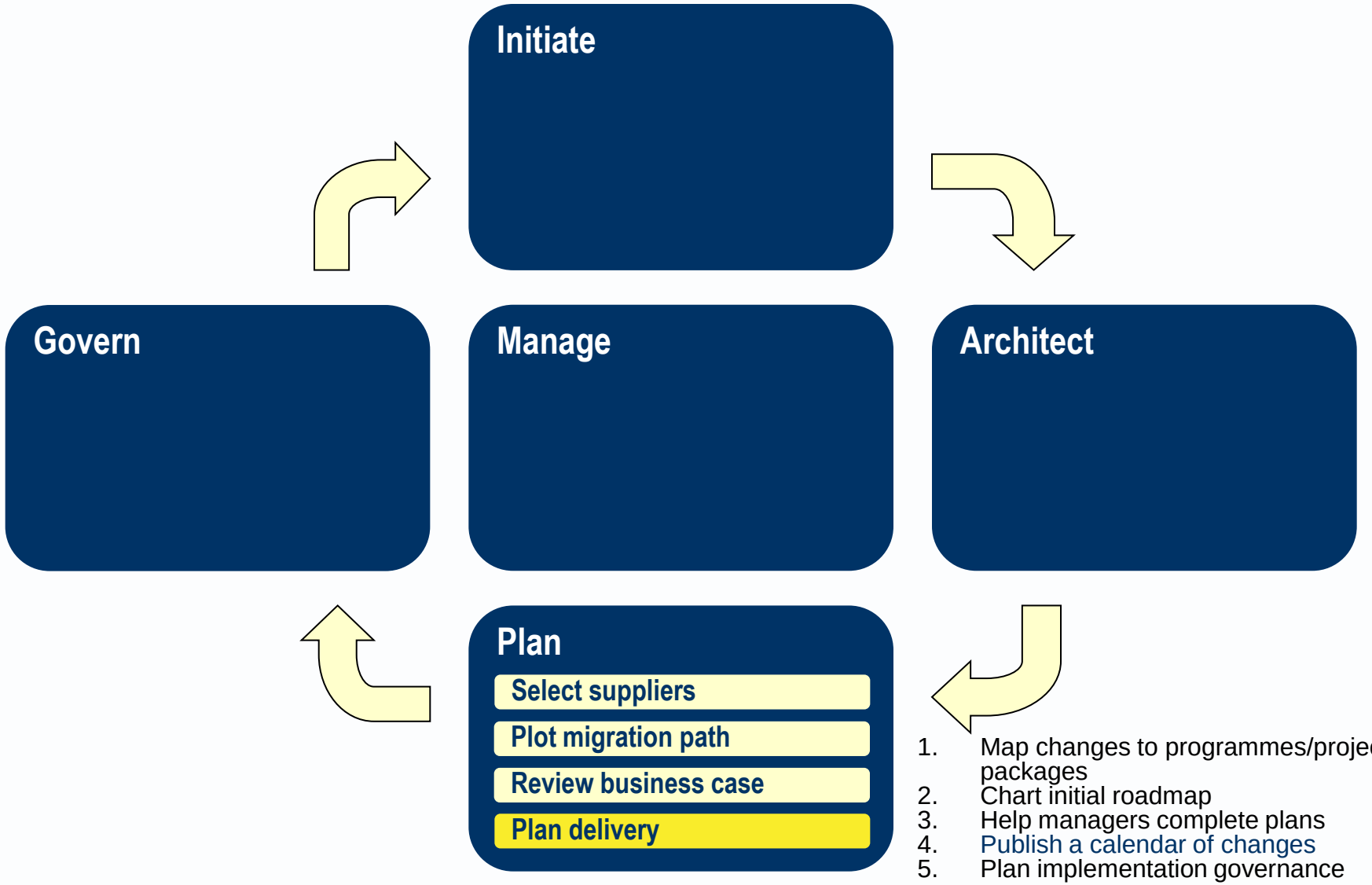
System decommissioning projected to yield savings [redacted] against 2011 cost-actual baseline:

~$[redacted]m E[redacted]
~$[redacted]m C[redacted]
~$[redacted]m O[redacted]
~$[redacted]m E[redacted]
~$[redacted]m 2[redacted]
~$[redacted]m R[redacted]

Operational Risk Reduction:

- Significant reduction in out-of-support and non-compliant software technologies
- Reduced dependency on niche-skill FTE and vendor resources
- Greater agility through use of Cloud and infrastructure virtualisation; fewer systems to support, maintain

Plan delivery



1. Map changes to programmes/projects/work packages
2. Chart initial roadmap
3. Help managers complete plans
4. Publish a calendar of changes
5. Plan implementation governance

Map changes to programmes/projects/work packages

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Function	Baseline Org	Phase 1	Phase 2	Phase 3	Target Org
Product dev	Marketing			See Plan 3A	R & D
Marketing	Marketing				Marketing
Sales	Sales				Sales
Sales	Operations	See Plan 1A			Sales
Payment capture	Operations		See Plan 2A		IT
Fulfilment	Operations				Operations
Customer service	Operations			See Plan 3B	Customer service

Use Case	Baseline App	Phase 1	Phase 2	Phase 3	Target App
Sales report				See Plan 3A	ERP-BI
Capture Order	Accounts	See Plan 1A			ERP
Invoice for Payment	Accounts		See Plan 2A		ERP
Receive payment	Accounts		See Plan 2A		ERP
Bank payment	Accounts				
Delivery	Operations		See Plan 2B		ERP
Add Product	Product catalogue	See Plan 1 A			ERP
Add Customer	Sales	See Plan 1B			CRM

Chart initial roadmap

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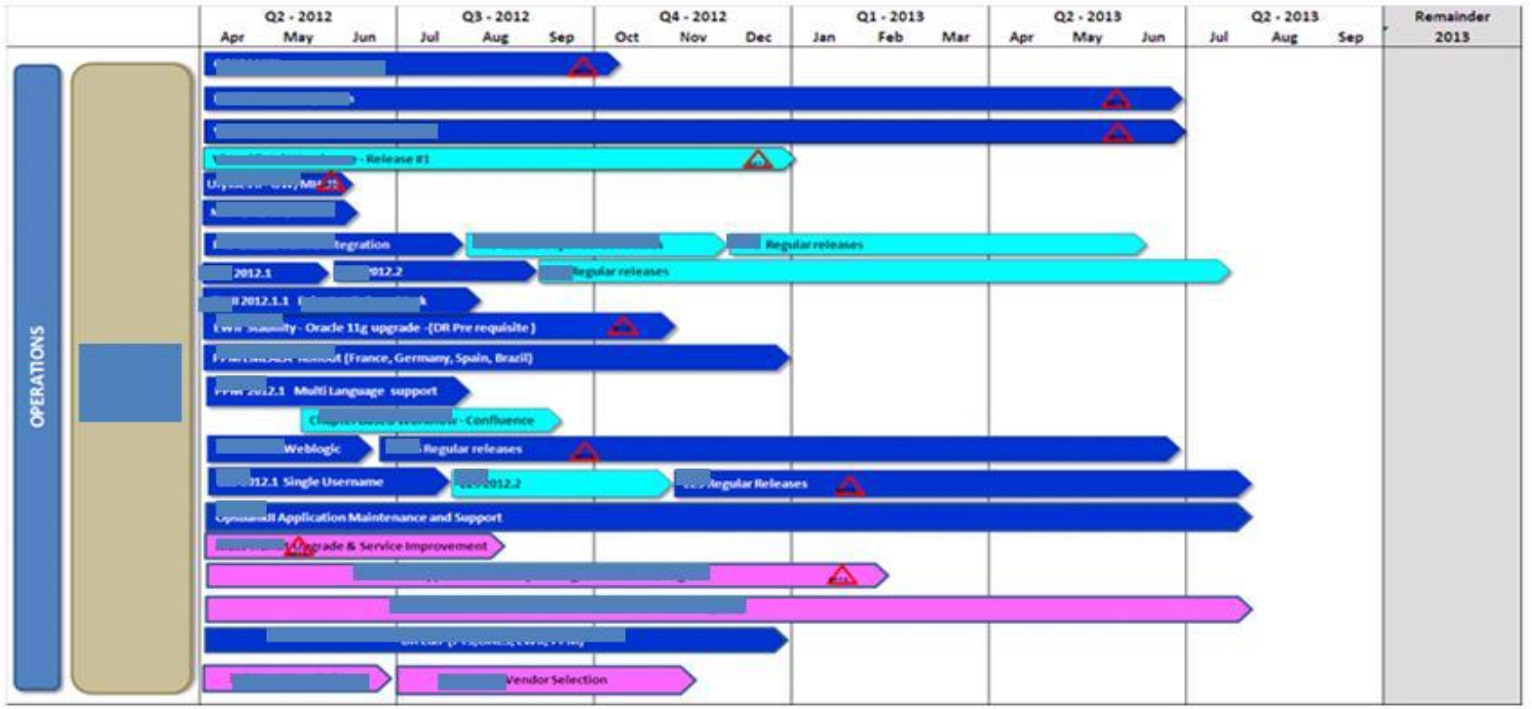
PROJECT ROADMAP | 2012 – 2013

- Key:
  - In Progress
  - Pipeline Demand
  - Concept / Bus Case
  - On Hold
  - Demand likely to impact [redacted] data centre capacity



Help managers complete plans

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- Engage with PMO to plan changes to portfolios of
  - Business functions, roles and processes
  - Data entities and data stores
  - Applications and data flows
  - Technology infrastructure

- Strive to deliver business benefits at each stage

Publish a calendar of changes

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- The technology catalogue below has been extended with a calendar to show when changes are expected.

Emerging	E
Standard	S
Contain	C
Retire	R
Unsupported	U
Archived	A

Tech Category	TAF Product	2010				2011				2012				2013			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
"Application Servers"	"Application Servers"																
	RedHat x.y		S														
	Tomcat		S														
	WebLogic App Server 10.x	S															
	WebLogic App Server 9.x	S							C								R
	WebLogic App Server 8.x	C						R									
"Web Servers"	"Web Servers"																
	Apache 1.x		S														
	Apache 2.0	S				C											
	Apache 2.2x		S														
Portals	Portals																
	Accordant Media Management System																

See related presentations

- Avancier offers more advice in other presentations on migration planning and management