



# **Center of Excellence Workbook**

Deep-Dive Program

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## Class information

### About the Deep-dive class

The Deep-dive class is a more intensive training or workshop. It is intended for companies or partners who plan to build out a CoE in the near future. This class is meant to be delivered to a CoE building team for an organization. Along with the on-demand, self-study and Virtual instruction, the team is expected to meet frequently among itself and also with other stakeholders within the organization.

These meetings will help the team organize and make decisions around how the CoE will operate and how it will be built. The goal is to leave the training with a solid start on the recommendations and proposals the team will share with stakeholders.

For this reason, the Deep Dive sessions need to be custom scheduled to allow time for these meetings to happen. The schedule accounts for about 12 Virtual Instructor Led Training (VILT) sessions but they could end up being spread out over 3-4 weeks in order to get all of the necessary meetings held.

There is no one size fits all CoE solution. For this reason, nothing shared in this training is required, it is all suggestions, examples and what we have found works for some of our customers. If you move forward with building a CoE solution you will find that it needs to be customized for your organization. Our goal is to provide you with the information and structure to help you make those custom decisions.

### How to use this workbook

This workbook was developed to help guide you through the process. At the end of each VILT session your instructor will assign you a section or sections of the workbook to complete before the next session. These sections might include some basic information to review, short tasks like reading articles on the Anaplan Community, journaling and organizing your thoughts, or having meetings with the CoE build team or other company stakeholders.

*If you are also assigned an on-demand module review that before completing the workbook assignment.*

You will be taking notes and recording your thoughts and ideas so we recommend you keep these in a separate place. Your note taking method is up to you. Some participants like to have a simple dedicated notebook while others prefer to work with a software program like OneNote, Evernote, Box Notes or Microsoft Word.

## Section 1: Governance and Ownership

### Key terms

Term	Definition
<b>Governance</b>	The establishment of process and/or policies and the monitoring of their proper implementation. These might include workflow, best practices, naming conventions, and hierarchies.
<b>Ownership</b>	Group with the responsibility of building and maintaining individual Anaplan models.
<b>Eco-system</b>	The entirety of the organization's system of processes and technical platforms that Anaplan interacts with.

### Additional Information

For this section we suggest the build team individually write down their thoughts around each item for consideration below before meeting as a whole to discuss. This allows everyone to think through the different possibilities without being influenced by each other.

### Items for consideration

*(Review these items and jot down a thought about each in your notes)*

- In general terms, what should your CoE team be responsible for? i.e. Governance items
  - It could help to think about how you are going to handle ownership and work from there
  - Which Anaplan platform related processes, procedures or policies will the group enforce?
  - What general build standards will they oversee?
  - How will the group be involved in the implementation of new model builds or new use cases?
  - How will the group be involved in maintenance of existing models?
  - What is the group's responsibilities around the data hub?
  - Are there any responsibilities you see being farmed out to a partner resource?
- Considering the pros and cons discussed in the on-demand module, what might be the best way for your organization to approach ownership?
  - What are potential roadblocks to your ownership choice and how can you remove them?
  - How will this method of ownership impact the CoE's responsibilities?
  - How does this method of ownership impact personnel decisions?

### Meetings to have

The CoE build team should meet to discuss everyone's thoughts on the consideration items.

Can you reach a consensus for a recommendation?

If yes, make some notes:

- Why do you agree on these approaches?
- Who else might you need to meet with to discuss any possible roadblocks?
- Eventually which team(s) or individual(s) will you need buy-in from?

If no, what is your plan:

- What additional information do you need and how are you are going to get it?
- Are there others who you need additional input or information from?
- Set a deadline on making this decision

Remember this is just a recommendation at this point. As we go through this class it is OK if the group decides to change direction. However, this will give us a starting point for future discussions!

## Section 2: The Governing Body

### Key terms

Term	Definition
<b>Governing Body</b>	A group which provides direction, sets priorities and builds an overall strategy for the use of the Anaplan platform within the organization.
<b>Executive Sponsor</b>	The link between the strategic objectives of the organization and the CoE team. In other words, they ultimately decide on the overall direction and vision of how Anaplan is used.
<b>Business Sponsor</b>	Owns the Anaplan budget, Responsible for global delivery and are usually a beneficiary of the project as well.
<b>Business Lead</b>	The head of a specific department or business area of an organization. They become involved when there is a desire for Anaplan to be used within this business area either through expansion of an existing model or building a new one.
<b>Project Management Office</b>	A group within some organizations dedicated to planning and running projects.
<b>Project Manager</b>	Individuals with the responsibility of the planning, procurement and execution of a project, in any undertaking that has a defined scope, defined start and a defined finish.
<b>CoE Lead</b>	Manager of the CoE. As it applies to the Governing Body their role is to help the group understand timelines, resource needs, project benefits and identify potential project roadblocks.

### Additional Information

For classification, it is important to differentiate between the Governing Body and Governance. The Governing Body is a group that provides the direction of the CoE and it's projects. Governance is what the CoE oversees within the scope of the Anaplan eco-system.

### Items for consideration

*(Review these items and jot down a thought about each in your notes)*

1. What other roles might you want to include on the Governing Body?
2. Generally, the Governing Body sets priorities for new model builds. Do you see this as being different in your organization?
  - If yes, what do you think the project prioritization process looks like for you?
3. How do you see the Governing Body being involved in the CoE team build?

4. Which individuals or departments are you recommending be on the Governing Body?
  - Who do you need to talk with to finalize membership?
5. Unless you are finalizing a plan it might be better to think in terms of acquiring time commitments from departments instead of specific individuals.

## Meetings to have

The CoE build team should meet and discuss the Governing Body and the consideration items.

Can you reach a consensus for a recommendation?

If yes, make some notes:

- Why do you agree on these individuals/departments?
- Who else might you need to meet with to discuss any possible roadblocks?
- Eventually which team(s) or individual(s) will you need buy-in from?

If no, what is your plan:

- What additional information do you need and how are you are going to get it?
- Are there others who you need additional input or information from?
- Set a deadline on making this decision

## Section 3: Support Management, Maintenance and Enhancements

### Key terms

Term	Definition
<b>Support Management</b>	The process of fixing errors and bugs.
<b>Maintenance</b>	Changes needed to keep the system running correctly as defined by the original criteria.
<b>Enhancement</b>	Changes to the original plan that occur due to optimization or changes in existing processes or procedures.
<b>Workflow</b>	The process a request goes through for evaluation, prioritization and execution.
<b>Service Level Agreement (SLA)</b>	A set of response time standards of how long it should take for the people who identify an issue to be responded to, along with goals for minimum and maximum resolution time

### Additional Information

Something is considered a fix when it no longer meets the acceptance criteria of the original user story. If the acceptance criteria has changed it would be considered an enhancement.

### Items for consideration

*(Review these items and jot down a thought about each in your notes)*

1. Review the Severity/SLA chart (Image 1 below). Will it work for your organization?

If no, how would you recommend changing?

2. Is there a support management structure within your organization you might be able to leverage for the Anaplan system?

Does your org's IT support group have an SLA you could review and maybe use as a baseline?

3. Create a draft of a possible support management workflow.
  - For discussion only, this is not final
  - You can use image 2 below as a reference, it is the same one as laid out in the on-demand
4. Create a draft of a possible workflow for change/enhancement requests (for discussion only, this is not final).

- For discussion only, this is not final
- You can use image 3 below as a reference, it is the same one as laid out in the on-demand

## Meetings to have

The CoE build team should meet and discuss the consideration items.

Can you reach a consensus for a recommendation on each item?

If yes, make some notes:

- Who else might you need to meet with to discuss any possible roadblocks?
- Eventually which team(s) or individual(s) will you need buy-in from?

If no, what is your plan:

- What additional information do you need and how are you are going to get it?
- Are there others who you need additional input or information from?
- Set a deadline on making this decision

## Resources

Image 1

Severity	Definition	Response Time	Min Resolution Time	Max Resolution Time
Critical (1)	Critical production issue that severely impacts your use of the service. The situation halts your business operations and no procedural workaround exists.	30 Mins	2 Hours	4 Hours
Major (2)	Major functionality is impacted or significant performance degradation is experienced. The situation is causing a high impact to portions of your business operations and no reasonable workaround exists.	2 Hours	4 Hours	12 Hours
Minor (3)	There is a partial, non-critical loss of use of the service with a medium-to-low impact on your business, but your business continues to function. Short-term workaround is available, but not scalable.	8 Hours	12 Hours	24 Hours
Cosmetic (4)	Inquiry regarding a routine technical issue; information requested on application capabilities, navigation, installation or configuration; bug affecting a small number of users. Acceptable workaround available.	12 Hours	24 Hours	40 Hours

Image 2

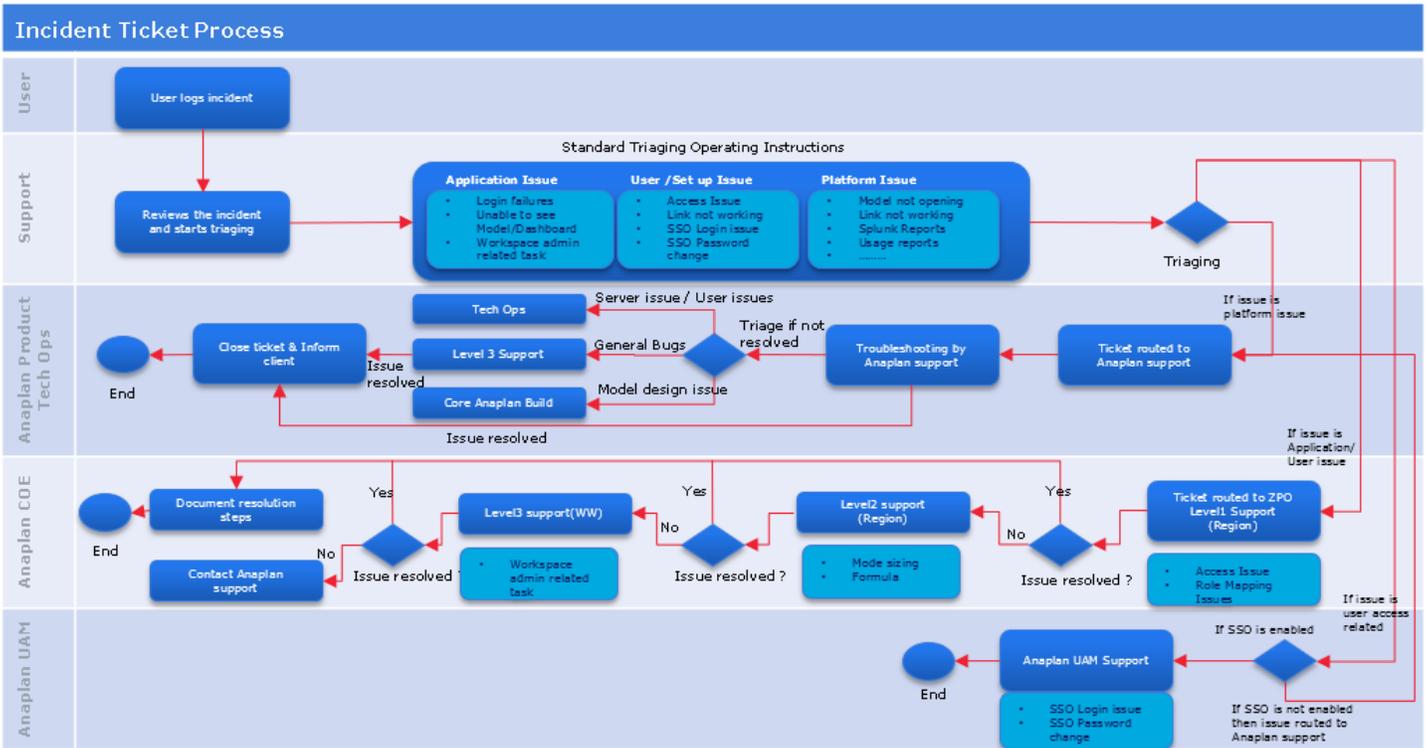
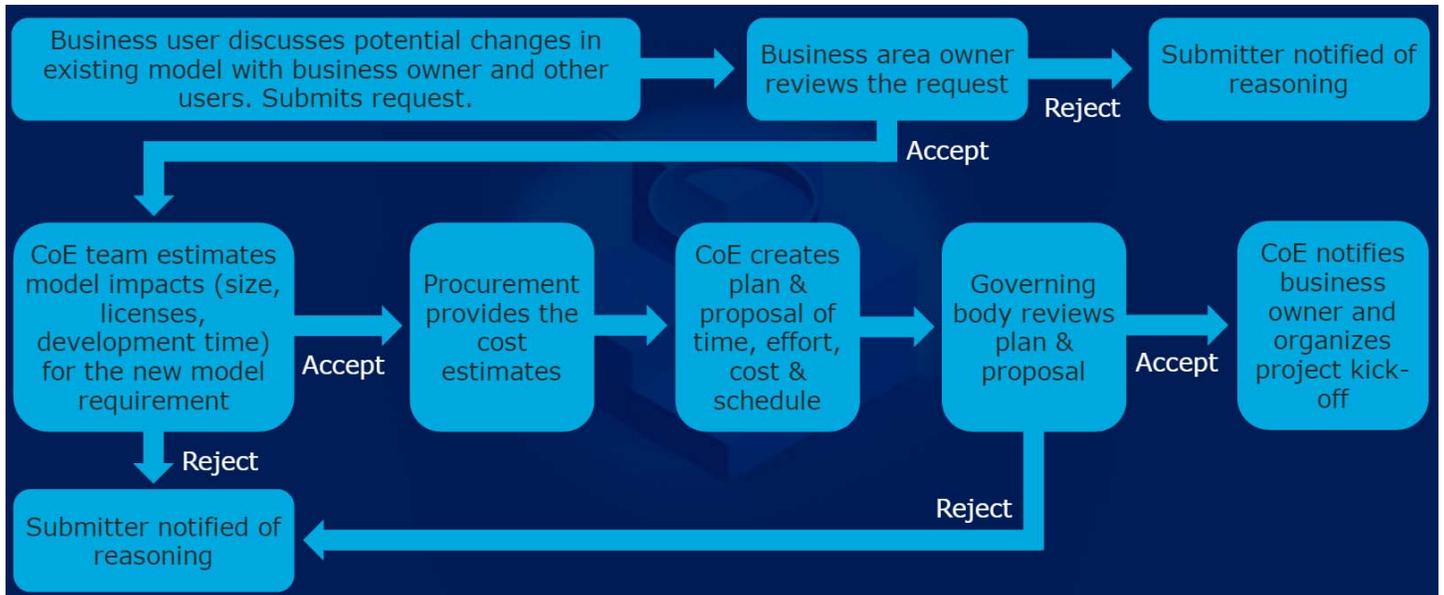


Image 3



## Section 4: New Model Requests

### Key terms

Term	Definition
<b>Business Area</b>	A group, region, division within an organization that has its own need or use case for the Anaplan platform.

### Additional Information

In this section we are only discussing the request process. If a project is approved a new build project process needs to be determined. This process will be based on what levels of involvement the CoE has in the actual implementation of a new model and will probably be one of the CoE group's first projects as a team.

This section mentions two new roles, model builders and solution architects. These will be further defined in the next section, for right now you only need to understand that these roles are active in the design and building of new models.

### Items for consideration

*(Review these items and jot down a thought about each in your notes)*

- Draft a workflow for a new model request.
  - For discussion only, this is not final
  - If desired, you can use the example in the on-demand (image 4 below) as a starting point
- Would you recommend the CoE project manages new builds or is there a project management office (PMO) within your organization you might be able to leverage for new builds?
  - If CoE managed, will you recommend adding a project manager role to the CoE?
  - If you want to use a PMO, who would you need to work with to accomplish that?

### Meetings to have

The CoE build team should meet and discuss the consideration items.

Can you reach a consensus for a recommendation on each item?

If yes, make some notes:

- Who else might you need to meet with to discuss any possible roadblocks?
- Eventually which team(s) or individual(s) will you need buy-in from?

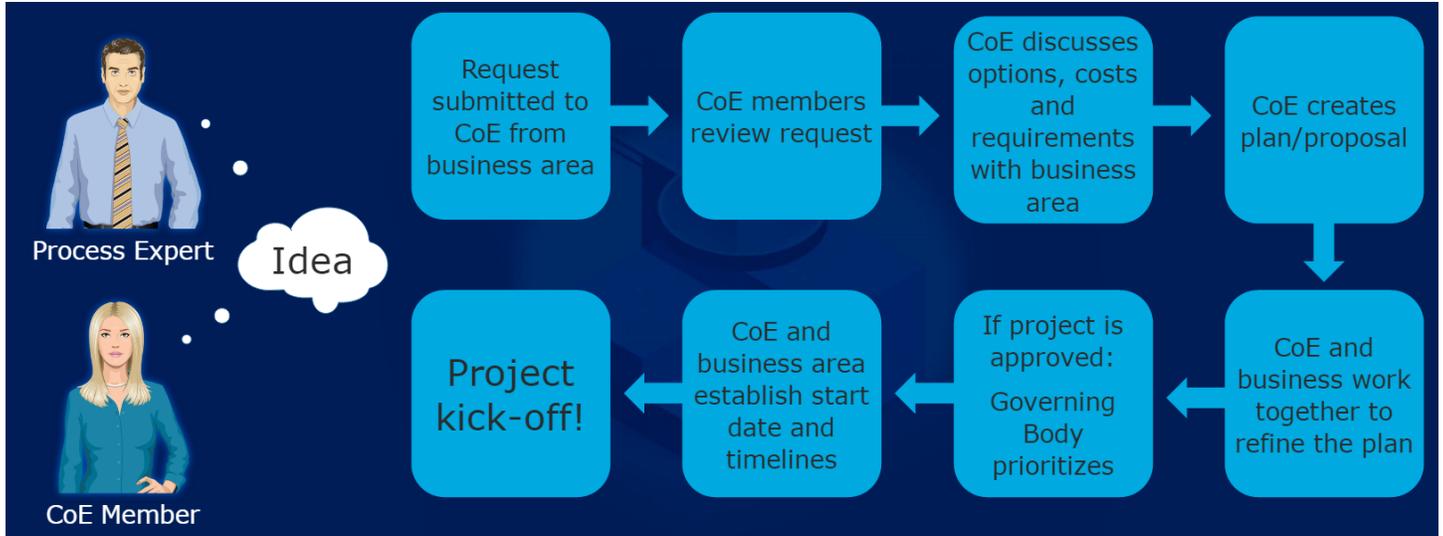
If no, what is your plan:

- What additional information do you need and how are you are going to get it?
- Are there others who you need additional input or information from?

- Set a deadline on making this decision

## Resources

Image 4



## Section 5: Team Roles and Structure

### Key terms

Term	Definition
<b>CoE Lead</b>	Manages the team, partners with other business units and sets much of the direction of the team
<b>Solution Architect</b>	Is fluent in Anaplan as well as other systems in the organization. Uses that knowledge during the model design process.
<b>Model Builder</b>	The people that build the models as designed by a solution architect
<b>Project Manager</b>	Keeps the team's projects and tasks organized.
<b>Quality Assurance</b>	Responsible for testing model fixes, enhancements and new builds.

### Additional Information

Note that during this section we refer to team structure which is the make up of the team. We also refer to model structure which is how an Anaplan model is structured and designed.

Realize that the FTE estimates are merely examples and not hard and fast guidelines. They are meant to spark thought as opposed to providing answers. Use them as baseline discussion points. Realize that the FTE estimates are one area you will probably not be able to settle on at this point.

### Items for consideration

*(Review these items and jot down a thought about each in your notes)*

1. Looking at the examples provided in the on-demand training which team structure is closest to what you envision? Images 5-7
2. Generally speaking what roles do you envision the CoE team needing at the start?
3. What might be the growth process in the 12 months after it is established?
4. Do you think leveraging a partner might be something to look into?
  - For what functions would you leverage a partner?
  - How long would you hope to leverage a partner? I.e would you eventually transition the responsibilities back to the internal CoE?
5. Are any of the FTE estimates applicable to your organization? Why or why not?

### Meetings to have

The CoE build team should meet and discuss the consideration items.

1. Can you reach a consensus for a recommendation on each item?

If yes, make some notes:

- Who else might you need to meet with to discuss any possible roadblocks?
- Eventually which team(s) or individual(s) will you need buy-in from?

If no, what is your plan:

- What additional information do you need and how are you are going to get it?
- Are there others who you need additional input or information from?
- Set a deadline on making this decision

2. Can the build team gather this information for later use?

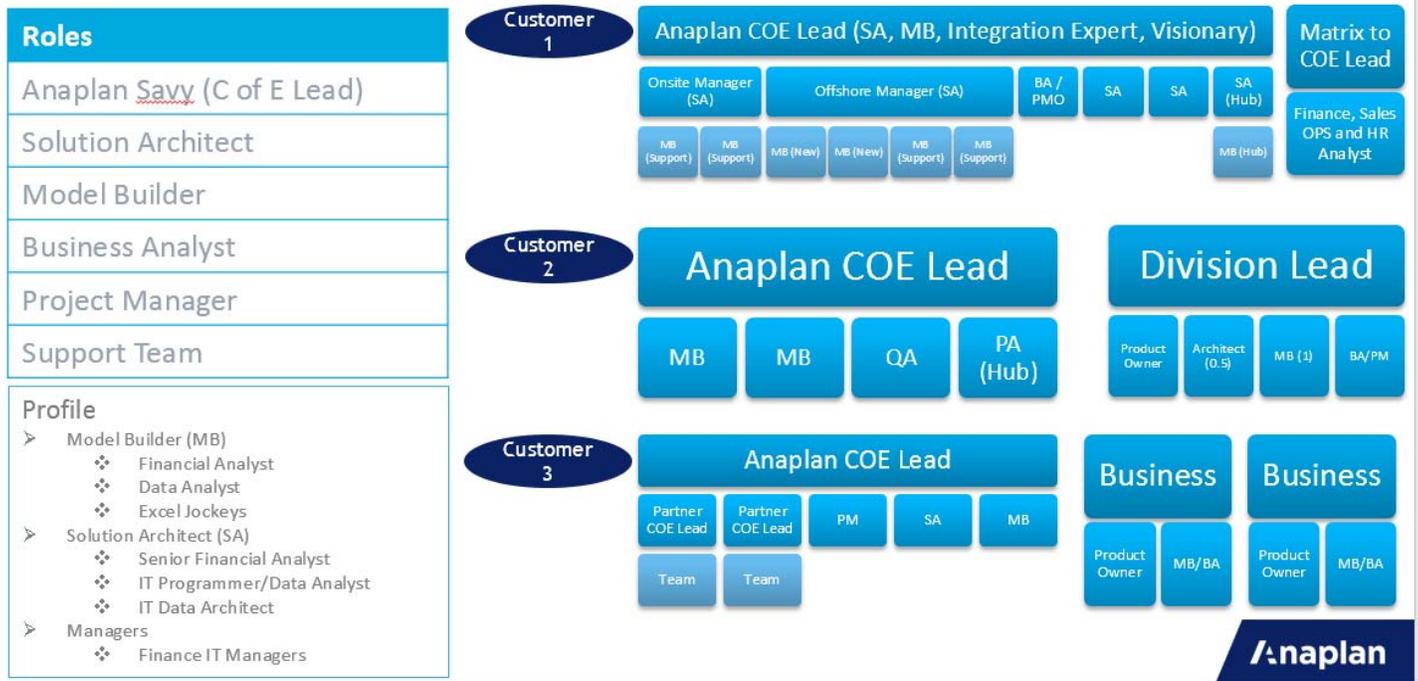
- Assuming you have an existing model rolled out, what FTE demands are currently being placed on your resources?
- Work with the current project team to estimate FTE use internal and externally billed
- Can you use these numbers to plan the new CoE's FTE needs?
- Setup meetings with the group or individuals who might be able to answer these questions

Resources

Image 5-7

This is a temp image until I create the on-demand images to put here.

# 1. Team Structure



## Section 6: Filling Team Roles

### Key terms

Term	Definition

### Additional Information

Options abound for filling team roles. You can build internally, hire externally or utilize a partner.

### Items for consideration

*(Review these items and jot down a thought about each in your notes)*

1. Developing resources internally may take more time but could improve job satisfaction and retention
2. Anaplan training has a series of courses that can get employees up to speed
3. Utilizing external partners is probably the quickest way to get up and running but may cost the most

### Meetings to have

Review the team structure and roles you are considering.

- Who internally might be able to fill those roles?
- What steps would need to be taken to move those people into those roles? For example:
  - Establish interest/desire on the individual's part
  - Organization permissions to offer role or other organizational requirements for recruiting from within
  - Back filling individual's current role
  - Talking with individual's current leader to gain permission
- Where there is a desire to grow internally what training might need to be done?
- Identify roles that can't/won't be filled internally.
  - How with these roles be addressed (hiring from outside, contractors, partners, internships, etc)?
- Formulate an over-all plan for filling the CoE roles.

## Section 7: Data Governance

### Key terms

Term	Definition
<b>Data Hub</b>	A standalone Anaplan Model that gathers data and pushes it out to other planning models for use.
<b>Sparsity</b>	Unnecessary data contained within a model that can slow performance.

### Additional Information

More information on what constitutes good, clean data can be found in community by searching for “four cornerstones” and selecting **Data**.

### Items for consideration

*(Review these items and jot down a thought about each in your notes)*

1. Does your current Anaplan ecosystem have a data hub?
2. Identify where the data in your current model(s) comes from? (which systems)
3. Can the current data be considered a source of truth?
4. If a data hub needs to be built do you also need to verify the data before it is sent down stream?
5. What type of data analysis might you need to add to your new model request process when factoring in the data hub?

### Meetings to have

This is going to vary depending on if you already have a data hub or if you will need to build one.

If you have a hub, many of these factors should have already been considered. A meeting with the hub architect to help you understand the way it is built and how new data can be added is recommended.

If you don't have a hub it is strongly recommended to build one eventually. This should be factored in to the planning process once the CoE is in place. This could even be their first project and a way to work through their new processes.

## Section 8: Putting it all together

### Final activity

As a CoE build team you should now have enough information to start creating a plan for your CoE build. Get together as a team and talk through your notes from each area of the workbook. Schedule a meeting to develop an action plan, or if you feel far enough along a proposal. There is a lot that goes into building a CoE so use the checklists at the end of this module to make sure you account for everything.

Once the plan has been developed schedule a follow-up meeting with your instructor to walk through the plan/proposal. They can be a fresh set of eyes and help you identify items you might need more information on before moving forward.

### Items for consideration

1. Identify the individuals/groups you will ultimately need final buy-in from on a CoE build. Brainstorm about what each individual or group will really be interested in knowing.
2. Settle on the role of the CoE
3. Make a list of any information identified as being needed and assign the people responsible for gathering it.
4. Make a list of the different people and groups you will need to meet with along with the topics you need to discuss with them.
5. Create a proposal document, PowerPoint presentation or both to help communicate:
  - The benefit of the CoE
  - Proposed structure and responsibilities of the CoE
  - Potential roadblocks in the build process
  - Timelines and milestones

## Section 9: Checklists and Reminders

### Additional Information

Here are a few generic checklists and reminders you can review during the build process. These are meant as things to jog your memory. You may or may not find them relevant to your particular CoE build but it's still a good idea to review them to see if you are missing anything.

### Architecture Guidance

Hub Spoke Architecture
Hub Architecture Best Practices
Distributed Model Guidelines
Core, Workspace Distribution
Optimized Model Structure
ALM
Integration Guidance
Model Size Estimator
SIPOC (Source, Input, Process, Output, Customer) Frame Work
KDD (Key Design Decision)

### Model Building Standards

Naming Conventions <ul style="list-style-type: none"> <li>• List</li> <li>• Module</li> <li>• Actions</li> <li>• Dashboards</li> </ul>
Report Naming Conventions for Distributed Model (Use Numbers)
SIPOC (Source, Input, Process, Output, Customer) for every Model
Business Rules Consolidated in Single Module (Use subsidiary view)

Boolean filtered view for Model to Model Import or Action Import/Export

## Project Governance

Change Requests
Enhancement Requests
New Feature Requests
New Application Requests
User Management

## Application Support

Platform Issue
Functionality Issue
Support Ticket Triage
Support Management

## Scale

Regular communication
Alignment to corporate strategy
Internal career paths
Leverage Anaplan training
Develop documentation
Early Adopter program
Share best practices