Tactical (yet Strategic) EA – Keeping Both Sides Happy

We say it all the time, but the bottom line is it's the truth – we don't have enough time! As EA practitioners, we are always faced with the conflicting pressure to produce results now, while maintaining our focus on the strategic nature and future state target of the enterprise as a whole. This is particularly true of EA programs that are still trying to gain credibility and momentum.

Many of us have worked in environments where the pressure to do things immediately supersedes strategic or future-oriented work. While not the ideal, this is a very common situation that many enterprise architects experience. In order to maintain an EA Program at all in this situation you must consider engaging in some tactical activities, usually aimed at supporting one or more current implementation/integration projects, while trying to also advance the strategic nature of the EA program. While not sustainable in the long-term, these tactical efforts show the impact that the broader EA perspective can have on the delivery of projects.

For EA tactical activities to have strategic impact, the EA team should establish a set of future requirements based on strategic direction (called common requirements vision by some), establish a set of global principles to guide consistency across multiple decisions, and conduct trends analysis for both information technology and the business industry in which the enterprise is involved. These activities will provide a basic set of futures against which you can compare current tactical efforts.

In order to be more tactical, enterprise architects must look at the project, technology and application portfolios and identify opportunities to advance the current tactical activities related to these portfolios.

Project Portfolio Evaluation

The most visible activities are usually happening in implementation/integration projects, so the first area to focus your tactical attention on is the project portfolio. Avoid interference with projects that are well into the detailed design phase or beyond (construction, testing, rollout), and instead evaluate the early phase projects to identify those that fit one of three profiles: Look for those that are

1) Making a major investment in new technology that has not previously been used in the enterprise
2) Implementing functionality that is similar (doesn't have to be exact) to that of other projects
3) Implementing functionality that can easily be extended to include requirements that have been derived from strategy, such as in a common requirements vision exercise

The tactical objective in all of these cases is to help the project fulfill their goals, exchanging the time and expertise of EA resources for an extension of the project requirements, budget or schedule to fulfill the following:

1) Apply the principles and enterprise perspective of EA to the task of selecting technology that will not only satisfy the needs of the current project, but also be adaptive and potentially meet the needs of other ongoing or impending efforts
2) Guide the efforts of two or more projects to modify their designs so that shared functionality can be built that will adequately (not necessarily optimally) meet the needs of multiple applications, including potential future applications
3) Guide the efforts of a project to extend its design to include strategic requirements that may not be needed immediately, but are projected as future needs based on strategic direction

In all cases, the outcomes of all of these efforts should be documented and included as part of the future state EA. Be sure to document the benefits, especially any time and money savings, that result from the involvement of EA resources with the project team. These will help in building the case for the EA effort to become more applicable to a broad set of projects, rather than just those that the EA team identifies as benefiting from their assistance.

Technology Portfolio Evaluation

A typical tactic related to the technology portfolio is collecting so-called "existing or de-facto standards." However, since in many cases, the standards are not actually documented, enforced or even understood, let's call them "previous technology choices." These previous technology choices have been made by projects and/or different infrastructure-oriented groups within the enterprise. While many of them are derived from the immediate circumstances leading to their selection, they can also be leveraged in other areas of the company that may not be aware of them. Follow these steps to quickly and tactically leverage some of these previous technology choices:

- Begin documenting the major technologies being used within your technology domains (database, network, middleware, platform, collaborative, etc.)
- Identify the dependencies (other required technologies) and the applications that utilize these technologies, using a spreadsheet, database or EA repository tool. These relationships must be known in order to do any significant analysis of the long-term leveragability of previous technology choices
- Compare previous technology choices against the requirements, principles, and trends analysis conducted earlier to verify those that are compatible with probable EA future direction.

The tactical impact of this activity is achieved by publishing those that pass this litmus test, including the project, application or other teams of people using them so that others know where to get practical experience from.

Application Portfolio Evaluation

Once a baseline set of technology standards has been established, either formally through a forward-looking, strategic EA effort or through a tactical approach applied to the technology portfolio, attention can be turned to the application portfolio. The goal of the tactical application portfolio evaluation is to assess the current state of existing applications relative to business value and technology foundation. This will be a relative, qualitative assessment using whatever information you have gathered through earlier EA activities as a basis for business value and technology foundation.   For instance, you could use the strategic requirements as a basis for business value, and the previous technology choices that passed the litmus test as the basis for technology foundation. You can have 4 general outcomes from this evaluation:

- **Low Business Value, Weak Technology Foundation** - These applications are candidates to be replaced. Do not focus tactical attention on these, unless the project portfolio contains work to replace them.
- **Low Business Value, Strong Technology Foundation** - These applications are usually examples of applications that have been implemented fairly recently with adaptive designs and technology usage. Focus attention on identifying reusable components and services, and then look for other applications that can reuse them.
- **High Business Value, Weak Technology Foundation** - These applications are likely to have many entries in the project portfolio, and likewise, will have the focus of EA tactical attention. The tactical attention from EA will be getting these applications' project teams to design in future requirements and use preferred previous technology choices and reuse components and services from other applications.
- **High Business Value, Strong Technology Foundation** - These applications likely will not demand tactical attention from EA other than to identify other applications that can benefit from the reusable components and services and technology foundation of these applications.

Conclusion

Once these evaluations have been conducted, the cycle can and should begin again. The technology and application portfolio evaluations likely resulted in ideas and recommendations that can then be reflected in changes/additions to entries in the project portfolio.

Tactical Focus & Strategic Benefits

Tactical Checklist

- ✓ Assist project teams in major technology selections
- ✓ Assist project teams with incorporating reusable components and services within their design
- ✓ Identify previous technology choices that can be applied in other areas of the enterprise
- ✓ Identify reusable components and services and opportunities to reuse them within the application portfolio

Strategic Outcomes

- ➤ Increase reuse and reusability of business and technology components and services
- ➤ Increase the leveragability of previous technology choices across the enterprise
- ➤ Initiate or add to the EA repository
- ➤ Increase the business value and strategic contributions of the project, technology and application portfolio
- ➤ Increase the credibility and effectiveness of the EA team

Directions: The key to having strategic outcomes from EA tactical activities is to make sure that the EA resources create a future-oriented, strategic baseline as a basis of comparison for tactical decisions, and maintain a broad enterprise perspective when working with an individual project, technology domain or project.

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