Tale of the Phoenix – Creating a Center of Excellence in an Unfriendly Environment

BAWORLD WINNIPEG, MB, October 7th – 9th, 2015

Hans Eckman | HansEckman.com
@HansEckman | #BAOT | @PROJECTSUMMIT #BAWWIN

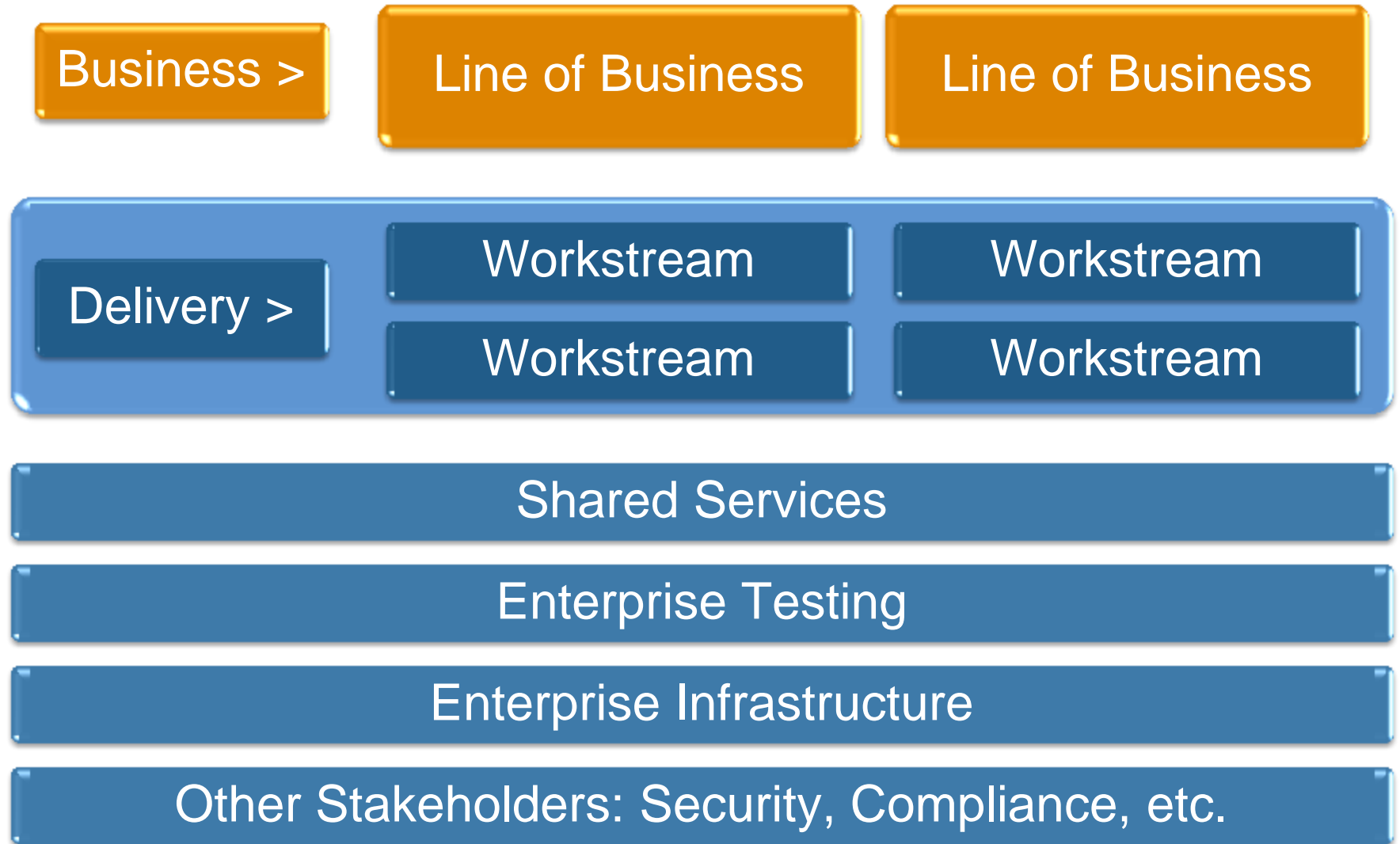How can we help you shine?

SUNTRUST

Ground Rules

- This session is for you, so please participate.

- Interrupt me for clarifications.

- The content in this presentation is the responsibility of Hans Eckman, and does not express the views or opinions of SunTrust Bank.

- No animals were harmed during the creation of this presentation. Please support your local pet rescue groups.

SUNTRUST

Overview of Organizational Structure

| Business > | Line of Business | Line of Business |

| Delivery > | Workstream | Workstream |
| | Workstream | Workstream |

Shared Services

Enterprise Testing

Enterprise Infrastructure

Other Stakeholders: Security, Compliance, etc.

SUNTRUST

Background

- COE was only focused within IT Delivery Services

- Enterprise Delivery Services was a matrixed organization

  – Professional Development Managers: Role management

  – Project Management Office: Project delivery standards, processes, support and governance

  – Workstreams: Dedicated teams supporting LOB software needs.

- Two models for Center of Excellence (COE) or Community of Practice (COP)

  – COE: Advocacy group of leaders promoting best practices

  – COP: Overall framework for excellence for all team members

SUNTRUST

Setting the Stage for a COE

- Project 2010 transformed IT services and organizations

- PMO established to maintain and enforce the new SDLC, methodology and governance

- PMO responsible for process, tool and template changes

- PDMs responsible for role training and standards

- Challenges:
  – Desire to keep the momentum after Project 2010 gains
  – Mitigate changes that negatively impacted roles and projects

SUNTRUST

If you volunteer, work will come

- Three people were actively worked to improve the BA role
  - Kim Miklandric: PDM support and BA training manager
  - Russ Peña: PMO competency center and end user support
  - Hans Eckman: Practitioner, tool breaker and mentor

- Team started meeting to discuss changes impacting the BA role, and volunteered to drive changes

- Researched COE structures and best practices

- Proposed formalizing the group as a COE
  Shot down! Group and function rejected

SunTrust

Continuing as Process Action Team

- Since the COE name had emotional baggage, team continued work as a Process Action Team

- Reached out to other teams, sponsoring cross-functional improvements

- Updated BA templates and guidance in the SDLC

- Provided best practices training, mentoring and project interventions

- Acted under the principles of a COE, but without recognition or formality (fly below the radar)

SUNTRUST

BA 20/20 – Vision for the Future

- Transformed work the Process Action Team and organization needs into a vision and approach for future success

- Goal: Become a benchmark company for the BA role

- Shared vision with PDMs and PMO
  Again, shot down!

- Sponsors felt that vision and goals needed to be the platform sponsored by a COE

- Direction – Develop a formal COE, and the COE can adopt BA 20/20

SUNTRUST

Creating a COE Charter

- Co-sponsorship from PDM and PMO
  - 80% of process changes are PMO controlled, 20% PDM
  - 60% of training is PDM controlled, 40% PMO

- Timing (and patience) can be everything
  - Several reorganizations, especially impacting the PMO
  - Staffing changes in PMO and PDMs
  - Additional resources joining the PAT

- Secret of Success: Removed each obstacle
  - Single sponsorship: PDM
  - Sponsor authority
  - COE leadership

Lessons Learned

- Responsibility tipping point: People gravitate to the team that solves their problems

- Sponsorship: Validation of COE control and authority

- Must have thought leaders who are willing to work

- Identify and remove barriers (like rerouting with GPS)

- Must fill an organizational void or need

SUNTRUST

In the Years Since Then…

- CPMO transformed into an EPMO, and focus changed several times.
- PDM team dissolved and responsibilities moved to Workstream Managers.
- BA COE shifted to a BA support organization and combined with Workstream BAs under Russ Peña.
- EPMO management change and new organization.
- Russ Peña moved to new opportunities.
- BAs reclassified as Business System Analysts.
- BA COE currently serving as COP to support BA leads.

SUNTRUST

About SunTrust Banks, Inc.

SunTrust Banks, Inc., with total assets of $189 billion as of June 30, 2015, is one of the nation's largest and strongest financial holding companies.

Through its banking subsidiaries, the company provides deposit, credit, trust, and investment services to a broad range of retail, business, and institutional clients. Other subsidiaries provide mortgage banking, brokerage, investment management, equipment leasing, and capital market services. Atlanta-based SunTrust enjoys leading market positions in some of the highest growth markets in the United States and also serves clients in selected markets nationally.

The company operates approximately 1,425 retail branches and 2,150 ATMs in Alabama, Arkansas, Florida, Georgia, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia, and the District of Columbia. In addition, SunTrust provides customers with a full range of technology-based banking channels, including Internet, PC, and Automated Telephone Banking.

Stay Connected

- SunTrust Bank - www.suntrust.com
  - https://www.linkedin.com/company/suntrust-bank
  - https://twitter.com/SunTrust
  - https://www.facebook.com/suntrust
  - @SunTrust
- Diversified Communications - www.divcomevents.com
  - @projectsummit #BAWWIN
- Hans Eckman - HansEckman.com
  - Hans@HansEckman.com or hans.eckman@suntrust.com
  - http://www.linkedin.com/in/hanseckman
  - @HansEckman
- Twitter
  - #BAoT
  - #PMoT

SUNTRUST