Arkus

IT Governance In The Cloud:
Building A Solution Using Salesforce.com

**By Jason Atwood and Justin Edelstein
Co-Founders, Arkus, Inc.**

Cloud computing has the potential to create a new paradigm for IT governance. Where traditional solutions can take months or even years to make an impact on an organization, the cloud computing model allows for the rapid deployment of IT governance solutions that are far more agile, iterative and easily adaptable to the changing needs of the business. In this White Paper, the authors show how they were able to build a successful and robust IT governance platform using Salesforce.com, saving their client significant time, money and headaches while dramatically improving productivity. In addition, the White Paper provides a best-practices approach to using Salesforce.com for IT governance so that organizations can take advantage of the advanced features and functionality of the Force.com platform.

Getting Started

When we set out to build an IT governance solution for a major financial services firm, we decided at the outset that Force.com would be our platform of choice. There were several key reasons for this decision. We knew we needed a system that was robust and fully featured and we knew that the Force.com platform would fit the bill there. We also knew that our success would be measured in large part on how quickly would could deploy the solution and how much – or how little – it would cost. With Force.com we felt assured that we could move quickly without having to build hardware or order software. It turned out we were right: Once we began the project, we were able to build a proof of concept in just a matter of days and we were able to get the full system up and running in just six weeks, at a fraction of the budgeted cost.

We were fortunate that we had built other projects using Salesforce.com and the Force.com platform. Therefore, we didn't have to go through a process of evaluating various platforms. Still, before moving forward, there were a number of important steps we had to take in order to build the foundation for a successful solution. Based on our experience, here are some of the critical first steps in building a successful IT governance solution using Force.com:

- **Define What You Are Trying to Track:** You need to look at how your organization is built out, where the cost centers sit, how P+L is structured and measured, how decisions are made and a variety of other factors. What are the projects that need to be tracked and how will success – or failure – be measured? When you have that, you can then build your solution based on how your business and technology cost structures are modeled because Force.com provides a highly flexible platform.

- **Identify What You Have in Place:** Before you get too deep into Force.com you will want to whiteboard and document the process flow of how an IT project gets approved and managed within your organization. Is this a well-oiled machine or something you have to build from scratch? What are the approvals processes and how are they determined – by the size of the project, by its strategic alignment, by its department? You want to be able to identify who will be submitting and approving projects and where these individuals/groups fit in the organization.

- **Understand the Interaction Between Business and IT:** It is important to recognize from the outset that IT governance is not just about technology. When we set up the solution for the major financial services firm we were working with a number of business working groups, lines of business, internal steering committees and a wide range of business owners who were neither the technology owners nor technology experts, although they did have a responsibility to make technology work for their businesses.

- **Define Project Stages:** How are you measuring each project and what are the checkpoints? Are you measuring ROI on an ongoing basis and tracking costs? For instance, if a project is supposed to cost $1 million and it is still in the early stages and has already cost $900,000, you need to build-in checkpoints that would flag the project as a problem. With our financial services client, they had five or six ultimate goals and they wanted all IT projects to be associated with these goals.

These early steps are critical to a successful deployment using the Force.com platform. There is a lot of legwork to be done before an implementation. We put this into the category of "getting to know all of the things you don't know." In our case, we had 85 percent of the project defined before we even started with

Force.com. We knew what was going on in the company; how we could report data on our system; and how we would structure approvals so that people weren't going off and doing whatever they wanted without any controls or governance. For instance, we built in requests for change orders that would allow for prioritization that would shift if something changed the scope of a project. So if a project was costing more than expected, or was deemed less strategic, it could re-evaluated or even killed.

Building A Proof Of Concept

We chose the Force.com platform because it is flexible and cost effective and also because it is robust and fully featured. One of the real advantages is that you can build a proof of concept in a matter of days, which is exactly what we did. We were able to gather all the information from the decision-makers within the company and define the parameters of the solution and start building it right away. Then, rather than showing people abstracts and concepts, we were able to show them real processes – this is where you log in, this is where you click if you want this piece of information, these are the fields in which project cost and strategic alignment figures are located.

Most people who are not software engineers can't visualize software. So when you talk about things like workflows or fields or approval processes, they can't visualize what you are talking about. With the Force.com platform you can start to show the solution and get immediate feedback. At Arkus, we believe in an Agile methodology and the Force.com platform enables this. The platform allows you to maneuver quickly so you can generate excitement about the project, while enabling faster decision-making and improved documentation.

As a best practice in building an IT governance solution in Force.com, we believe it is necessary to build a proof of concept and get it in front of real people quickly. We were able to do it in two days. It's a real advantage to show people how something works and also to come to grips with any limitations so you can move beyond them. With a proof of concept, you can get real solutions in front of end users and IT folks and quickly show off functionality. It generates enthusiasm and helps to get buy-in across the organization.

To build out a successful proof of concept in Force.com, you should sit down with the business people and create a strawman solution with enough functionality to show how it will really work. You want to show off features like field validations and auditing. You can show what fields are available and how you will track the things that are most important about each project. You can show the visibility model for the data – who gets to see what, and when. You can show workflows, systems notifications and approval processes. With Force.com you can show how each step is documented. It's a little thing, but users can hit an e-mail reply and send an approval using Force.com. This is one of the things people take as a big win because they can approve projects wherever they are and reduce the lead time involved in approving and ultimately deploying a project.

You want to bake some of these features into the proof of concept so you can show what the system can do. It also helps in ferreting out other requirements for the system. People have it in front of them and say, "Oh, can I do that?" Usually, the answer is yes.

Another best practice is to work with the organization to determine what is the desired end result of the solution. What are the priorities, what factors will determine a successful project and what will define a successful result? When you talk to users and IT in this manner, it generates a lot of good ideas on how to think about data sets and how to architect the overall solution.

Building A Pilot

One of the big advantages of using the Force.com in building the proof of concept is that you are developing it on the live system using simple objects, with the option of using VisualForce and APEX if you eventually want to customize your solution. Using simple configuration means you can rapidly show progress, build something, get immediate feedback and do immediate iterations.

Once you've done the proof of concept, you are ready to start building out your solution. You want to incorporate the feedback you've received and then build in all of the functionality. We believe it is a best practice to have frequent check-ins and re-looks at the project: With Force.com you can look at progress every couple of days if you want, depending upon the scope of the project. We did updates every couple of days to once a week at the financial services firm. By working with solutions every few days, you can iterate and fine-tune it until you are at the point where you can pilot it.

At that point, you can test all of your functions and start to define the pilot: Who will be in it, what they have to do to be in it, how will they test it and upload data, will it be a full production pilot, etc. You will want to set up metrics to monitor how the pilot is being deployed and what will determine its success. It is important to set up processes to capture feedback and build that feedback back into the platform. The Force.com platform provides many alternatives for feedback, such as conference calls, surveys and Ideas, which is a feature that is particularly valuable for collecting feedback and new feature requests.

The pilot will also give you an understanding of what you need to do in terms of training and data migrations so that you can move from testing to full production. In the case of the financial services institution, we piloted the project for one week and, by Monday and Tuesday of the following week, we were giving out user names and passwords so that people could use the production system. And that's how it was launched. When we did launch, we made sure to put in solid feedback mechanisms. Any good system should be constantly changing and getting better. We believe it is a best practice to take small bites as you move down the project path and not try to do too much at once.

Using Salesforce.com and the Force.com Platform

In building the solution for IT governance we realized there were significant advantages in utilizing Force.com as the platform, compared to traditional on-premise methods as well as versus other cloud computing solutions. First of all, the cost of using Salesforce.com and the Force.com platform was a fraction of what it would have been if we had to purchase hardware or license new software. We were able to get the solution up with much less initial investment than planned, and we were also able to save significantly on the total cost of ownership. In fact, we were able to replace an already existing, yet failing, system built on Microsoft SharePoint. Nobody used the SharePoint solution, therefore there was no ROI measurement and absolutely no visibility into any of the established IT governance processes.

The other obvious advantages of using Force.com were the ability to get the solution up quickly and to iterate it often so that it was constantly improving and addressing the needs of users. The Force.com platform enabled us to get something in front of users within just a couple of days after talking to them, so they could see and feel the solution and make adjustments and suggestions on the fly. Being agile is so important in business today: That is one of the key benefits of using Force.com for any IT solution, and in particular for IT governance.

We found that the feedback mechanisms, combined with the highly malleable platform, helped to create a buzz about our project. Sometimes we would be showing something to a group of users, someone would make a suggestion and we would just make the change immediately, right in front of them, which may not be great governance but we were able to be flexible with the solution. They would always be amazed – it's so different from what they have come to expect in software development.

Another advantage to using Force.com is that the platform itself is always moving forward and taking advantage of the latest technology solutions. With Chatter, for example, you can use social networking tools to gather feedback and post updates and get a real feel for how people are using and responding to the solution. Chatter enables some innovative methods that can be utilized in managing a process flow, and it is unique to this particular platform. As requests move through different tiers of the business process, the request itself can send a message to users' Chatter Feeds, making collaboration and communication more open than ever. We've also found that once you have developed one project using Salesforce.com it is much easier to roll out the next project and even easier to roll out the one after that. The general look and feel is the same for each, so you have a real advantage moving forward when developing additional cloud-based solutions for other areas of the business.

Turning To the Cloud

Using Salesforce.com and the Force.com platform for IT governance gives you a broad look at the IT portfolio for the entire organization, meaning it is much easier to identify other applications or processes that would benefit from a cloud-based, Force.com solution. Cloud computing is clearly a major transition for the delivery of IT solutions: Within three years, Gartner predicts the worldwide market for cloud services will reach nearly $150 billion. By building and deploying a cloud-based solution for IT governance in Salesforce.com on the Force.com platform – and by following the best practices outlined here – your organization can safely and successfully turn to the cloud to deliver lower costs, higher productivity and IT solutions that are more closely integrated into your overall business strategy. In the end, that's what IT governance is all about.

Jason Atwood, COO, Arkus Inc.

Justin Edelstein, CIO, Arkus Inc.

About the Authors

Jason Atwood and Justin Edelstein are co-founders of Arkus, a leading supplier of cloud computing services and solutions based in NewYork City. Arkus's Agile methodology is a successful and proven process using iterative design to enhance user adoption and ROI for cloud computing initiatives.