(5) Answered! The Perfect COE Operating Model: Federated or Centralized? -

Transcript:

(00:00) [Music] all right Gabe we're going to get to the bottom of this we're getting to the bottom of this I want to finally finally I want to hear the resolution to the debate of what's better for your Coe operating model should it be Federated should it be centralized should it be a hybrid should it be something in between we're joined by Matt who's going to that's a lot of options yeah who's going to unlock this for us you have one choice one choice if you had the world is waiting I'm going to I'm going to

(00:29) answer it from the perspective of my current role as a Coe manager yeah I very much like the Federated model that I currently use okay um but I had the luxury of inheriting a very strong Coe when I took the role that was there from the start there was one Federated crew and the Coe simultaneously so so we had one group right we had the standards in place and built everything proof of proof of concept proved automation anywh it's capability at the very beginning and then and took that story and started adding additional teams on following

(01:04) what we were setting up um if I want to change that answer and go as the what the developer would be I wish I could just build stuff myself instead of dealing with all the hurdles but I think you lose a lot of a lot of focus on what you should be building and where you should be building it um one of the things I'm I'm proud of with our Federated model is that even the smallest line of business with one developer is able to build stuff rather than what I've heard in stories where there's a centralized Coe they're

(01:30) building the big fish the biggest area of their organization gets attention and the rest of the the organization gets nothing tell me tell me a little bit more about the standardization because I think that's a key to the success here yeah you you mentioned that and you said that there was already standards in place for onboarding what was your one Factory or your one Federated group and I think that's the real important to having success in a Federated model you need to have standards for the way that your automations are developed the

(01:59) way that they're named the way that you're doing testing the way that you're doing documentation talk to me about that process of going from one to now many Federated teams and what was that Federated onboarding process like how has it changed what did you learn along the way so um that we'll get to that last question we were by no means perfect at the beginning but we had it so that when that first crew was in anything that they wanted to build was vetted by the Coe we had a strategy arm in the Coe that looked at what people

(02:31) wanted to build helped them figure out the ROI helped them figure out like the basic things um again we do it a lot differently now but at the beginning when we thought that counting number of bots and potential Roi and number of you know executions the simple things that everyone starts with we at least had a model that they had to follow and we had them set up dedicated funding for a crew so we knew that they were going to be there for the Long Haul we weren't going to run into orphan Bots um we knew that

(02:57) they had dedicated product owners that would sit within from the business in the Federated tech crew and we' had a strategist person aligned directly to those teams as well so we had the trifecta we we had it so that no decision was really made to go forward with automation without everyone weighing in on whether it was going to be worth it that's cool and then once they started building we treated it as a full Tech build so we had uh Enterprise change management involved Enterprise risk groups that they understood um from

(03:25) the very beginning here's what a bot does here's where its failure points can be um at the time we were building incredibly lowrisk things if they didn't run okay the humans will do it like that was our that was our fail we didn't really have to worry but as we as we matured and we started putting things customer facing or uh something that's running every 5 minutes to make sure that the bank is processing wires on top as things got more complex you know we had to up those controls more complex and more important more

(03:53) exactly more important um we had to start introducing new controls but we had a place to put them because we had the initial framework in place as new Crews were getting brought in all they had to do was you know sign on the D at Line This is the model we're gonna follow yeah and then they knew what to do there there wasn't much uh rebuilding every single time a new crew came because they knew you need a product owner you need dedicated funding uh you're a trusted crew and you're the only people that are allowed to do

(04:16) automation for your line of business going forward got it I like the structured approach yeah what I'm interested in though is like anything I'm sure it sounds great but I want to know where did you skin your nose like you know you got to this point and even then when it was simple like what were some of the pit like I wouldn't even call it a pitfall just the little things that you would now be like ha don't do that you know the M of today don't fool yourself we we wore that path down of

(04:42) how to build a bot how to build a team so well that now that we are trying to move out of the scheduled bot world into something different every single group from risk to change at PNC you know everything that we had to we had to get stakeholder buying on before we kind of have to to redo that because when we say oh well this bot I'll interact with the employee directly and they'll be like well that's not what we've talked about everyone has to be re-educated and so uh we wore that path down a little bit too

(05:11) hard in the beginning uh and if we had maybe done it uh with the foresight knowing that there might be changes with the way we wanted to do things in the future could have Incorporated a model in where we were ready for those changes right now it's it's it's almost like we're rebuilding all of the controls and everything from scratch I mean to beir it's hard to know everything right it sounds like you guys had listen a great start and you know it's it's working well you bring up an interesting point

(05:37) right because we do talk about and I use automation co-pilot myself internally I work at automation company so it's you know I'm out here talking about it and living it every day but for an employee that maybe doesn't even know in the back end what you guys are doing they just see through the results and all of a sudden you're like hey here's an interface that you can just go send send a command or a pre-built automation to run for you yeah I'm like excited about it probably but I'm like still on

(06:03) the back end how you build out your flow with the function and with your different stakeholders Etc right it's a completely separate set of stakeholders which is the hard part with scheduled Bots it's almost entirely back office with things that are going to be front office oriented or with employees that aren't generally Ops oriented you've got entirely separate stakeholders that you need to get buying from that we never tried to before and we're that bot team over in that other part of the bank why

(06:27) do they need to worry about us so it's a lot of a lot of re-education a lot of communication that yeah this is all about your evangelism efforts right yeah how you're doing promotion and engagement how you're talking about your program so that's [Music] huge

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