

Xceptor

# Unlock your potential with an Xceptor Center of Excellence

Setting up a Center  
of Excellence

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# Executive summary

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## Setting up a Center of Excellence

Xceptor is a powerful data automation platform that solves myriad business challenges. It doesn't require a high degree of user technical knowledge to improve your operational processes. Nevertheless, many users lack knowledge of the platform's full capability to provide robust data and workflow governance.

An Xceptor Center of Excellence fills this knowledge gap by bringing together professionals who can share deep subject matter expertise to provide support, leadership, and strategy. With governance structures and best practices embedded, duplication is eliminated and important standards are

### Learn how to set up a Center of Excellence, including:

- Key components, scope, and structure.
- Best practices and tips.
- A suggested effective operating model.
- Ways to measure your Center of Excellence's effectiveness.

grounded. And, with robust evaluation and monitoring, you ensure that best practices are captured and your return on investment can be measured.

As well as outlining how a Center of Excellence helps scale Xceptor platform usage, this whitepaper provides recommendations based on our experience of supporting clients during their own Center of Excellence implementations.

In short, it's a resource which introduces the Center of Excellence concept and explains how you can set one up to help your organization get the most from Xceptor. Moreover, how you can increase productivity and career fulfilment amongst your most valuable asset: **Your employees.**

Employees are your greatest asset. Helping them to develop their skills and increase their knowledge improves confidence, promotes satisfaction, and leads to greater efficiency and productivity gains for your organization.

By creating an environment for skills development, you encourage your current workforce to remain with your organization while attracting new employees keen to build on their existing skills. An Xceptor Center of Excellence provides such an environment and empowers your business users to scale Xceptor technology adoption across their functions.



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## Unlock your potential

# What is a Center of Excellence?

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A Center of Excellence is a shared facility that provides leadership, governance, best practices, and an operational model to ensure your Xceptor platform<sup>1</sup> delivers value at scale.

It brings together a cross-functional group of professionals to create an environment that breeds consistency, cohesion, and knowledge retention.

Once implemented, a Center of Excellence engages the business and technology, expands automation by adding extra business cases according to best practices, and removes friction by reducing silos.

1. Many of these best practices can be applied to technologies other than Xceptor but share them with the Xceptor Platform in mind.

What is a Center of Excellence?

## Establishing a Center of Excellence: objectives and results

Broadly speaking, our clients establish a Center of Excellence to meet three core objectives.

The table below defines these objectives and their results.

Objective	Results
Create processes and workflows on Xceptor.	<ul style="list-style-type: none"><li>• Build platform stability and usability.</li><li>• Build foundational training and organizational change management to support adoption of the Xceptor Platform.</li></ul>
Ensure performance and compliance with platform architecture.	<ul style="list-style-type: none"><li>• Manage technical standards and best practices.</li></ul>
Develop new business cases to meet demand and expand Xceptor usage.	<ul style="list-style-type: none"><li>• Identify and scale business case opportunities, positioning Xceptor as a strategic platform that solves myriad end-to-end data-centric business processes.</li><li>• Grow and mature self-service capabilities.</li><li>• Evolve employee and customer experience.</li></ul>

**Xceptor**



## Delivering value through Xceptor adoption

A Center of Excellence is designed to increase adoption of the Xceptor platform and improve user proficiency.

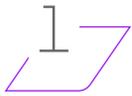
When using Xceptor, the business unlocks almost limitless potential and can demonstrate strong Return on Investment (ROI).

### An operational Center of Excellence enables you to:

- Drive success and return on investment by defining a strategy, governance, and expanding subject matter expertise.
- Empower employees to become experts at automating repetitive tasks and improve productivity.
- Keep up-to-date with the latest Xceptor platform upgrades and releases, and benefit from new features designed to meet your needs.
- Extend Xceptor across multiple business challenges for greater operational efficiency and speed to market.
- Promote efficiency, create feedback loops for shared learning, mitigate risk, and deliver tighter controls.

## Delivering value through Xceptor adoption

### The four key benefits of a Center of Excellence



#### Drive success

A high-performing Center of Excellence allows you to deliver the full value of your Xceptor investment. Your organization's full range of capabilities is maximized, and you are able to effectively demonstrate the platform's multiple benefits to encourage and inspire employees.



#### Skills and knowledge

As a hub of expertise, a Center of Excellence becomes a crucial touchpoint for users to access training, resources, and support. As skillsets are enhanced, they proliferate through the business, and platform adoption accelerates across departments.



#### Risk and compliance

A Center of Excellence boosts user confidence and stakeholder expectations as security and controls are established and managed by the Center of Excellence. Department leaders are better positioned to oversee business compliance and ensure new or updated protocols are robustly implemented.



#### Process and procedure

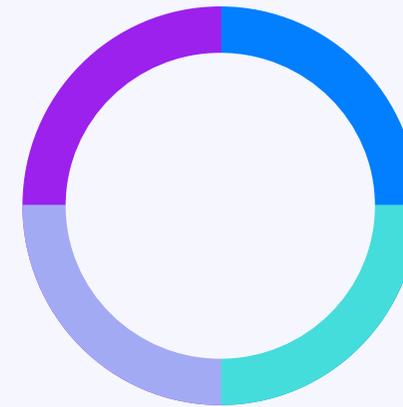
A Center of Excellence entrenches consistency of approach and methodology. By ensuring a structured delivery of processes and procedures that aligns with best practices, your organization retains control and visibility of all platform usage.

#### Driving success

- Deliver value.
- Maximize capabilities.
- Demonstrate benefits.

#### Skills and knowledge

- Empower users.
- Proliferate expertise.
- Optimize adoption.



#### Process and procedure

- Structured delivery.
- Consistency.
- Best practice.

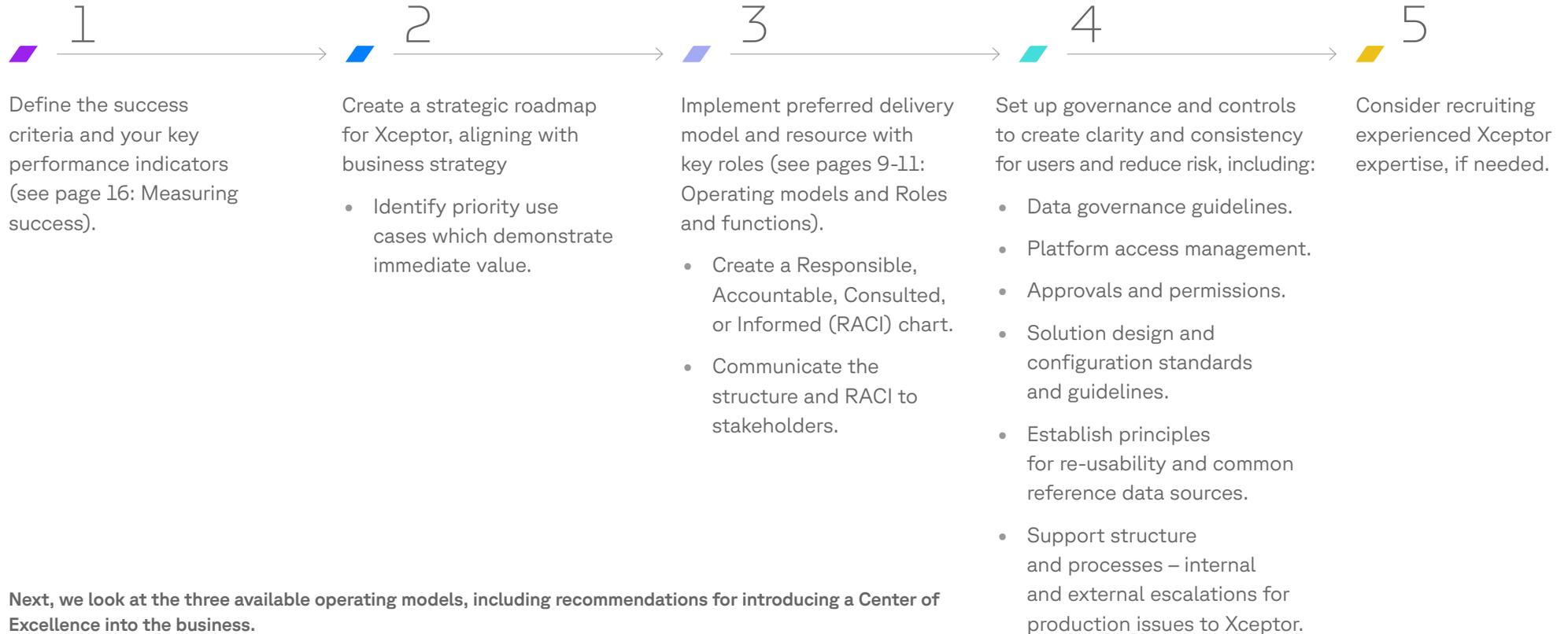
#### Risk and governance

- Security controls.
- Efficient management.
- Robust implementation.

# Laying the foundation for your Center of Excellence

You must build your Center of Excellence on a solid foundation for it to perform and scale as needed.

Below are the five key steps we recommend to build this foundation:



## Operating models / Roles and functions / Delivery model and structure

### Operating models

There are three operating models to choose from when establishing your Center of Excellence: Centralized, Decentralized, and Hybrid.

Within a **centralized model**, one group controls the platform and performs all configurations, from adding new solutions to changing existing solutions. This approach ensures knowledge is consolidated, confers greater control over the platform, and ensures consistency of delivery.

A **decentralized model** is the opposite. Here, everyone has access to Xceptor, and users are free to make whatever configurations they choose. This is not an approach we recommend. Although it can lead to increased adoption and can help proliferate knowledge and expertise, control is difficult to maintain. Moreover, visibility of platform usage

**A Center of Excellence needs to be embedded within a clearly defined operating model to ensure its main functions are achieved.**

becomes opaque and platform-wide changes are more complex to implement.

The third option is a **hybrid model** that blends the strengths of the centralized and decentralized options. It becomes a compelling option once users become competent and confident in their platform usage.

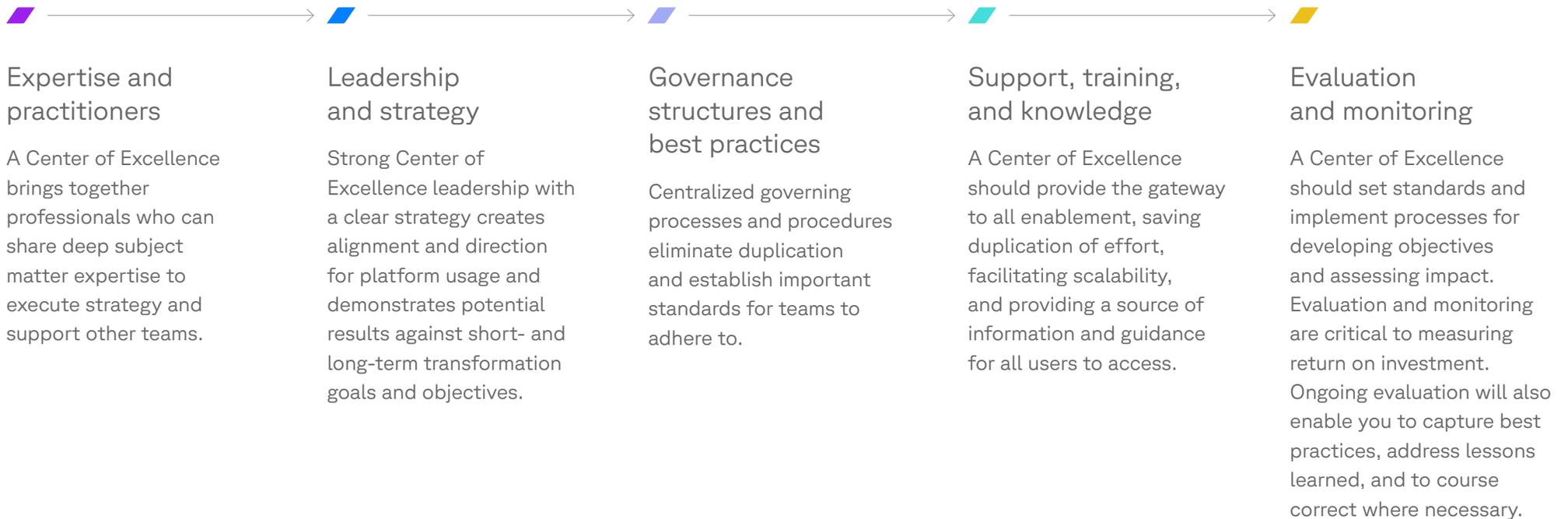
**We recommend starting your Center of Excellence with a centralized model. This will support initial set-up and distribution and ensure users operate within a clear framework while their skills develop.**

**Once employee-wide competence in platform usage reaches an acceptable level, and as business cases and user adoption expand, you can move to a hybrid model to enjoy greater freedoms and efficiency.**



## Operating models / Roles and functions / Delivery model and structure

The main functions of a Center of Excellence are to develop:



Key roles, activities, and measures of success must be defined and designated for a Center of Excellence to perform as intended. Next, we outline what these are and how they fit into the strategy, business delivery, architecture and platform support, and expansion of use cases.

## Operating models / Roles and functions / Delivery model and structure

### Roles and functions

The table below shows potential key roles, activities, and measures of success across a Center of Excellence.

This arrangement can form the basis of a team charter that defines and documents your team's overall objectives, resources, and constraints.

Center of excellence functions	Strategy	Business delivery	Architecture/ platform support	Expansion of business cases
<p>Roles</p>	<ul style="list-style-type: none"> <li>• Business sponsor.</li> <li>• Product owner.</li> </ul>	<ul style="list-style-type: none"> <li>• Product owner.</li> <li>• Project manager.</li> <li>• Lead/tech consultant.</li> </ul>	<ul style="list-style-type: none"> <li>• Product owner.</li> <li>• Lead consultant.</li> <li>• Production support.</li> <li>• Quality assurance.</li> <li>• IT (including database administrator).</li> </ul>	<ul style="list-style-type: none"> <li>• Product owner.</li> <li>• Business analyst.</li> </ul>
<p>Activities</p>	<ul style="list-style-type: none"> <li>• Business case management.</li> <li>• Platform implementation based on business cases.</li> <li>• Governance oversight.</li> </ul>	<ul style="list-style-type: none"> <li>• Project management.</li> <li>• Resource management.</li> <li>• Training.</li> <li>• Business education.</li> </ul>	<ul style="list-style-type: none"> <li>• Architectural oversight.</li> <li>• Data management.</li> <li>• Integration.</li> <li>• Security.</li> <li>• Upgrade planning.</li> <li>• Standards and best practice.</li> <li>• Scaling for growth.</li> </ul>	<ul style="list-style-type: none"> <li>• Expansion occurs following the identification of different business cases and value realization.</li> </ul>
<p>Measure of success</p>	<ul style="list-style-type: none"> <li>• Value realization from business case development and management.</li> </ul>	<ul style="list-style-type: none"> <li>• Adoption.</li> <li>• Certification.</li> </ul>	<ul style="list-style-type: none"> <li>• Platform security.</li> <li>• Platform performance.</li> <li>• Ease of system administration and management.</li> <li>• Platform upgrade.</li> </ul>	<ul style="list-style-type: none"> <li>• Adoption and usage.</li> <li>• Expansion of business cases.</li> </ul>

## Operating models / Roles and functions / Delivery model and structure

### Delivery model and structure

Once you get started, you can change or enhance the set-up of your Center of Excellence. However, the demands specific to your organization will influence what you can do as time progresses.

The structure of your Center of Excellence will depend on the size of your business and the resources at your disposal.

### The optimal structure for larger enterprises:

- ▀ Strategy and value.
- ↓
- ▀ Business engagement and delivery.
- ↓
- ▀ Platform architecture and support.
- ↓
- ▀ Business case expansion.

# Empowering your teams

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With your Center of Excellence established, you must begin empowering your teams to realize investment returns quickly.

**Below are seven actions we recommend to empower your teams:**

- 1 Integrate Xceptor Connect into your Center of Excellence learning resources.
- 2 Build a knowledge management repository.
- 3 Create and offer bespoke training courses, content, and workshops relevant to your organization's needs.
- 4 Evolve and further develop capabilities and required resources (see page 14: Creating a network of champions).
- 5 Employ a 'train the trainer' approach to encourage continuous learning, using our learning resources coupled with your own.
- 6 Stay up-to-date on new features and functionality and share these across the Center of Excellence community.
- 7 Appoint a Center of Excellence sponsor and create a demand management strategy to empower the team.



# Creating a network of champions

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**Sitting inside your Center of Excellence and around the business, champions can become highly effective advocates for the Xceptor platform.**

Typically, your champions will be early Xceptor adopters who provide ongoing support as usage scales into different business areas.

Empowerment relies on constant and strong lines of internal communication and engagement. Next, we look at how you can achieve both.

## **Pay it forward with champions**

Champions offer guidance and share their expertise with colleagues who become your champions and experts of the future. Over time, your network grows into a community which supports the work of others.

The role of a champion can be recognized as part of an individual's career and personal development goals, as well as in annual performance appraisals.



# Communication and engagement

The success of your Center of Excellence will be strengthened by creating an internal communication plan that builds awareness and engages stakeholders, from leaders and managers to your user engagement team.

Be open with your organization. While this might sound obvious, it's easy to forget to communicate and collaborate with each line of the business.

## Be sure to constantly:

- Engage and excite existing and potential stakeholders about Xceptor's capabilities.
- Share successes and case studies within your organization to ensure other departments and teams can see the benefits and identify ways Xceptor could enhance their work.

Ultimately, you need to let the platform users themselves do the talking. Consider organizing showcases to encourage users to share success stories, demonstrate value with data and insights into return on investment and transformation results, and talk generally about their experiences with the Xceptor platform.

It's not possible to understand the full impact of your Center of Excellence unless you have value metrics in place to determine success. Next, we outline key activities and deliverables across the four Center of Excellence functions and how the success of each can be measured.

# Measuring success

You can measure the return on your investment into a Center of Excellence across several value metrics, including but not limited to error rates, processing capacity, and employee impact.

Ensure you establish metrics and objectives for each business case and evaluate these post-implementation. Meanwhile, define key performance indicators and construct a roadmap for strategic initiatives.

**As per the table below, establish a suite of measures across the following:**



## Xceptor Center of Excellence functions

### Activities and deliverables

## Define business cases aligned with strategy

- Define appropriate business cases and relevant metrics.
- Use identified high-value opportunities.

## Business engagement and delivery

- Identify relevant roles to manage demand and resources.
- Upskill end users via training.
- Measure adoption through certification.
- Raise awareness of Xceptor.

## Platform architecture and support

- Deployment.
- Security standards.
- Technical standards.
- Upgrade management.
- Configuration management.

## Platform adoption, business case expansion

- Expand number of business cases through adoption.
- Empower users.
- Learning and knowledge retention.

### Measures of success

- Increased automation.
- Risk reduction.
- Cost savings.

- Projects delivered on time and on budget.

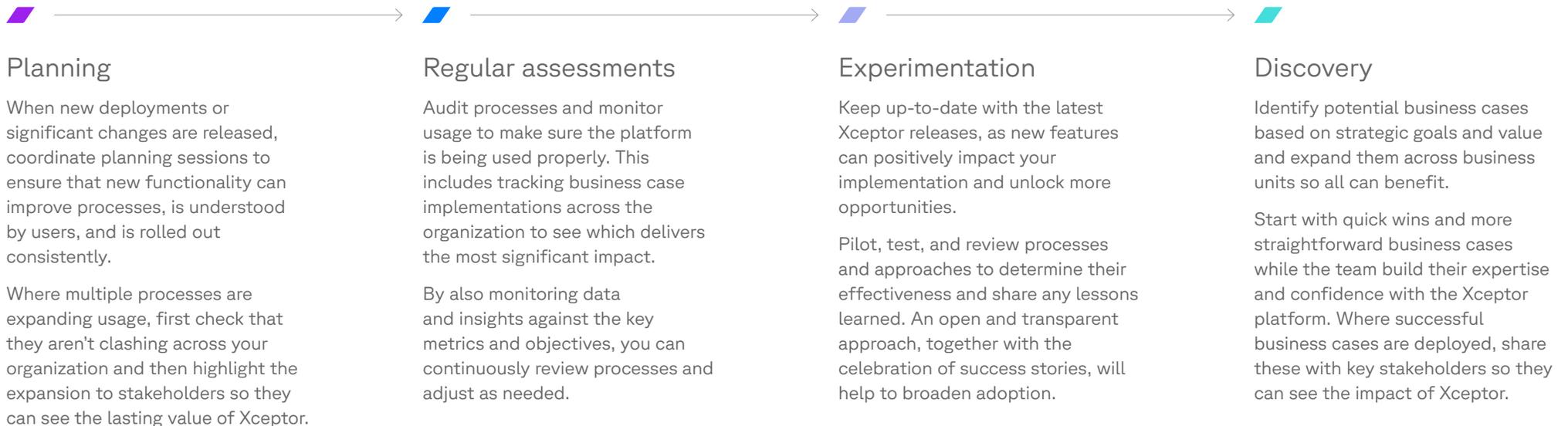
- Platform performance and compliance, including upgrades.

- Adoption and opportunity.
- Business case capture.

An effective Center of Excellence is in a constant state of evolution, meaning successes must be validated to ensure ongoing improvement. Next, we explore how continuously planning, assessing, experimenting, and discovering can inform and entrench accurate success validation.

# Success validation and improvement

Over time, your Center of Excellence should become organic, scaling and adapting to your organization's performance and evolution.



Start small and watch as your Center of Excellence develops your skills, grows your expertise, and delivers positive impacts across your organization.

# In summary

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**As this whitepaper has hopefully demonstrated, a Center of Excellence is a formidable means of extracting the full potential from the Xceptor platform.**

When the whole organization is competently and confidently expanding automation while adding new business cases according to best practices, productivity and fulfilment reach levels many once believed to be unobtainable. However, establishing and maintaining a high-performance Center of Excellence is not an overnight task. It requires you to:

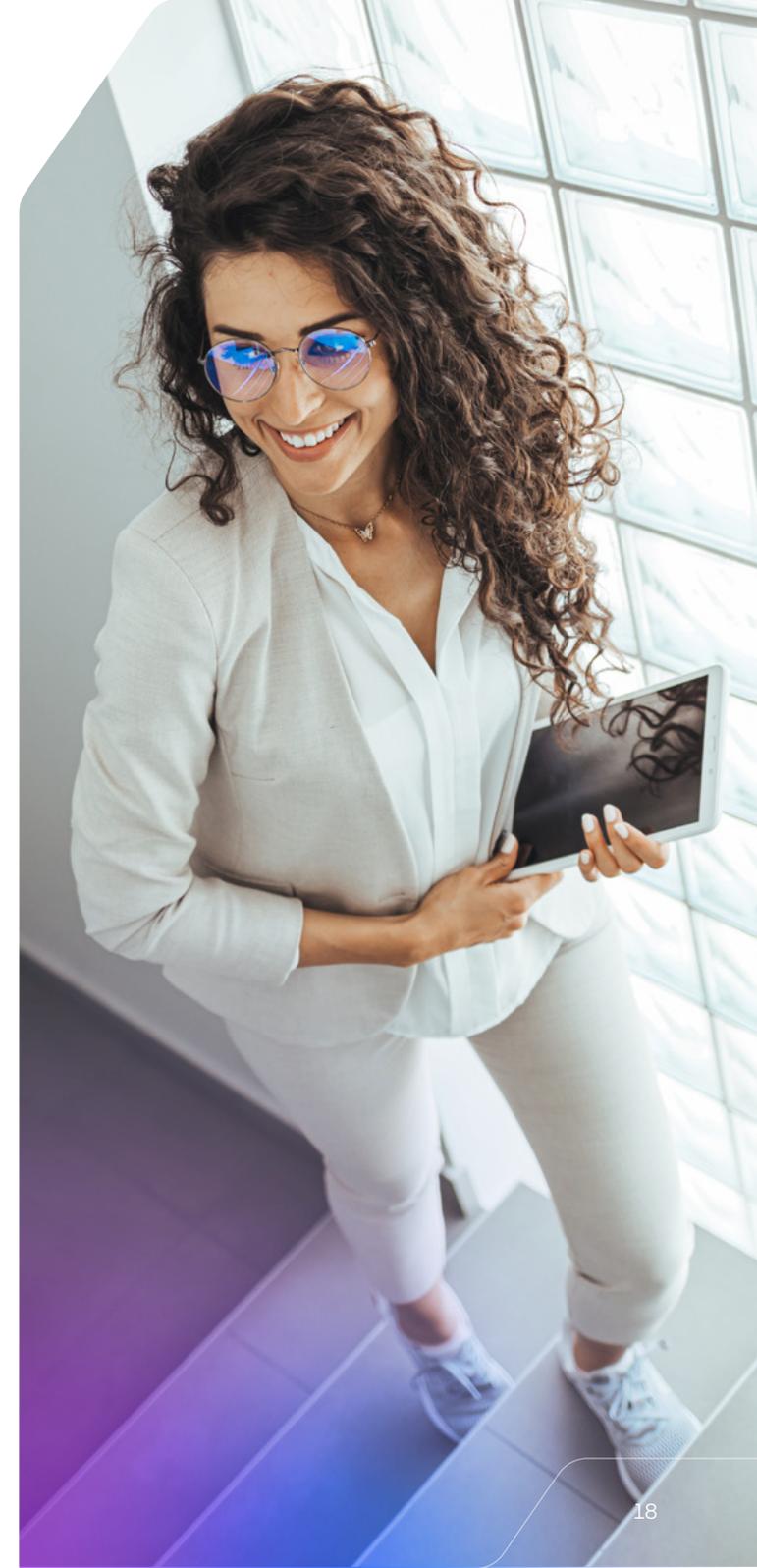
- Decide on and implement an operating model that complements your ambitions and objectives.
- Assign key roles with functions and responsibilities, define activities, and agree on measures of success.
- Embed an optimal structure and delivery model for larger enterprises, such as global banks.

**At various points in your Center of Excellence journey, you may find that you need additional support to maximise your potential. In the final section, we outline the expert help that's available to you at all times.**

Although these steps will allow you to create a strong foundation for your Center of Excellence, they are not enough for it to function optimally as time progresses. The most high-performing Centers of Excellence are organic and engage with every part of the business.

Your Center of Excellence can do the same by:

- Empowering your teams with constant training and development.
- Creating a network of champions who provide ongoing support and guidance as usage scales.
- Communicating and engaging with stakeholders by sharing the benefits and value of Xceptor to daily tasks together with the promotion of success stories.
- Measuring success to ensure you are leveraging maximum return on investment.
- Validating and improving to ensure the ongoing success of your Center of Excellence.



# How we can help

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This whitepaper provides a general overview of the advantages of setting up an Xceptor Center of Excellence, outlining the steps that lead to greater success measured by productivity gains and contented employees.

Every institution is different, and you may need to tailor these guidelines to your specificities and ambitions.

As our clients deploy the Xceptor platform across over 3,000+ business cases and dozens of operational groups and functions, delving deeper within this document is impractical.

However, our expert teams stand ready to share more insight and support your Xceptor Center of Excellence design, implementation, and success. Should you wish to proceed with your own Center of Excellence, the following will be key contact points:

- **Client engagement team:** Your first point of contact to discuss next steps and determine who will oversee the successful delivery of your Center of Excellence.
- **Customer success engineers:** Able to provide advanced knowledge and support you with more technical guidance and training across the Xceptor capability range.
- **Professional services team:** Consultants who will provide the technical expertise required for new business case implementation, custom-build projects, technical augmentation, and more.
- **Enablement:** Providing coaching and mentoring as you progress along your Center of Excellence journey, including formal training and continuous learning via Xceptor Connect and other user activities.

**Our clients have unlimited access to Xceptor Connect which includes the Xceptor Academy, Xceptor Docs, Xceptor Huddle, and Xceptor Sandbox. Together, these services provide invaluable training and resources to support your Center of Excellence and your wider user community.**

# Unlock your potential with an Xceptor Center of Excellence

As the world of banking and finance becomes increasingly digitized, a continuing reliance on outdated technologies and manual processes becomes harder to justify.

Legacy approaches and methodologies invite unnecessary risk, waste precious time, and can damage customer relationships.

Equipped with our powerful data automation platform and a Center of Excellence to maximize its full capability, you can unlock your organization's true potential.

[CONTACT US TO GET STARTED](#)

Xceptor