Linking the Enterprise Architecture Framework to the 5 Year Planning Process:
Planning for Declining Technologies

Steven P. Davis, Chief Architect and VP IT, Walt Disney Studios
The Walt Disney Company

Revenue Business Segments

The Walt Disney
Studios

Disney Consumer Products

Parks and Resorts

Media Networks

Walt Disney World
Disneyland Resort
Disneyland Paris
Japan
Hong Kong

Domestic & International
Film Distribution
Home Video
Music Group
Miramax

Licensing
Soft/Hard Goods
Disney Stores

Cable Networks Group
ABC Family
Disney Channel
Toon Disney
SoapNet
Walt Disney Television Animation
Lifetime Entertainment Services
A&E Television Networks
ESPN
Owned & Operated TV & Radio Stations
Walt Disney Internet Group
Technology Lifecycle Classifications

Technology Decision Framework Characteristics Definition

**Planning Horizon**

- **Emerging**
  - New technologies
  - Driven by the market
  - Potential business value
  - High risk
  - Unproven technology

- **Under Eval**
  - Recognized strategic value
  - Sanctioned
  - Prioritized
  - Under formal review
  - Published results forthcoming
  - Not approved for deployment

- **Core**
  - Approved standard
  - Proven
  - Sustainable
  - Strategically sourced
  - Focus for training and cast development defined
  - Enterprise scope

- **Declining**
  - End of life
  - Out of favor
  - Non sustainable
  - Vendor risk
  - Cost escalating
  - Migrating away from
  - No new implementations

- **Specialized**
  - Defined justified unique business case

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Breaking Down “Declining Technology”

- **Version or Model based Obsolesence**
  
  For example SQL Server 2000 in relationship to SQL Server 2005; hardware would typically be a discontinuation of a model.

- **Platform based**
  
  A determination that a particular platform is no longer viable (an historic example would be VAX/VMS). This can happen as a function of the market, i.e., a vendor fails to demonstrate support for a technology either explicitly or through inaction. It can also be a result of a superior emerging technology.

- **Supplier based**
  
  The removal of a supplier as a vendor. This can be driven by internal policy – a reaction to supplier relationship issues, mismanagement, bankruptcy, corporate values “mismatch”, and so forth.
The Problem

- Obsolete and Declining technology not being addressed in a systematic way.
- Associated risk is recognized but continues to build with each passing year, because:
  - There is always something more important – “The roof isn’t leaking, why replace it? Besides, we need a new kitchen.”
  - Current system is “running fine” and costs are typically stable – “My 15 year old car is running fine and there are no annoying monthly payments”
- When costs do begin to escalate they rise fast and it is difficult to respond with a solution
The Opportunity

- Introduce “technology obsolescence” as a strategic planning driver ensuring business units address the issue with scheduled investments
- Leverage business driven enhancements as an opportunity to replace declining technology – “replace the water lines in the street just before repaving”
- Any replacement of sunset technology results in the adoption of “Core” technologies furthering architectural strategy
The Big Idea

- Enterprise Architecture Framework classifies Declining Technologies
- EA Repository associates Declining Technologies with Applications
- 5 Year Strategic planning is an existing annual and quarterly ritual engrained in the culture.
- Rituals are a powerful way to establish ongoing behavior, i.e., “Hitch our wagon to that star.”
- Create policy to establish mandatory investment initiatives in the 5 Year Strategic Planning Process to address declining technologies in the application portfolio
The Rituals

Three interlocking rituals...

- **Enterprise Architecture Framework rituals**
  Ensures that the Declining technology designations are kept current and in synchronization with the 5YP rituals

- **Application Portfolio rituals**
  Provides the identification of applications dependent on Declining Technologies

- **Planning Board Rituals**
  Incorporates findings into the 5YP process ensuring awareness of risks and appropriate investment planning
The planning drivers for the Enterprise Architecture framework are:

- Business Strategy
- Architecture Principles
- Technology Strategy
- Sourcing Strategy
Enterprise Architecture Infrastructure Approach

Technical Architecture Layers

- The Technical Architecture layer describes the collection of network, hardware, infrastructure management, and core services components that comprise the computing environment.
- It describes how various physical components are joined together and how they are effectively managed through enterprise-wide processes.

Technical Architecture Components

- Network/System Management
- Capacity Management
- Change Management
- Data Center Facilities
- Business Continuity, Backup/High Availability/Disaster Recovery

Enterprise Architecture Infrastructure Approach

Technology Decision Framework Characteristics Definition

- Emerging
  - New technologies
  - Driven by the market
  - Potential business value
  - High risk
  - Improving technology

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- Core
  - Approved standard
  - Proven
  - Sustainable
  - Strategically sourced
  - Focus on maintaining and cost reduction
  - End of life, out of favor
  - No new implementations

- Declining
  - End of life
  - Out of favor
  - Non-sustainable
  - Disk-based
  - Disaggregation
  - Migrating away from
  - No new implementations

- Specialized
  - Defined, justified unique business case

Architecture Council - Standards Implementation Approach

Unix-based Server Standards

- Implementation Plan Components
  - Strategy/Vision
  - Applicability
  - Pricing Information
  - Policy
  - Procedures
  - Governance
  - Policy Implementation Timeline
  - Technology Roadmap

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Enterprise Architecture Model Framework

Enterprise Architecture

Application Architecture

Data Architecture

Development Architecture

Technical Architecture

Security
The Technical Architecture layer describes the collection of network, hardware, infrastructure management and core services components that comprise the computing environment.

It describes how various physical components are joined together and how they are effectively managed through enterprise-wide processes.
Technical Architecture
Components

Core Services
- Directory Services
- Messaging & Collaboration Services
- Workflow Services
- File & Print Services
- Content Delivery Network Services
- Database Services

Infrastructure Management
- Network / System Management
- Capacity Management
- Change Management
- Data Center Facilities
- Business Continuity Backup/High Availability/Disaster Recovery

Platforms
- Client Devices
- Storage
- Servers & Mainframes

Network
- LAN/MAN
- WAN
- Telephony
- Wireless / Mobile
- Video / Broadcast
Technology Decision Framework

Technology Decision Framework Characteristics Definition

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Enterprise Architecture
Framework Rituals

- Enterprise Architecture Framework technology Domain planning
  - Technology Decision Framework updated as ritual
  - Review cycles are dictated by the frequency of change in the domain marketplace – most are annual
  - Outcome of review is designation of Declining status to what were previously Core
  - New Core designations become the recommended replacement or remediation

- Desirable to coordinate publication of information in alignment with the 5YP process.
  - Desirable to associate Declining technology with applications or systems
  - Assumption that cross reference between technology and the application portfolio is being maintained
Enterprise Architecture
Framework Rituals

- Earliest annual start date for 5YP is December
  - Start month varies by “Segment” of company
  - Planning “season” is December through May

- Annual domain updates ideally published by September
  - Happens to coincide with our fiscal year
  - Provides the months of October and November for Application Board and Planning board to prepare materials for 5YP.
  - Bi-annual updates are published in March – still in time to influence results of 5YP which is typically complete in May
  - Quarterly updates would be late January and end of June (end of December not feasible due to holiday impact)
Example cycle

1. EAB publishes Declining Technologies in EAF by September each year
2. Applications using obsolescent technology identified via EART
3. Investment Initiatives inserted in 5YP templates
4. Planners review level of investment required & time to complete initiatives
The Benefits

♦ Disney is ensured that technology obsolescence is being addressed with planned investments

♦ Investments tied to the 5YP ritual ensures adequate resources and funding are available, reducing overall risk

♦ Technology refresh in synergy with value proposition driven investments – business driven enhancement project in sync with a technology refresh

♦ Leveraging of resources for mass technology upgrades, e.g., database or operating system upgrades

♦ Improved planning for emerging and core technologies, i.e., declining technologies replaced by core, new core derived from emerging
IT Project Drivers

♦ Revenue Enhancing – direct differentiating contribution to the business

♦ Income Growth – value driven by cost efficiency

♦ Technology Obsolescence - need to refresh technology infrastructure

♦ Obligatory – related to compliance, regulatory, statutory, contractual, etc.

♦ Strategic – imperative based on market conditions although value proposition is difficult to quantify

♦ Risk – the non obligatory initiatives that reduce legal or business exposure
# Studio IT Planning Calendar Rituals

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**Studio 5 Year Plan**

**Studio Finance AOP**

**Self Evaluation**

**Event-driven**: Capital or Expense project creation, PAR creation

### LEGEND

- **A** Studio IT All-hands meeting
- **B** SOX Testing
- **C** 5Q Forecast & Performance Metrics
- **D** SER
- **E** Budget to Actuals

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A. Architecture Group participates in maintaining the EAF and the designation of technologies as specified in the TDF (Technology Decision Framework)
   - Architecture Group involves relevant Studio IT project architects
   - Architecture Group recommends changes to the EAF
   - Architecture Group validates recommendations with Architecture Governance Committee

B. Architecture Group evaluates existing Application Portfolio (maintained by Planning group)
   - Architecture Group compares portfolio against EAF and TDF
   - Architecture Group recognizes exceptions (Specialized), identifies Declining technology and recommends Sunset policy
   - Architecture Group validates recommendations with Studio Architecture Steering Committee
   - Informs Planning Group which incorporates actions in 5YP and AOP planning cycle
Architecture Use Cases
Declining Technology

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Use Case A - Platforms
Silver Bullet Pro

EAF->Application Architecture->Platforms status update for Silver Bullet Pro

1. Architecture Group participates in EAB (probably annual) determining TDF designations for Platforms within Application Architecture.

2. EAB consults the Application Architecture Framework and identifies relevant platforms (e.g., .Net, J2EE as well as Silver Bullet Pro)

3. EAB assigns stakeholders across the Enterprise to evaluate the platforms and recommend a status for each.

4. Stakeholders will utilize a set of agreed upon characteristics (see Selection Criteria slide) to perform their evaluation.

5. In context of other existing platforms, Stakeholders determine that Silver Bullet Pro lifecycle from Core to Declining technology.

6. Subsequent review of Application Portfolio identifies Studio applications “platformed” on Silver Bullet Pro, recommends a Sunset Policy.

7. Sunset Policy drives decision making around investment (whether expense or capital) in identified Applications.
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### Use Case B
**Silver Bullet Pro example**

**Sunset Policy for Silver Bullet Pro technology**

1. Architecture Group confirms that Silver Bullet Pro is designated a Declining technology
2. Architecture Group evaluates business impact of Sunset Policy of Silver Bullet Pro by speaking with Silver Bullet Pro customers and support team
3. Architecture Group recommends sunset strategy for Silver Bullet Pro
4. Architecture Group validates recommendations with Studio IT Architecture Steering Committee
5. Architecture Group informs Planning Group of recommendations
6. BTPs inform Business Units of Sunset Policy and guidance around investments

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<thead>
<tr>
<th>AgencyNet example</th>
<th>Change Driver</th>
<th>System Impact</th>
<th>Architecture Group Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scenario 1: Change to due SOX compliance</strong></td>
<td>Obligatory</td>
<td>Low</td>
<td>Proceed with change</td>
</tr>
<tr>
<td><strong>Scenario 2: Change in business process of screenings</strong></td>
<td>Screening security, simplification of business process</td>
<td>High</td>
<td>Re-platform, redefine project</td>
</tr>
</tbody>
</table>
Investment Decision Tree

- Architecture objective: Evaluate cost-benefit of continuing investment in a declining technology versus re-platforming to a “Core” platform
- Policy objective: Anytime a new investment is considered, the Project Team and the Architecture Group apply an Investment Decision tree
- “Major Change” is illustrative – decision criteria and characteristics need to be determined

Is Platform “Declining”?  
Yes  
No

Under “Sunset Policy”?  
Yes  
No

Is “Major Change”?  
Yes  
No

Re-platform to “Core”

Proceed with investment

• Architecture objective: Evaluate cost-benefit of continuing investment in a declining technology versus re-platforming to a “Core” platform
• Policy objective: Anytime a new investment is considered, the Project Team and the Architecture Group apply an Investment Decision tree
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Q & A