Center of Excellence Framework

A new approach on an old story.

Hans Skalle & David Zimmerman | Splunk Business Value & Customer Success

27 Sept 2017 | Washington, DC
Forward-Looking Statements

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The forward-looking statements made in this presentation are being made as of the time and date of its live presentation. If reviewed after its live presentation, this presentation may not contain current or accurate information. We do not assume any obligation to update any forward looking statements we may make. In addition, any information about our roadmap outlines our general product direction and is subject to change at any time without notice. It is for informational purposes only and shall not be incorporated into any contract or other commitment. Splunk undertakes no obligation either to develop the features or functionality described or to include any such feature or functionality in a future release.
Why a Splunk CoE?
What We’ve Learned

- Ad Hoc usage
- Few standards
- Data onboarding inconsistency
- Minimal reuse across teams
- Skills gaps
- Uncertain value
What We’ve Learned
Using best practices early to accelerate customer value and success

- Actively looks for new value drivers
- Tracks benefit realization
- Effectively manages the platform
- Manages user and data onboarding, license use
- Skill-building matches deployment
- Active executive sponsorship

Accelerated Value Realization Profile

Value

Accelerated Value

Time

Greater Value

What We’ve Learned: Using best practices early to accelerate customer value and success.
When does a CoE Add Value?
A CoE can help reduce complexity and cost through best practices and reuse

- Growing number of users, user types
- Growing number of use cases
- Multiple deployments, geographies
- Higher data volumes

See Splunk Whitepaper: Building a Splunk Center of Excellence, 2017
When does a CoE Add Value?
A CoE can help reduce complexity and cost through best practices and reuse

Get started early! Lay the foundation with CoE tools and best practices.

- Initial Use Case, Single Instance
- Workgroup, Multiple Use Cases
- Enterprise Deployment
- Expansion, Distributed Deployment

See Splunk Whitepaper: Building a Splunk Center of Excellence, 2017
Why a Splunk CoE?
The benefits of CoE best practices

- Lower cost of ownership, reduced complexity
- Retention of highly skilled IT staff
- Creation of a culture of excellence
- Best practices and knowledge transfer
- Recognition of IT’s contribution to business
- Increased business and IT collaboration

See Splunk Whitepaper: Building a Splunk Center of Excellence, 2017
What is a Splunk CoE?
A best practices center focused on Splunk Governance, Operational Excellence, Enablement and Collaboration designed to accelerate and grow Business Value.
Splunk Center of Excellence
Six competencies supported by best practice accelerators

- **Business Value**
  - Business-driven objectives
  - Value Realization

- **Collaboration**
  - Community
  - Sharing

- **Governance**
  - Standards and processes
  - Decision-making

- **User Enablement**
  - Orientation
  - Education and empowerment

- **Operational Excellence**
  - Deployment and maintenance
  - Support
What does a CoE do?
CoE Foundation Services

Supporting Competencies

Business Value
Governance
Operational Excellence
Enablement
Collaboration

Best practice-based capabilities that include tools, techniques, standards, processes and oversight

Platform Mgmt.
Data Lifecycle Mgmt.
User Lifecycle Mgmt.
KO and App Lifecycle Mgmt.
Use Case Lifecycle Mgmt.
Exec Interlock
Program Mgmt.
CoE Foundation Services

Supporting Competencies

Business Value
- ROI/TCO
- Cost mgmt.

Governance
- Change control
- Service levels
- Chargeback
- License mgmt.

Operational Excellence
- Design
- Capacity mgmt.
- Deployment
- Maintenance
- Staffing

Enablement
- Support triage
- Help Desk

Collaboration
- Search peering

Supporting Competencies

Platform Mgmt.

Data Lifecycle Mgmt.

User Lifecycle Mgmt.

KO and App Lifecycle Mgmt.

Use Case Lifecycle Mgmt.

Exec Interlock

Program Mgmt.
For more: CoE@splunk.com
Using the CoE to streamline your Path to Production

Splunk Value Driver

Idea
Bus. Case
Requirements

Splunk Platform

Capacity
Data Governance
Stds, Retention, Access

Data Lifecycle

Data Sample
Data Onboarding
Data Normalization

User Lifecycle

Access
Orientation and Training
Enablement

Value Realization

Reporting
Dashboards
Reports
Alerts

Analysis
Ad hoc search
Correlations

KO
Repository
Using the CoE to streamline your Path to Production

- **Splunk Value Driver**
  - Idea
  - Bus. Case
  - Requirements

- **Splunk Platform**
  - Capacity
    - Data Governance
      - Stds, Retention, Access

- **Data Lifecycle**
  - Data Sample
  - Data Onboarding
  - Data Normalization

- **User Lifecycle**
  - Access
  - Orientation and Training
  - Enablement

- **Value Realization**
  - Reporting
    - Dashboards
    - Reports
    - Alerts
  - Analysis
    - Ad hoc search
    - Correlations

- Checkpoints
- KO Repository

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Using the CoE to streamline your Path to Production

Splunk Value Driver
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- Bus. Case
- Requirements

Data Lifecycle
- Data Sample
- Data Onboarding
- Data Normalization

User Lifecycle
- Access
- Orientation and Training
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Splunk Platform
- Capacity
- Data Governance
  - Stds, Retention, Access

Value Realization
- Reporting
  - Dashboards
  - Reports
  - Alerts
- Analysis
  - Ad hoc search
  - Correlations

KO Repository

Feedback Loops
Using the CoE to streamline your Path to Production

Making machine data accessible, usable and (more quickly) valuable to your organization.
Using the CoE to streamline your Path to Production

Business Value
- ROI / TCO models
- Data Source Assessment (Reuse, Add’l Use Cases)
- Requirements Template…

Operational Excellence
- Reference Architectures
- Naming Conventions
- Staffing Guides
- Logging Best Practices
- Chargeback and Health Check Apps…

Data Lifecycle
- Data Onboarding Request Form
- Data Onboarding Best Practices
- CIM App
- SLA and SLO Best Practices…

User Lifecycle
- Training and Education Plans
- User Onboarding and Workspaces Best Practices
- Welcome Page Creator
- Newsletter App…

Value Realization

Business Value
- KO Best Practice Guides
- Value Realization models
- Value Dashboards…

Ad hoc search
Correlations
KO Repository

Splunk Value Driver

Idea
Bus. Case
Requirements
CoE Foundation
## COE Foundational Components

### Executive Sponsorship
- Owner
- Empowerment
- Aligned with business objectives

### CoE Structure
- Centralized
- Federated
- Hybrid

### CoE Operating Model
- Roles and responsibilities
- Communication
- Functional areas

### Executive Charter
- Mission
- Roadmap

### Program Management
- End-to-end oversight
- Priorities
- Governance
- Project Management

### CoE Metrics
- Quantified success
- KPIs and SLAs
- Value dashboards
COE Structure

Centralized

Federated

Hybrid
Splunk CoE Operating Model

Sponsor
Program Management
Program Manager
Project Manager
Architect
User
Expert User
Knowledge Manager
Operations
Engineer
Developer
Customer-Facing
Tracking Value Realization
Value Dashboards provide visibility into progress and results

Outage and Labor Hours saved
60%

Deployment Progress

Results Chart
Building a CoE
CoE Self Assessment

Use this to learn more and establish a baseline for best practice-based improvement

- 8-10 Questions in each competency area
- Questions map to successful best practices
- Establishes a baseline, gives visibility to gaps
- Helps identify your priorities to build an action plan

CoE Foundation

Executive sponsor(s) have bought in, are fully engaged and enabled by C-level execs to succeed

Executive-level stakeholders are actively engaged and visibly supportive

Mission and objectives

Click on the % value that you feel best represents your company
CoE Self Assessment

Use this to learn more and establish a baseline for best practice-based improvement

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### CoE Self-Assessment: Management Sponsorship

<table>
<thead>
<tr>
<th>CoE Self-Assessment: Management Sponsorship</th>
<th>Chart</th>
<th>Task List</th>
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<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
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<td>4</td>
<td>5</td>
<td>6</td>
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#### CoE Foundation

Executive sponsor(s) have bought in, are fully engaged and enabled by C-level execs to succeed

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Executive-level stakeholders are actively engaged and visibly supportive

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Mission and objectives are clearly defined and driven by business priorities

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Evaluate against Good, Better, Best profile comparisons. Profiles are based on real-world examples

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Chart of Results

How’d you do? As you are looking at these results, keep in mind that your optimal scores will depend on the needs of your organization. Whatever your goals, we’ll be with you every step of the way to excellence.

- Good
- Better
- Best

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Current state

Good Benchmark
Good, Better, Best evolution

Value Delivery Capability

Foundational

Proactive

Strategic

Data Onboarding

User Onboarding

Automation & Self-Service

Welcome Page Creator

Newsletter App

Business-Driven New Value Creation

KO Repository/User Groups
Customer Story
Splunk CoE Success Story

4TB Customer

- Primary Use Cases: Security, IT Operations, Compliance
- 300+ Users
- 50 Clustered Indexers
- 500K Searches/Day
- 8 Search Heads

Deployment Challenges

- Data Onboarding: Weeks/Months
  - Became Days
- Search Performance: Minutes
  - Became Seconds
- Notable Events
  - Became Actionable Alerts

CoE: No Splunk Owner

Business Value: Security posture

Governance: Data governance

Ops: Good staffing and platform resources

Enablement: Good User onboarding and training plan

Collaboration: Central repository and User Groups

CoE Foundation

Business Value

Governance

Operational Excellence

Enablement

Community

Better

Current

Exec Sponsor, Program Mgr.

Priorities & Reqmts.

CIM Compliance, Retention

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Making machine data accessible, usable and valuable to everyone.
What next?
Call to Action

- Visit the Customer Success Studio
- Complete the CoE Assessment
- Pick up Best Practice Handouts
- eMail us at coe@splunk.com
## User Onboarding: Helping Users, So They Can Help Themselves

### Incentive-Driven User Access

- **User Experience**
- **User Roles and Capabilities**

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## Basic Principles of User Onboarding: Things For Every Admin To Consider

<table>
<thead>
<tr>
<th>User Roles and Capabilities</th>
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</thead>
<tbody>
<tr>
<td>Split roles and capabilities</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Limit permissions</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>User Experience</th>
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<tbody>
<tr>
<td>Give each team their own app</td>
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</table>

<table>
<thead>
<tr>
<th>Create a Welcome Page for each team</th>
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<tbody>
<tr>
<td>Set up a Welcome Page for each team.</td>
</tr>
<tr>
<td>Splunk's Welcome Page Creator is designed for this purpose:</td>
</tr>
<tr>
<td><a href="https://docs.splunk.com/Doc/7.0.5">https://docs.splunk.com/Doc/7.0.5</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hide all other apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is recommended that you remove read permissions for all apps the user won’t be needing or isn’t ready to handle.</td>
</tr>
<tr>
<td>Do everything you can to ensure that users are not distracted by other items deployed to the Splunk environment.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Incentive-Driven User Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t be a data butler</td>
</tr>
<tr>
<td>Typically, users will try to skip the required education. If they already have access to everything and can just ask you for what they need - why would they take a class?</td>
</tr>
<tr>
<td>Make sure users are motivated to learn best practices. This means no access until they’ve completed certification and education.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grant capabilities to advanced users only</th>
</tr>
</thead>
<tbody>
<tr>
<td>You should grant capabilities only to the users who qualify with your certification or education requirements.</td>
</tr>
</tbody>
</table>
## Determining Splunk Team Size

### Variables

<table>
<thead>
<tr>
<th>Daily Ingest</th>
<th>Deployment Size</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Users</td>
<td># of Data Sources</td>
</tr>
<tr>
<td># of Searches</td>
<td># of Knowledge Objects</td>
</tr>
<tr>
<td>Service Level Objectives</td>
<td>Separation of Duties</td>
</tr>
</tbody>
</table>
# Customer Success Studio

## CoE Best Practice: Data Onboarding Handout

### Data Onboarding: It's Iterative and Ongoing

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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</table>
| Step One: Initial Request | ✓ Keep the initial data request simple. You'll reduce inefficiency and confusion by requiring less information upfront.  

✓ You can verify details in the next step, during the data definition meeting.  

✓ For this step, gather things that would be hard to communicate on the phone (hostnames, filesystem locations, etc.) |
| Step Two: Definition | ✓ During this phase, have a discussion with the requester and schedule a data definition meeting.  

✓ You'll review a data sample, discuss the use case, and set up initial dashboards. |
| Step Three: Implementation | ✓ If a good data process is in place, technical implementation should go smoothly the first time. |
| Step Four: Value | ✓ Focus on knowledge objects. What fields, searches and dashboards does the requester need? How can the requester get value immediately, regardless of their Splunk skillset?  

✓ Don't let implementation overshadow this step. You'll often identify potential value the requester doesn't even know to ask for. |
| Step Five: Validation | ✓ Ask the requester to validate and review what you've produced.  

✓ Once the requester validates the data, you can move the implementation to production (including search-time knowledge objects). |
| Step Six: Announcement | ✓ Help your community understand how this data point can help them.  

✓ Make sure to announce how to access the data, what the data represents, and what knowledge objects exist already. |
Customer Success Studio
CoE Best Practice: Creating a Newsletter

Who will receive the newsletter?
Who will manage and produce the newsletter?
How often will you send it out?
How will you format the newsletter?

* We recommend a monthly cadence.

What to include in the Newsletter

- Calendar of events, such as workshops
- Announcements
- Platform and user stats, such as total number of users
- Splunk showcase and use case highlights
- Tips and tricks
- Important links
- Important messages, such as maintenance updates

**Important**

Upgrade: Splunk Platform will not be available 9/12 12AM-3AM

- New Splunk Power User Training available 10/1
- New IT Data & Security Ready for Search. See details [here](#).
- New Splunk Stream App available. See details [here](#).

Splunk Links
- Community Portal
- Splunk user Training Welcome Page
- Splunk Education Programs

New Risk Assessment

Security Posture Improvements

Splunk Help Desk
1. Open Support Case Report
2. Known Issues
3. Submit a Request

Coming Soon
- How to Use Splunk eLearning Tool
- Setting Up Your Splunk Online
- Splunk Self Help Tools
- Navigating Splunk Tutorials

Thanks for reviewing the 7th issue of the Splunk Newsletter. Questions or comments please contact the Splunk CoE Lead.
Questions?

Don't forget to rate this session in the .conf2017 mobile app