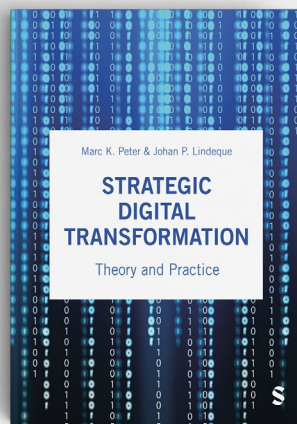


CASE STUDY COLLECTION

IT portfolio management and corporate knowledge – Colloquial enterprise architecture management



Luke Houghton

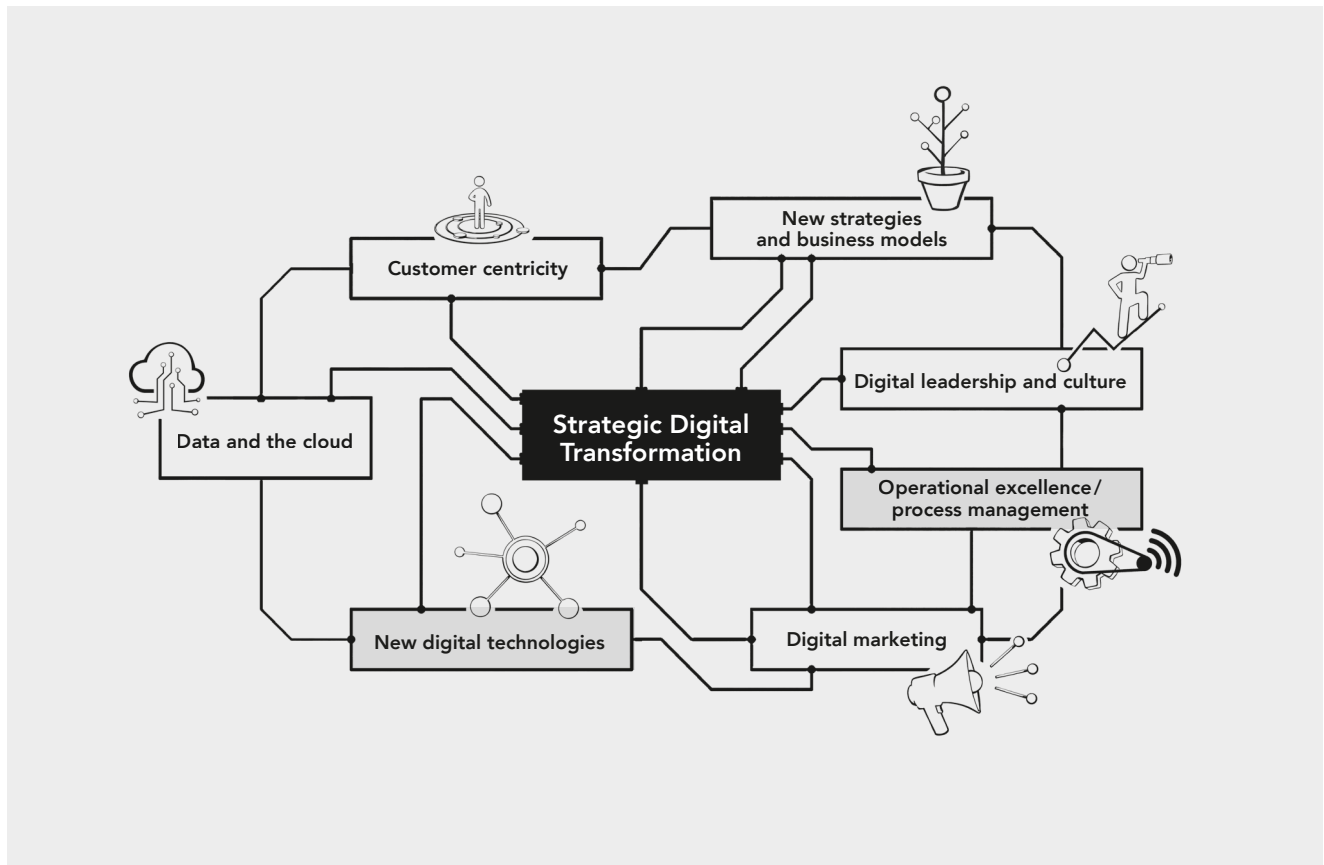


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IT PORTFOLIO MANAGEMENT AND CORPORATE KNOWLEDGE – COLLOQUIAL ENTERPRISE ARCHITECTURE MANAGEMENT

Case organisation profile

- **Organisation name:** Colloquial Solutions Pty Ltd
- **Country:** Australia
- **Description:** Colloquial is an IT enterprise architecture tool that makes it easy to capture, visualise and maintain business knowledge
- **Number of employees:** 3
- **Website:** www.colloquial.io



The Colloquial case study primarily covers the action fields of 'new digital technologies' and 'operational excellence / process management'.

Background information and challenges

Most businesses are aware that they have software applications, and they may even know they have a variety of programs in their portfolio. However, they often don't know if these applications are being used effectively or how they are being used in the current environment. As we enter an era of small, low-cost software applications, many leaders in organisations rely on bespoke applications that aren't part of the approved software suite. The enterprise architecture of a business usually serves as the technological framework that powers the entire organisation – from transaction software at the point of sale to customer relationship management software and various other technologies that keep the organisation running.

This collection of applications and software is often referred to as a portfolio. In some tightly run organisations, this might consist of just one large software package. In reality, however, a portfolio may include 20 to 30 software solutions/apps in small enterprises and hundreds or even thousands of apps in larger organisations.

The challenge of managing this growing group of software applications has been a focus of the field for years. You can't simply stop the flood of new software or the increasing use of artificial intelligence. Every day, more helpful apps find their way into corporations, many on a monthly subscription basis. Often, these apps are part of the portfolio but are only used occasionally, yet the cost continues even when they are no longer in active use. An Australian-owned business called Colloquial has tackled this problem, along with other enterprise-related challenges.

Strategic activities to develop a digital transformation strategy

Colloquial is a business architecture tool designed to streamline information management by leveraging cumulative organisational knowledge. It enables organisations to collect, maintain and analyse important data through customisable 'Fact Cards'. These Fact Cards represent key elements within a business, such as applications, stakeholders, processes and technologies. Users can bulk import inventory from XLSX files or manually input the information.

A key feature of Colloquial is its ability to crowdsource knowledge, allowing team members to update and access data directly through Microsoft Teams. Users can customise Fact Cards or use templates to track various metrics, such as application security, stakeholder roles and contract expiration. Each Fact Card can be assigned a data quality target and trust period to ensure data integrity.

Colloquial provides detailed visualisations of portfolios, highlighting risks, misalignments and opportunities for improvement. The app integrates best practices from established frameworks like TBM (Technology Business Management), TO-GAF (The Open Group Architecture Framework) and APQC (American Productivity & Quality Center), organising and visualising information through Fact Card groups.

Furthermore, Colloquial allows businesses to customise data views using tags, helping them focus on Fact Cards that relate to specific projects, regulations or business lines. The platform is adaptable to different organisational needs and grows alongside the business. Fact Cards can track various data types, including single-choice assessments, multi-step evaluations, text fields, financial figures and links to important documents.

This app provides a user-friendly and scalable solution for portfolio management, enabling businesses to make informed decisions based on trusted, up-to-date data. By providing an overview of a company's information landscape, Colloquial helps organisations identify inefficiencies and potential areas for improvement.

The screenshot displays the Colloquial website interface. The header includes the Colloquial logo, navigation links for Platform, Services, Pricing, Meet Us, and Login, and a 'Book a Chat' button. The main content area features the headline 'Start simple. Finish strong.' and a sub-headline 'Start your Enterprise Architecture, the easy way.' Below this, a paragraph describes Colloquial as a powerful and affordable Enterprise Architecture tool. A call to action 'Ready to save time, improve decision-making and reduce risks?' is followed by two buttons: 'Find out how we do it' and 'Book a demo'.

The right side of the screenshot shows a sample 'App Fact Card' for 'Quick Brown Fox'. The card is titled 'APP FACT CARD Quick Brown Fox' and includes a 'Used for' field set to 'Platform Delivery'. It features a 'Tags' section with 'S027001', 'Cloud migration', and 'USA'. The 'Details' section lists 'Cost Centre' as 'CC-1218' and 'SSL Renewal' as '14 April 2024'. The 'Assessments' section includes 'Deployment type' (On-premise), 'Sourcing' (Commercial Off The Shelf), 'Accessibility Compliance' (Level AA Review), 'Identity Security' (SSO using SAML), and 'Investment Lifecycle' (Contain Review). The 'Links' section is also visible.

At the bottom of the website, a footer states 'Helping organisations everywhere to shape their future' and lists several partner logos: Calvary Cancer Research, boldyn, WEMAG, Calvary, nib, bnl communications, and UNSW College.

Example of a Fact Card (Colloquial, 2024).

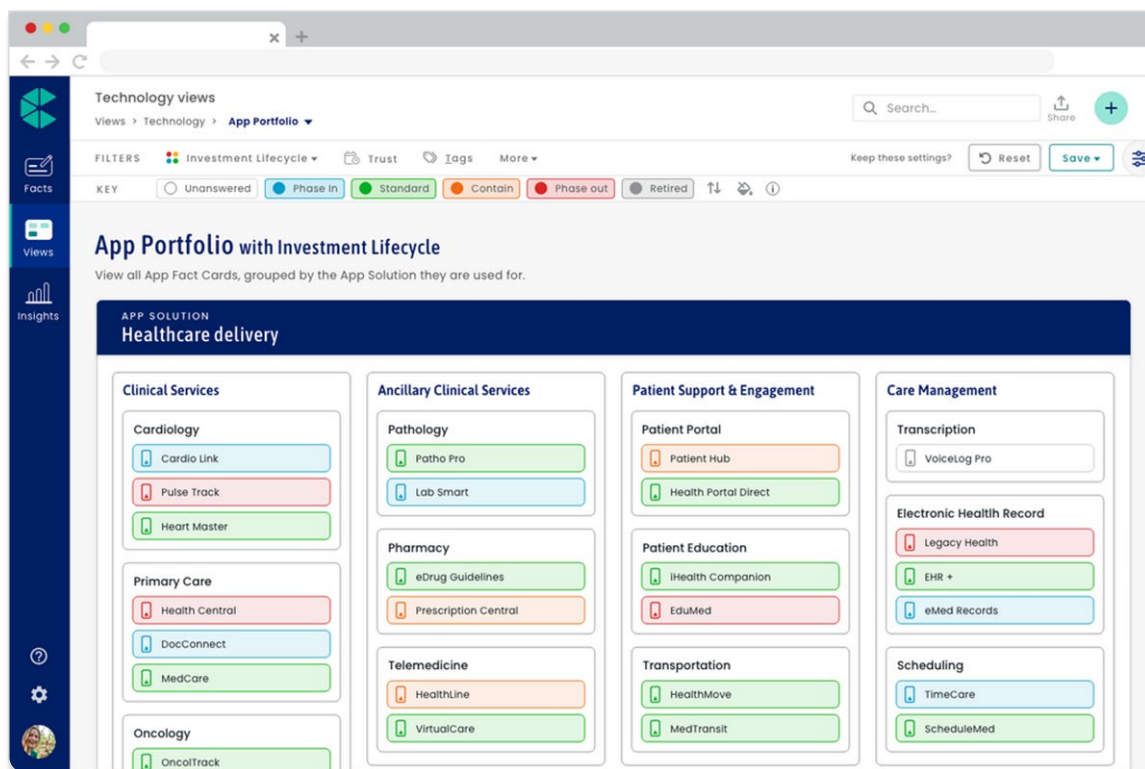
Concrete strategic digital initiatives and projects

Colloquial offers innovative tools for managing business information. Its architecture-centric approach helps organisations harness collective knowledge, maintain up-to-date data and make informed investment decisions. The platform is flexible, easy to use and integrates with common communication tools like Microsoft Teams, facilitating seamless collaboration across teams.

The platform is ideal for businesses looking to streamline their portfolio management and decision-making processes. Colloquial enables companies to track and organise their capabilities, processes and technology infrastructures while providing detailed insights into potential risks and growth opportunities.

The core idea behind the platform emerged while one of the co-founders was working at an insurance company and found it difficult to track and analyse the apps being used and their importance. Instead of creating a local digital transformation solution, the company built an integrated strategic tool that mapped all the apps across the enterprise and rated their importance. The result was a cloud-hosted app that collects and stores information on the various information management tools in use across the enterprise. This meta-model transforms the cumbersome process of manually searching through networks for each app and instead allows for centralised analysis.

The app promotes the use of a tool called Insight, which is part of the Fact Card system. It moves the organisation from a difficult and often neglected method of measuring and managing applications to a streamlined, central location where apps can be assessed for the value they bring to the organisation.



Example of Colloquial's Application Portfolio Management Dashboard (Colloquial, 2024).

Advantages and disadvantages of the current digital strategy

Colloquial's approach to digital transformation offers several advantages but it also presents challenges. On the plus side, it provides a robust framework for understanding how software across the organisation is being used and the benefits it brings. This is an innovation in an industry that has long struggled to provide clear estimates of the value of applications.

However, this also represents the company's biggest challenge. Selling these applications to overworked executives, who may not immediately understand their value, can be difficult. The technology was built to provide transformative insights but, to achieve this, the company must educate clients on the benefits of the platform, often through personalised interactions.

Preparing employees and customers for the digital strategy

Colloquial spends considerable time with prospective clients, demonstrating how the tool can be used immediately. When engaging with clients, they prioritise personal interaction, whether in person or online, over impersonal sales calls. This approach allows the company to demonstrate the specific value the software can provide, making the process more personal and tailored to each client's needs.

Colloquial also maintains a strong connection with its clients by fostering a community of users who provide updates and offer personal support, ensuring a lasting relationship.

Lessons from digital transformation

Digital transformation is about the harmony between people and technology. The app was designed to create synergy between strategic leaders and operational staff. The first lesson learned from the digital transformation is that technology and people, working together, can create value when an application is designed to facilitate that collaboration.

The second important lesson is that digital transformation is about providing new ideas, not merely implementing new software. It requires understanding the value of the technology being used and why it is necessary.



Chris Haskett
CEO



Adam Parnell
Director of Product & Sales



Steve Bell
CTO

The company founders (Colloquial, 2024).

Recommendations for organisations and students on digital transformation

Think strategically. Consider how digital tools can add value and make work easier for everyone involved. The goal at Colloquial was to simplify the management of an organisation's portfolio of apps, saving money and empowering people to understand the tools they are using.

Digital transformation is not just about adopting the latest technology. It's about making changes to existing processes to improve efficiency and create value. Always consider how digital tools can enhance customer experiences and improve employee satisfaction.

Student questions

Discuss the following questions in your class, in your group or assignment:

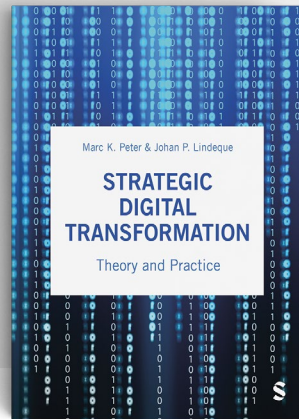
1. How can an organisation identify and document technology innovations?
2. How would you structure the IT/technology portfolio of an organisation?
3. Why is it important to plan, document and maintain an enterprise architecture?
4. What risks arise from the uncontrolled purchase/use of apps in an organisation?
5. As a corporate leader, how would you manage and control the use of IT solutions (e.g. avoid that employees instal their own apps on laptops)?
6. How can IT tools/apps help you to collect and utilise corporate knowledge?
7. How do collaboration tools such as Microsoft Teams contribute to knowledge management?
8. Why do organisations link their IT strategies to frameworks such as APQC, TBM or TOGAF?

Further information

- APQC's Process Classification Framework (PCF): www.apqc.org/process-frameworks
- Colloquial Solutions: www.colloquial.io
- Microsoft Teams: www.microsoft.com/en-au/microsoft-teams/group-chat-software
- TBM Council: www.tbmcouncil.org/learn-tbm/what-is-tbm
- TOGAF Standard (Open Group): www.opengroup.org/togaf

Acknowledgements and authorisation

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