

How to Win Friends and Influence Platforms: Solving Non-Technical Challenges of SAS® Estates

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ABSTRACT

Managing SAS® platforms in big organisations, you face some unique non-technical challenges, especially when you are serving many different departments. Few other tools offer the connectivity SAS does, and few are so widely used by people across the business. With new data storage types, new server environments like the cloud, and new versions of SAS arriving seemingly every month, leaders and SAS administrators find themselves at the heart of a tangled knot where each department is pulling their own thread to get data and insight relevant to them with ever bigger and more varied asks.

At Royal Bank of Scotland (RBS), our SAS® 9.4M5 platform with SAS® Visual Analytics, which we call Genie, has 16,000 users, 1500 of which manufacture data for SAS Visual Analytics reports, run complex models and provide in-the-moment analysis. The user base represents almost every area of our company, and everyone from Commercial Banking to Human Resources has a stake in Genie and they all want different things.

In this sort of environment, how do our SAS administrators and business leaders make sure we are all pulling together and headed in the right direction? It isn't simple, and the days when a SAS administrator was just the techy in the basement are long gone. To manage today's large SAS platforms, it is necessary to have a strategy for collaboration lead by the administrators helping them keep their finger on the pulse of the business.

INTRODUCTION

As SAS Platform administrators it is completely natural that we spend almost all our working hours consumed with thoughts of library builds, security model alterations or that one file system that keeps filling up for some reason. Indeed, it is a job full of technical problems for which technical solutions must be found. Much of this work is self-generating whether in a positive sense, such as a brilliant new housekeeping script you want to implement, or negative sense like the aforementioned file system.

Not all of it is self-generating, however. A great deal of the work we as SAS administrators are expected to perform comes from our colleagues who want us to deliver rafts of change. Alter the security model, accommodate changes to table structures, and release the latest SAS version with new features and all without any business impact, naturally. It often seems that our colleagues each have their own agenda, an agenda seemingly lacking any understanding or appreciation for what needs to be done to complete the task.

Of course this sort of thinking with regard to "The Users" or "The Business" may well shock them to read, or perhaps, more depressingly confirm their suspicions that this is what SAS administrators think of them all along.

It is exactly this sort of relationship which all too many of us in the SAS community find ourselves in. This paper does not outline any particular technical solution, but rather attempts to convey a way of working which has proven effective and to which I am now passionately committed. Whilst some of this may only be possible to achieve if you work in a team of administrators the vast majority could be adopted or adapted by a single person working alone.

THE NECESSITY

At The Royal Bank of Scotland we have a number of different SAS Platforms of different versions, different support teams and very different work load types which has bred very different support and use philosophies. Some produce critical regulatory returns, which fosters regimented user communities who have come to understand the importance of cooperating and taking instruction. Others, particularly Genie (a platform which we are proud of and has featured in many SAS Forum papers before) is significantly more laissez-faire by design. Conceived as a SAS® Visual Analytics focused platform it would be left largely to the business to interpret some operating patterns and let loose visualizing our big data for all to see.

This sounds rather wonderful, with a repeatable cookie-cutter play pen for each business area, separated from the next by the security model to maintain separation. They have their own Data Administrators who can set up libraries and batches so there is no need to wait for the Platform Administrator to get around to performing these tasks. Instead, as the Platform Administrator you can spend your time working to deliver proactive strategic improvements such as moving to the latest SAS versions whilst also allowing you to effectively assist users and respond rapidly to any incidents which may occur.

This idyllic era will not last long however and soon you will be fielding questions arising from well-intentioned googling by the business.

With a ratio of over 200 Data Administrators for every one of our seven Application Support team members the sheer volume of work quickly becomes overwhelming. Indeed it became so for my team and I, and as the saying goes, necessity is the mother of invention and drove out a methodology which is explained in this paper.

WITHIN THE BUSINESS

In order to begin the build up of this methodology you will want to be careful to approach the implementation in a way which delivers early quick wins for the business. This is important as they will want to see progress and deliverables in order to establish in their mind the value being added, but they will also be significantly more on-board if they are a more integral part of the journey.

HOLD A WEEKLY SURGERY

What is it?

Implementing a weekly session was the first major breakthrough we had in clawing back time and getting people throughout the business engaging with the administration team and contributing to the SAS community at RBS. At this weekly session you will be able to bring together technically knowledgeable people from your user base and give them a forum to discuss with you, and each other, their desires for improvement as well any their frustrations with your current set up on the platform. This session further gives you fantastic opportunity to be open and honest with them about the difficulties you face in delivering what they are asking for, reasons for delays, etc.

How does it help?

The biggest positive outcome from this session is improved trust that the business will put in you to deliver. Having an open forum for you to talk about the reasons why deliveries are difficult will give them a window into how challenging the role platform administrators play is. The vice versa is also true. You will find that hearing their challenges will help to prioritize the requests coming in. Indeed, where prioritization is concerned it gives you an opportunity to let the user community decide what is most important this week and what

should be delivered. Is it that set of new database connections for Commercial or is the new security pattern for Personal Banking most pressing.

What is more, often the attendees at this meeting will have great ideas and often the technical knowledge to try it. This can be a great time saver as you can push development of changes which could benefit everyone outwards so that you only need to peer-check. For example our users grew frustrated at the time it took to reload data to LASR after an outage and suggested my team develop a macro they could use. Knowing that the user making this observation was capable of developing such a macro himself, we asked him to develop one. My team was able to test it and make that available to all 1,500 of our Data Administrators. Not only is this macro a great time saver, but demonstrated the effectiveness of this type of collective development of improvements.

The other big win here is the administrators time. If you have even just two stakeholders the time spent giving progress updates on what are often the same subjects will be half. The more stakeholders you have, the bigger the win.

What to watch out for?

As a general rule you'll want to cover:

- Anything new which has come up since last time, be it defects or requests.
- Give updates on your progress since the previous session.
- Review the back log you'll be keeping of requested work not yet in progress.

It is very important to keep this group as a technical one. Encourage attendees to update their managers with the output but do discourage their attendance. It is comparatively easy to ask for favours, help and be more frank with each other in a more informal environment.

If you do continue to be asked for updates outside of this session, invite people along. Having a surgery like this should cover off most things and this way you protect your time.

OPENING A CONSULTANCY

What is it?

Having significantly reduced the amount of time you are spending giving updates to your more vocal users, it is wise to look at spending some of that time with your less experienced colleagues. Frequently as a SAS administrator you will be asked many questions or need to fight emerging fires, often from people who lack a support network in their own business team. Traditionally when lacking time or resource a common response would be to ask them to search the answers for themselves or take a training course.

Become a consultant for these people where you can, and where you believe you can make a valuable impact. This impact can be even greater if you make use of the SAS Environment Manager and other platform data to identify poor practice to focus on.

Sometimes of course you will not have the time, or believe the situation truly is simple enough to not require your help. Remember there are usually highly knowledgeable people in your user base, such as those involved in the surgery. Bring people together if you know that that could be the easiest route for a certain case.

The last part to this consultancy is to publish! Whatever medium you or your company prefers will suffice whether on an intranet or an internal wiki. Any email you write to explain something to somebody more than once would be time wasted. The second time around you can just link to the article and with time people will begin to search for answers themselves.

How does it help?

Firstly, the value to your company could be enormous. You will help improve the overall efficiency of your company's SAS community and that cannot be understated.

Secondly, however, it is important to think about how problems start. Horrible batch processes and flaky Visual Analytics reports are often down to a lack of understanding or appreciation of the tools and its capabilities from those using it. By being an adviser to less knowledgeable colleagues, not only will your business be more efficient but you will find significantly fewer issues and subsequently many fewer issues or defects raised against your platform, which would have otherwise turned out to be user error.

In our team we have successfully helped a number of business teams put together some rather complex batch processes. Without our consultancy not only would the business have been less effective, but they would have believed the platform less capable than it is.

What to watch out for?

It is wise to maintain a "self help first" policy whether that is asking the users to research or ask their own colleagues for advice. After all the aim here is to save time and free yourself up. There are some fantastic resources out there, in particular SAS Communities to help people research and learn from industry peers.

Also, it is very important to keep your wiki up-to-date. Server names can change, upgrades do happen and thus an out-of-date wiki will only exacerbate the problem.

COFFEE WITH THE BIG SHOTS

What is it?

The easiest way to become known for being helpful.

By having a regular session with each of the different department leaders (or as close on the hierarchy as you can manage) will give you fantastic insight and opportunity to think about what you can do to help or be ready before things are imminent.

How does it help?

Being ready for business change is the best thing you can do to be viewed as helpful. Not only that, but the opposite leaves you at risk of seeming like an anchor holding your company back.

For a moment imagine the difference in being able to plan the setting up of connections to a newly built data warehouses or having plenty of time to draw up some changes to your security model. Compare this to the traditional experience of being blindsided and told that this project delivery will be going red without this change happening now.

The quality of work can be improved and the stress level much reduced.

What to watch for?

This is the phase my team and I are currently in so sharing the learning on this on is tricky. So far we have been able to see and get ahead of the business's desire to use more open source programming and have been able to set in motion projects of our own to enable R and Python on our SAS platform. This has been viewed as very beneficial and helpful to the business.

WITHIN TECHNOLOGY

Being in tune with the business is extremely important, but you will still find yourself unable to deliver a full set of benefits to them without the help of the Technology team. Whether your organisation has a one-man band or a sprawling empire labelled as Technology, being on great terms with them and keeping them as in the loop as possible will pay dividends when trying to progress your agenda.

THE MONDAY MORNING MEETING

What is it?

This is the perfect opportunity to look ahead and set your goals for the week. Sit down (or have a stand up, if that is more your speed) and talk through what you will need people to do for you, particularly from other teams. In my meetings I have the head and the technical lead of my counterpart team which manages our Unix servers and SAS installation on the behalf of my team, as well as our application designer who can provide steer on new ideas.

Why does it work?

Firstly, by being one of the first appointments in the diary each week you'll be able to leverage any free space people might have to deliver the things you need. Perhaps less obviously it gives you a much enhanced ability to start the week with all the facts you might need such as what is progressing well and what you would like them to prioritize. But it also gives you more insight to allow you to plan better yourself. For example, if a change you have promised for Saturday night is unlikely to go ahead for whatever reason you are able to let the business know in a more timely fashion.

By being clear on what can be delivered and when, you will be able to be a better business partner to your colleagues and give them great updates.

What to watch for?

In my experience of working this way over the last year the most important thing to be during these conversations is; understanding. It is all too easy to revert to asking the earth of already stretched teams. By acting in this way and being mindful of what is possible for your colleagues to deliver I found that when times of need do arise, they will go that extra mile as they understand I really do mean it when I say it is urgent.

SAS PREMIUM SUPPORT

What is it?

The SAS website covers all the ins and outs of exactly what is included, but what SAS Premium Support really boils down to is essentially adding highly knowledgeable and enthusiastic SAS resource to your team. A technical support account manager (TSAM) will make sure that you have access to all the right people in SAS and help keep you on the right track with things like solutions to problems you might be having with your platform such as hotfixing or proactive improvement work like version upgrade advice.

Why does it work?

Put simply by having a TSAM you automatically get a great extra perspective and set of eyes on any of your issues or opportunities. For a team like mine with a great set of highly technical individuals, we got great value out of asking very specific questions and having access, through the TSAM, to fantastic people from all over the SAS business.

The best thing overall though is the way that peers from SAS come to feel almost like part of your team.

What to watch for?

It is easy to think that your Technical Support from SAS will have all the answers. Of course they are highly knowledgeable but you need to be prepared to stay in the driving seat and manage the relationship with this resource like you would your own company's technology teams. To have a successful relationship with SAS Premium Support remember that you will have to prioritize and set the agenda to make sure you meet your own business' goals.

THE BENEFIT

Following this simple structure to manage and run the support of our SAS platform has delivered us great benefit. Over the past year we have increased the user numbers from around 6,500 to 16,000. At the same time the number of support tickets raised each month has dropped by around one third.

We also now have great relationships with all of our business stakeholders. They value us significantly more and us them, building the agenda together to deliver a SAS platform that works for the business and is straightforward to run and administer.

Technology are also happier with us as a support team. We work seamlessly without the need for awkwardly raising work request between each other meaning we can make positive change much faster. They trust our judgment more thanks to our openness and transparency and this means you can more easily get traction when you need it. Technology will see you doing less of "crying wolf".

CONCLUSION

There are of course just as many ways to run a SAS Support team in an organisation as there are for you to use SAS. The evidence is clear however that by working together and asking everyone involved in your platform to make vital contributions to your SAS community you can build an atmosphere of positivity where great progress can be made. Indeed, it is flattering to feel involved and once involved people will feel more invested. Having your business and technology colleagues invested in you and your platform's success is surely a positive outcome.

In his 1936 book *How to Win Friends and Influence People*, Dale Carnegie gave, amongst other things, some simple advice for a happy home life. Whilst I have nothing specific to share with you on that note, it probably would be true to say that working smarter by following this methodology, you do increase your chance of leaving the office by 5 pm and perhaps that is a start.

CONTACT INFORMATION

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