# From Chaos to Clarity:
## How Meta Set Up an Alteryx COE That Scaled Development by 3x

FINANCE INNOVATION HUB

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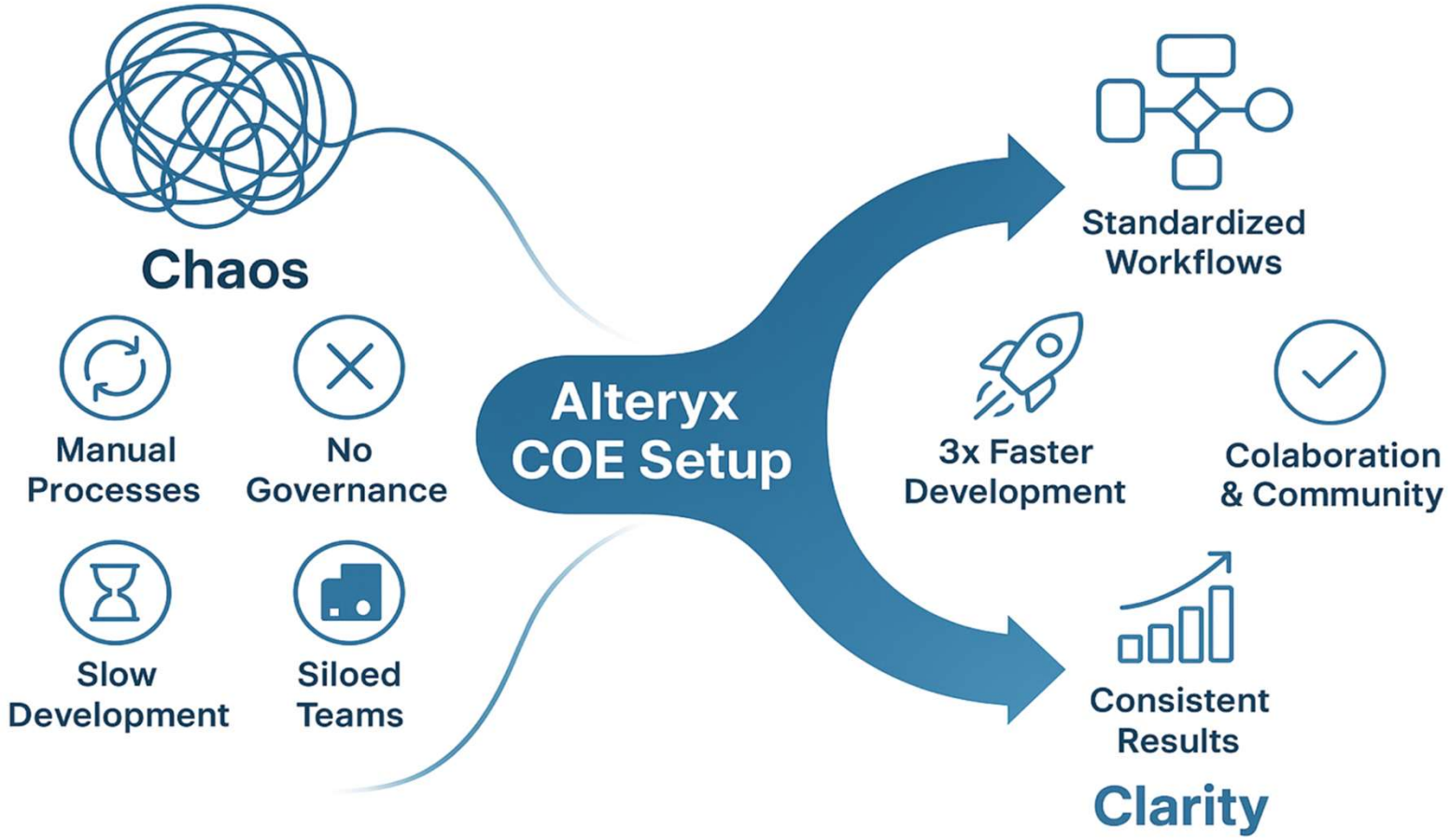
# Chaos to Clarity

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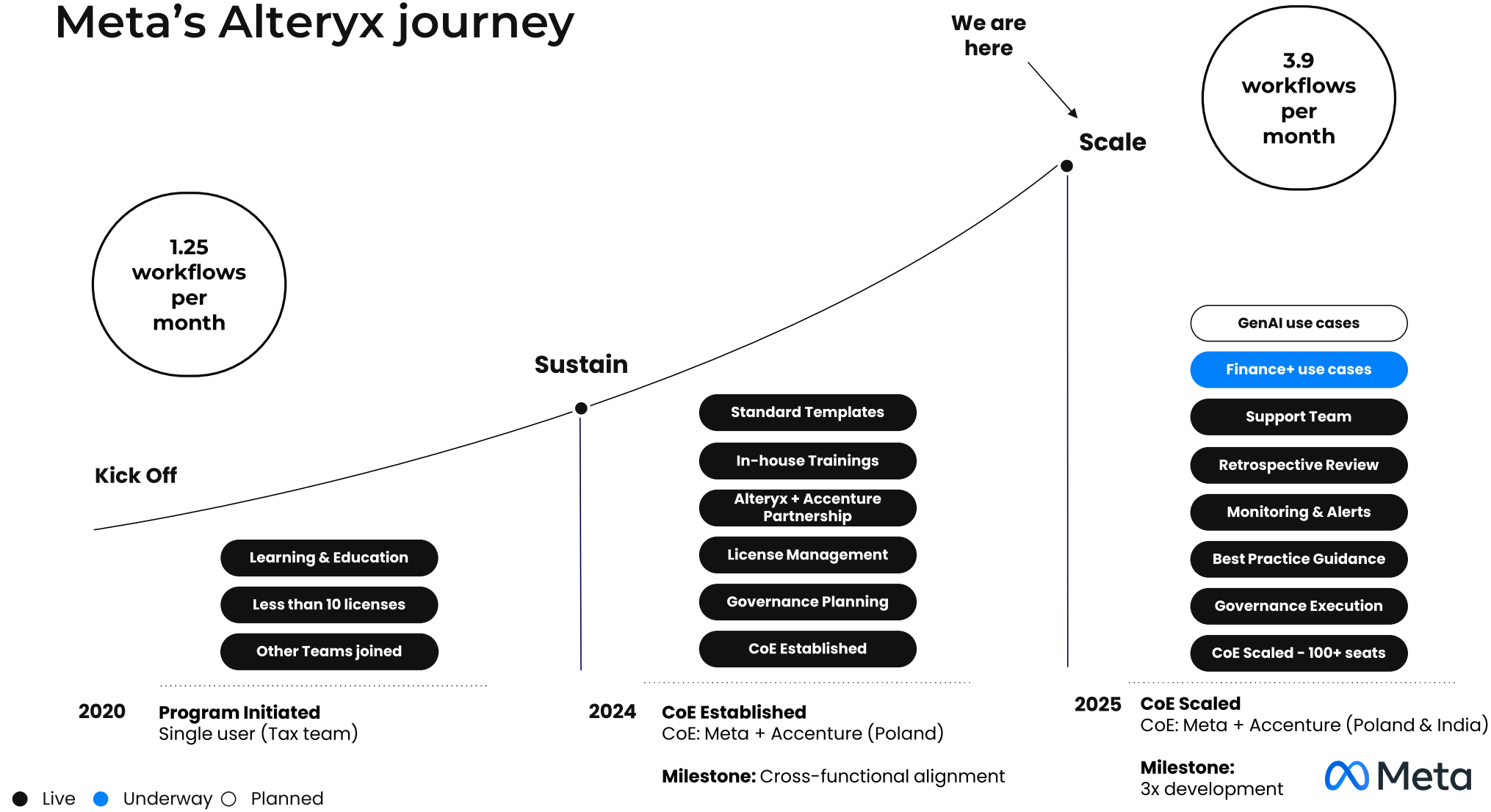
# Meta's Alteryx journey



# Meta’s Alteryx journey

## Dec 2023

**COE Established**

- Licensing: 5 different contracts combined into 1
- Standardized terms and conditions
- Single Product Team to manage all-things-Alteryx

## Mid 2024

**Governance Documentation**

- Started discussions with other teams on streamlining processes
- Governance related discussions
- Understanding governance teams at Alteryx
- Met with different teams working on Governance at Inspire 2024
- Internal stakeholder alignment
- Released Governance Documentation in August 2024

## Q4 2024

**Governance Implementation**

- Framework was ready
- Implementation: We brought in Alteryx along with our delivery partner Accenture to help implement the framework
- Delivered on all items by early 2025

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# Innovation Hub

**01**

### Centralized Command Center for Finance Innovation

A dedicated COE that manages all innovation efforts related to finance — from automation tools like Alteryx to process optimization, driving consistency, alignment, and strategic direction across teams.

**02**

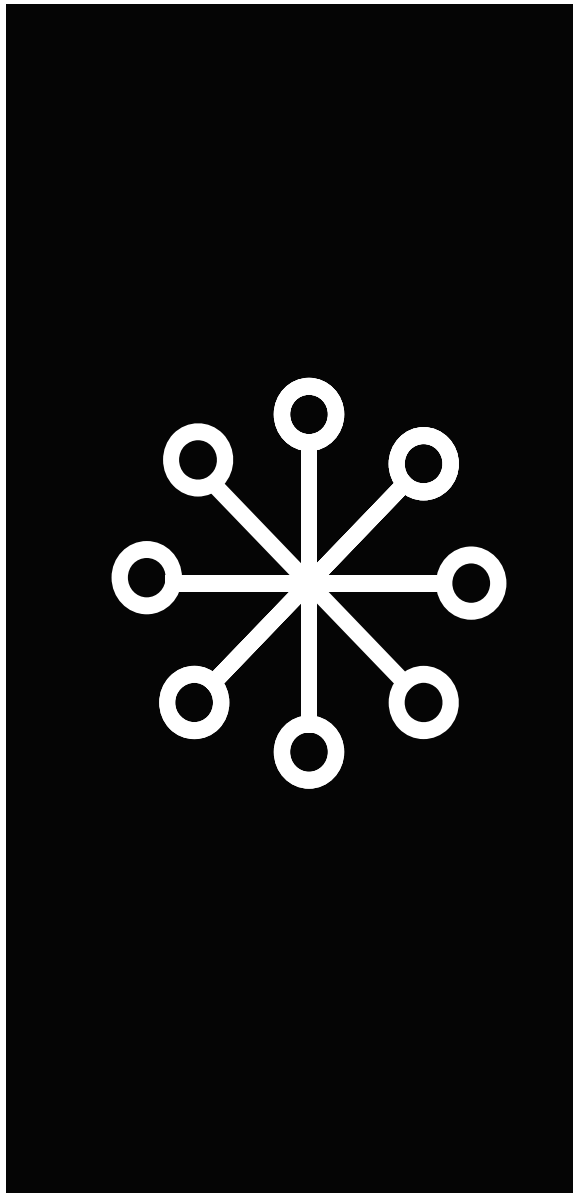
### Toolkit, Best Practices & Governance

Develops standardized toolkits to solve recurring business problems, defines best practices for automation, and implements governance frameworks that ensure quality, compliance, and data integrity.

**03**

### Monitoring, Alerts & Continuous Improvement

Provides proactive monitoring, automated alerts, and reporting on automation performance while fostering a culture of continuous learning, knowledge sharing, and scalable innovation.



# Governance

# Governance - Not Just Red Tape

- Peer Reviews
- Reusable macros
- Documentation standards
- Standardized Templates
- Naming conventions

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# Why Governance Matters: Building a Strong Foundation

## Risk Management

**Minimize Errors and Data Breaches:**
Identify potential risks early and implement controls to mitigate them, reducing the likelihood of errors and ensuring data integrity.

**Enhance Compliance:**
Governance ensures that all workflows adhere to regulatory and organizational standards, minimizing compliance risks.

## Consistency

**Reliable Outcomes:**
Governance provides a framework to ensure that all teams follow the same procedures, reducing variability and ensuring consistent output quality.

**Improved Collaboration:**
Consistent documentation practices lead to clarity, making it easier for teams to collaborate and for new members to get up to speed.

## Efficiency

**Faster Time-to-Market:**
A well-defined governance structure helps in streamlining processes, reducing redundancies, and improving overall efficiency.

**Resource Optimization:**
By defining roles and responsibilities, governance creates accountability, ensuring that each team member knows their specific duties.

## Transparency

**Enhanced Accountability:**
Governance ensures that all workflows are documented and traceable, making audit reviews more straightforward and less time-consuming.

**Better Decision-Making:**
Clear governance provides visibility into who did what and when, promoting transparency within the organization.

## Scalability

**Future-Proofing:**
As our organization grows, a solid governance framework ensures that processes remain scalable and adaptable to new challenges and opportunities.

**Sustainable Growth:**
Governance fosters a culture of continuous improvement, encouraging teams to regularly review and optimize their workflows.

# RACI for Alteryx Governance: Who Does What?

| | Developer | Champion / Reviewer | Subject Matter Expert (SME) | Center of Excellence | IT Infra | SOX (IA) / R&C |
|---|---|---|---|---|---|---|
| **Develop Workflow** | **R** A C I | R A **C** I | R **A** C I | R A C I | R A C I | R A C I |
| **Review Workflow** | R A C I | **R** A C I | R **A** C I | **R** **A** C I | **R** **A** C I | **R** **A** C I |
| **Input Risk Rating** | R A **C** I | **R** A C I | R **A** C I | R A C I | R A C I | R A C I |
| **Workflow Documentation** | **R** A C I | R A **C** I | R **A** C I | R A C **I** | R A C I | R A C I |
| **Workflow Approval** | R A C **I** | **R** A C I | R **A** C I | R A C **I** | R A C I | R A **C** I |
| **Workflow Deployment** | R A **C** I | R A C **I** | R A C **I** | R **A** C I | **R** A C I | R A C I |
| **Post Deployment Support** | R A **C** I | R A C **I** | R A C **I** | **R** **A** C I | R A **C** I | R A C I |

**R** Responsible **A** Accountable **C** Consulted **I** Informed

# Roles and Responsibilities

| Role | Responsibility |
|---|---|
| Alteryx Developer | Create, document, and maintain Alteryx workflows, ensuring compliance with governance guidelines. Collaborate with business units and optimize workflows. Must be using Meta issued licenses and be Alteryx Advanced certified |
| Alteryx Champion / Peer Reviewer | Alteryx subject matter expert within each functional team with sufficient capacity to define and drive requirements for Alteryx use. Must be Alteryx Designer Advanced Certified or working towards it. Should be Alteryx Advanced certified |
| Business Manager | Manager responsible for the review and attestation of completeness and accuracy of workflows |
| Center of Excellence | Lead governance activities, develop and enforce policies, align Alteryx usage with organizational goals, and facilitate governance and continued development of resources |
| IT | Manage Alteryx server environment, ensure system performance and security, implement updates, and develop backup and disaster recovery plans |
| SOX & Controls | Ensure compliance with policies and regulations, conduct regular reviews, develop procedures, and collaborate with legal and regulatory teams |

# Risk Tiering

Risk identification is a critical step in managing potential issues that could impact the accuracy and effectiveness of Alteryx workflows. This process involves evaluating several key factors to ensure a comprehensive understanding of the risks involved.

| Risk Factor | Criteria | Description |
|---|---|---|
| **Workflow Complexity** | Number of Tools | More tools can lead to a higher likelihood of misconfigurations and greater efforts for troubleshooting issues |
| | Data Transformation | More complex transformations are harder to troubleshoot, may require specialized expertise. which if not done right, can lead to error |
| **Data Risk** | Data Sensitivity | Leaking of classified or highly confidential data (DSS-3 or DSS-4) holds greater consequences compared to public or non-sensitive information |
| | Data Input | Unverified or real-time data streams pose a greater chance for error compared to established sources like databases |
| | Data Output | Writing directly to trusted sources others rely on such as databases and dashboards necessitates higher data scrutiny compared to outputting to offline files |
| **Regulatory Compliance** | Regulatory | Workflows that fall under regulatory compliance demand strict accuracy, data integrity, and adherence to standards, where errors or non-compliance can result in significant penalties or reputational damage. |

# Risk Tiering

## Risk Level Requirements:

- **Low Risk:** Routine monitoring and standard controls
- **Medium Risk:** Regular reviews and enhanced controls
- **High Risk:** Continuous oversight and comprehensive controls

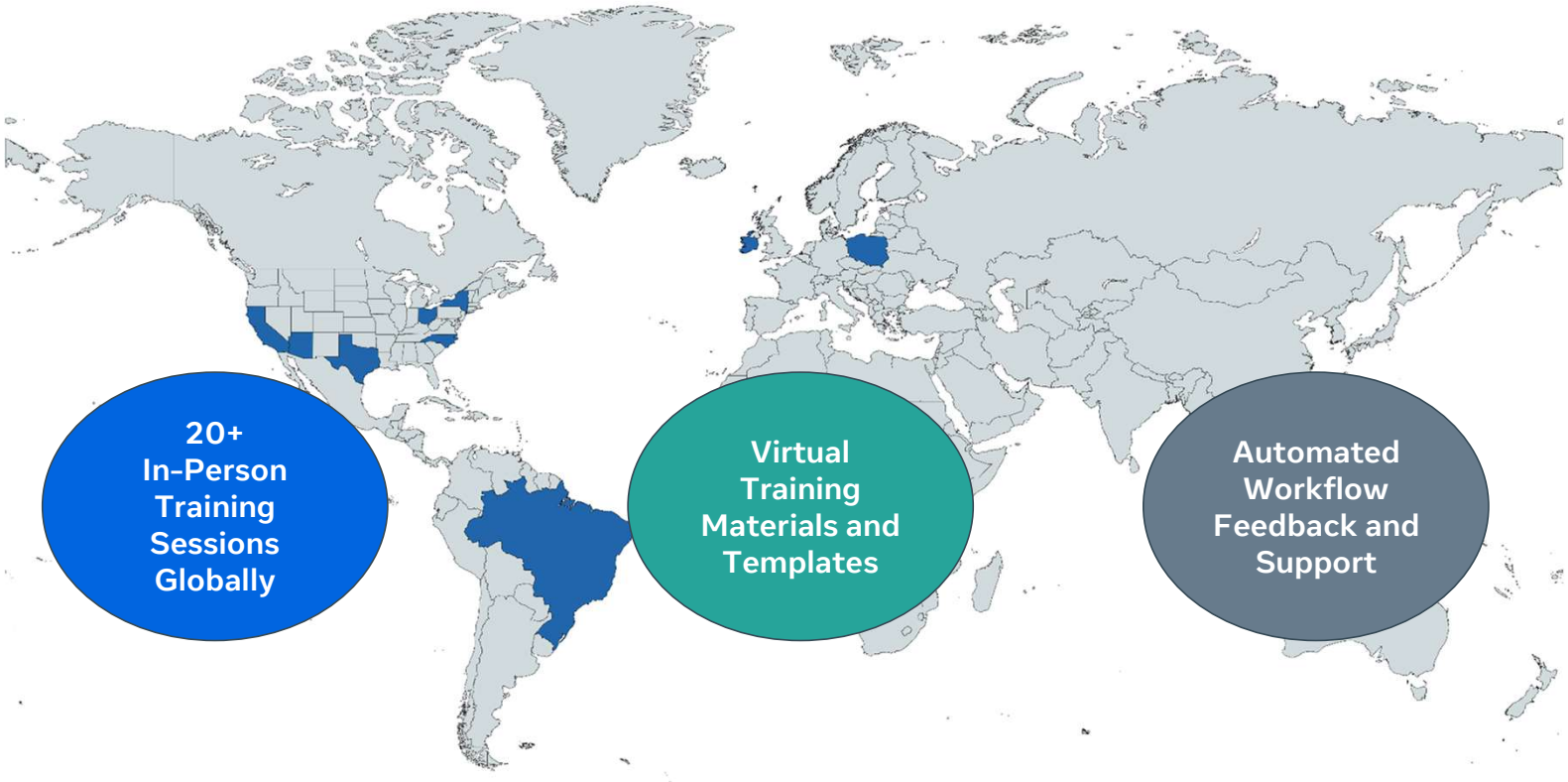
## Risk Tiering Scorecard

This template is designed to help assess the risk level of Alteryx projects based on four key factors: Project Complexity, Data Sensitivity, Stakeholder Impact, and Regulatory Compliance. Each factor includes specific criteria that must be evaluated and scored to determine the overall risk profile of the project.

| Key Factor | Criteria | Evaluation | Score (1-5)~ | Comments/ Notes |
|---|---|---|---|---|
| **Project Complexity** | Number of Joins | [ ] 1 [ ] 2-4 [ ] 5+ | | |
| | Type of Data Sources | [ ] Simple [ ] Intermediate [ ] Advanced | | |
| | Data Transformations | [ ] Basic [ ] Intermediate [ ] Advanced | | |
| **Data Sensitivity** | Data Types | [ ] Low [ ] Medium [ ] High | | |
| **Stakeholder Impact** | Criticality of Impact | [ ] Minor [ ] Medium [ ] Critical | | |
| | Visibility | [ ] Low [ ] Medium [ ] High | | |
| **Regulatory Compliance** | Compliance Requirements | [ ] Basic [ ] Detailed [ ] Stringent | | |

# Training

Implementing a comprehensive strategy ensures robust oversight and control throughout all stages of workflow development and execution

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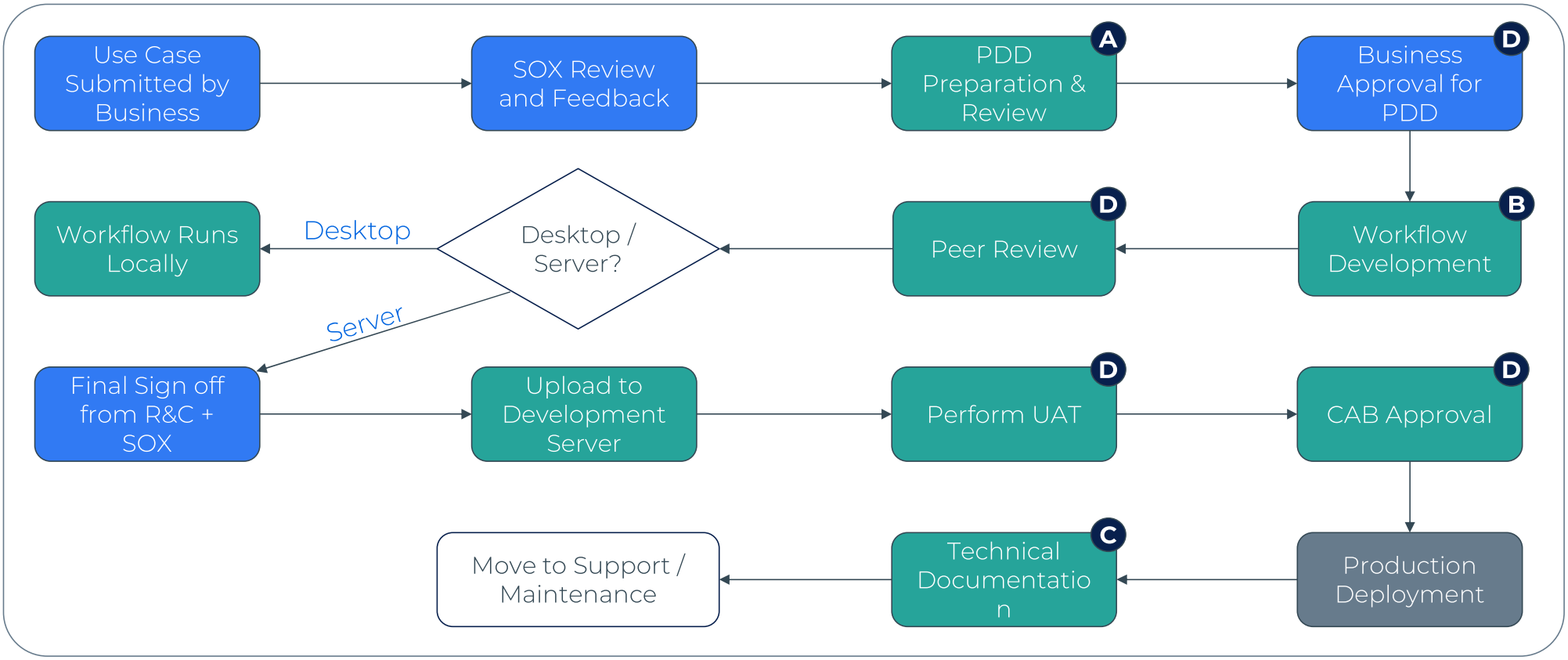
# Workflow Lifecycle



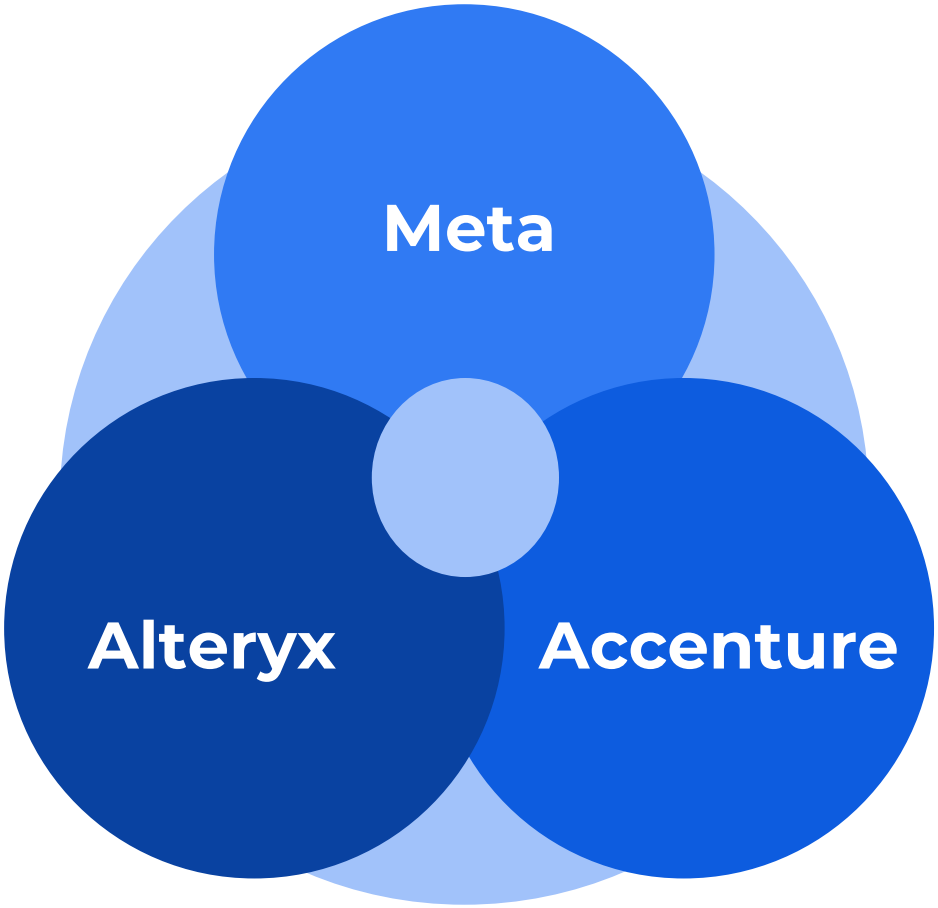

**Applied Asset:**

A) Process Design Documentation
B) Workflow Template
C) Solution Design Document
D) Task Management Template

- Business Team
- Development Team
- IT

# Execution

# Implementation – The Power of Partnerships




**Deliverable**

1. Reviewed 100+ existing workflows
2. Introduced Automated Workflow Checker
3. Standard templates created and implemented
4. Summary reports + measurable action items shared

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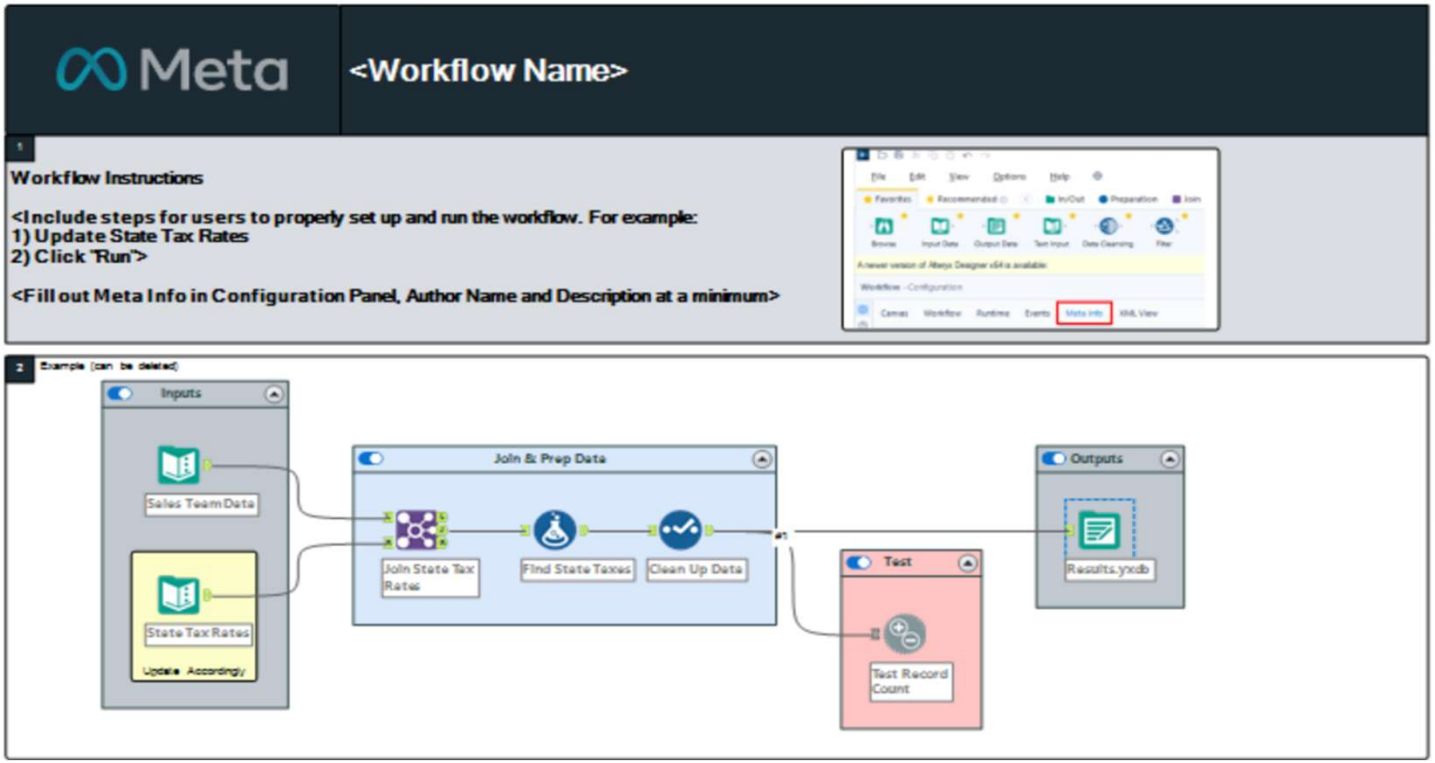
# Standardized Delivery

The COE ensures standardized best practices for Alteryx development by promoting consistent templates, naming conventions, and structured documentation, while implementing governance protocols like code reviews and audits to maintain quality, compliance, and alignment with business goals.




| Color Code Legend | |
|---|---|
| R=172, G=181, B=191<br>Inputs & Outputs | R=252, G=253, B=199<br>Tools needing configured/checked before run |
| R=255, G=176, B=176<br>Tests & Validation Checks | R=204, G=224, B=249<br>Joins, Data Prep |
| R=115, G=170, B=238<br>Interface Tools | R=230, G=217, B=204<br>Reporting Tools |

Table of Contents

1) Workflow Instructions
2) Example Workflow
3) Getting Started with the Template
4) Location of the SOP
5) Best Practices When Developing
6) Lessons Learned
7) Last Updated

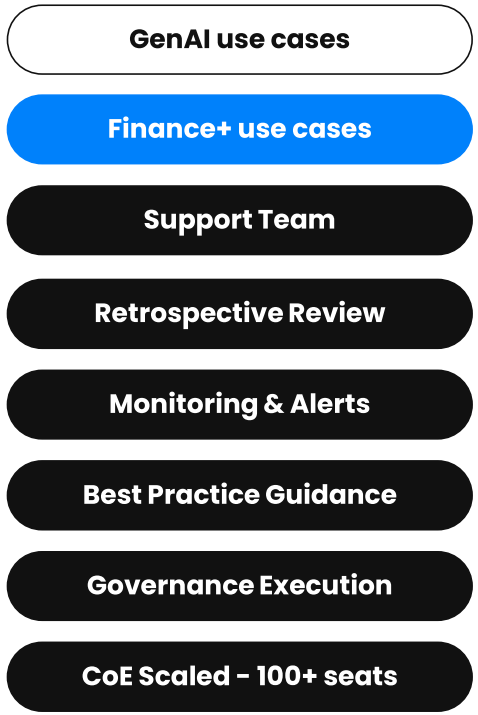
# 2025 & Beyond

# Meta's Alteryx journey

**2025**

**CoE Scaled**
CoE: Meta + Accenture

**Milestone:**
3x development

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# The Future Road map

### Automation & Self-Healing Workflows

Executive commitment to guarantee ongoing support & unlock budget

### Advanced Analytics & AI Integration

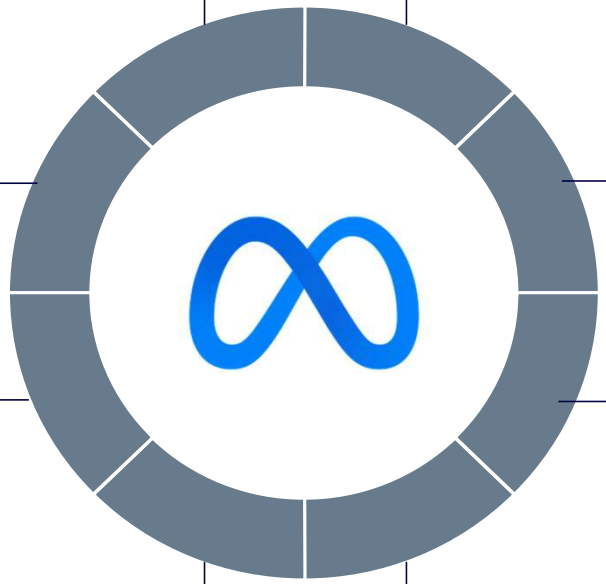
Business users fully enabled and owning the delivery of value opportunities

### Marketplace Model

Dedicated team in place to drive the adoption of Celonis

### Business Value Metrics & Storytelling

All users engaged and enabled in operational usage of Celonis with community established



### Data Governance & Compliance at Scale

Celonis tied to strategic objectives and internal programmes

### Cross-Platform Orchestration

Methods in place to discover, prioritize and measure opportunities based on value & complexity

### Developer Enablement 2.0

Real-time & permanent data availability with stable infrastructure

### Hyperautomation

Leveraging the breadth of Celonis solutions to find and fix inefficiencies across multiple processes

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# Q&A

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