

Business Architecture Innovation Summit – Day One (Tuesday, March 24, 2026)

Note: All times are listed in Eastern Time (EDT)

8:45 – 9:15 am | Welcome Address: State of the Practice 2026

Co-Chair: William Ulrich, President, TSG, Inc., Partner, Business Architecture Associates, President, Business Architecture Guild

Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Vice President and Co-Founder, Business Architecture Guild

Co-Chair: Mike Rosen, Wilton Consulting-Retired, Director and Co-Founder Emeritus, Business Architecture Guild

Abstract: During the opening session of the Summit, the Guild Co-Chairs will share exciting advancements across the global business architecture community over the past year. Topics include industry proliferation, successes and adoption, new industry reference models, standards advancements, tool evolution, academic updates, growing acceptance in strategy execution and exciting new directions for the year ahead.

Bio: William Ulrich is a management consultant, mentor, author and workshop leader. He is the President of TSG, Inc., President, and Co-founder of the Business Architecture Guild and Co-Chair of EDMA (formerly the OMG) Architecture-Driven Modernization Task Force. He is also a Principal Instructor at Business Architecture Associates, published author Certified Business Architect (CBA)[®] and serves on the Guild certification committee.

Bio: Whynde Kuehn is the Managing Director at S2E Transformation Inc. and a long-time practitioner, educator and thought leader. She is also Co-founder, Vice President, and Academic Committee Chair of the Business Architecture Guild, a Principal Instructor at Business Architecture Associates, a Fellow at the Institute for Digital Transformation, published author, Certified Business Architect (CBA)[®] and on the Guild certification committee.

Bio: Mike Rosen is Founder of Wilton Consulting (retired) and Co-founder, Director Emeritus, and former VP at the Business Architecture Guild[®]. As Guild cofounder, Mike was a major contributor to the business architecture foundational concepts articulated in the BIZBOK[®] Guide. In addition to his long consulting career and Guild contributions, Mike is a published author, had a career in software engineering, and has contributed to a number of industry standards. Mike is a Certified Business Architect (CBA)[®].

9:15 – 10:00 am | Breaking Down Silos: How Business Architecture Can Accelerate Transformation

Deepthi Murthy, Director Business Architecture & Analysis, First American

Abstract: Large, complex organizations with federated models face a common challenge: driving enterprise-wide transformation while navigating regulatory requirements, legacy systems, and organizational silos. Without a shared framework, opportunities for alignment and synergy are often missed. This session will present real-world use cases demonstrating how business architecture can inform strategic discussions and transformation initiatives within a federated environment, while also highlighting key lessons learned along the way.

Bio: Deepthi Murthy is a Certified Business Architect (CBA)[®] and transformation leader with over two decades of global experience spanning North America, Europe, and Asia. She currently heads the Strategic Analysis Group at First American Title Company, where she partners with business and

technology leaders to align strategy, technology, and operations in support of enterprise-wide transformation initiatives. Outside of her professional role, Deepthi is a proud mother of two children and a dog. She is a lifelong learner with a passion for creative pursuits, including art, and is deeply committed to mentoring and fostering the next generation of business architecture and business analysis leaders.

10:00 – 10:20 am | Break

10:20 – 11:05 am

Capabilities, Customers, and Clients, Oh My! Collaborating to Create a Business & Experience Architecture Practice

Paige Hill, Head of Business Architecture, MassMutual Life Insurance

Abstract: In the current competitive landscape, firms are increasingly focused on driving not just cost and workflow efficiencies but doing so while improving experiences for customers. During this session, we will discuss how MassMutual’s Business Architecture team leveraged the Business Architecture skillset and an innovative partnership with our Advisor/Client Experience function to reduce friction points, improve communication flows, and align technology with real customer needs across a \$44m Operations portfolio. With examples including leading end-to-end experience mapping exercises, innovative partnerships on “Day 2” road mapping for key technology rollouts, and enhancing focus areas for an MVP launch, this session will focus on both strategic learnings and actionable takeaways that allow Business Architects to imagine new ways of work that bring novel insights to business leaders looking to do more with less.

Bio: Paige Hill is the Head of Business Architecture for MassMutual Operations. In her current role, she spearheads architecture efforts focused on customer experience, end-to-end functional transformations, and leadership alignment. Before coming to MassMutual, she worked in strategic human capital at Johnson & Johnson and has 10 years of experience in the non-profit sector. She has an MBA from the University of Massachusetts Isenberg School of Management and a BA from Grinnell College. In her spare time, she bakes with your two young children and teaches upper-level Human Resources courses at the University of Massachusetts.

11:15 am – Noon

Designing Living Architectures: Bridging the Microcosm, Heritage and Change at the University of Cambridge

Elnaz Amani, Senior Business Architect, University of Cambridge

Abstract: The University of Cambridge presents a unique challenge to business architects: how can transformation occur within a centuries-old institution without eroding its academic identity or cultural heritage? Operating as both a global university and a city-scale ecosystem, Cambridge embodies a rare blend of tradition, innovation, and organizational complexity. Through an evolving business architecture initiative, the University is developing a living architecture—one capable of balancing stability with adaptability. By employing capability modeling, value stream mapping, and governance frameworks, Cambridge is establishing a shared language across strategy, operations, and academia. This approach bridges long-standing legacy structures with contemporary digital and organizational transformation needs. The presentation shares insights from this ongoing journey: how business architecture can simplify complexity, align diverse academic and administrative domains, and enable sustained transformation—not by disrupting heritage, but by designing with it.

Bio: Elnaz Amani is a business architecture professional and consultant specializing in strategy execution and organizational transformation through business architecture. Focus: Strategic and

enterprise-level business architecture practice, capability development, and business–IT alignment. Industries: Higher Education and Banking. Experience: Business Architecture Consultant, Enterprise Architect, and Advisor on strategy-to-execution transformation. Contributions: Contributor to Business Architecture Guild® initiatives, including the Metamodel and Industry Reference Models.

Noon – 1:00 pm | Lunch

1:00 – 1:45 pm | Adopting and Evolving a Reference Model in a Large Global Company

Pedro Alvarez, Business Architect, United Parcel Service, Inc.

Abstract: UPS first adopted the Transportation Reference Model in 2015 as a baseline for its business architecture practice. In the past 10 years, the UPS business architecture team transformed the TRM internally while also drawing from the other industry reference models to represent the organization's capabilities, value streams, and information. This presentation will explore how the world's largest delivery company applied all of the Guild's Reference Models as part of its business architecture, how they have evolved over the years, and the organization's increasing acceptance of the UPS Business Architecture framework.

Bio: Pedro Alvarez has 30 years of IT experience in business architecture, business systems analysis, and enterprise architecture. He manages UPS's enterprise-wide business architecture practice and the adoption of business architecture across the UPS's Technology Group (UTG).

1:55 – 2:40 pm | Clarifying the Complex through Business Capability Assessments

Jeff Strauss, Senior Business Architect, Thomson Reuters

Abstract: Business capability assessments are a powerful tool for making sense of operational complexity and guiding transformation. In this session, attendees will learn how to design and embed assessments that diagnose maturity, expose inefficiencies, and align stakeholders around future-state goals. Drawing from real-world assessments conducted in price optimization, contract lifecycle management, sales planning, go-to-market, and digital commerce, the session will offer practical strategies for building a repeatable assessment practice that informs technology decisions, shapes operating models, and drives enterprise-wide action. Participants will leave with actionable insights to strengthen their own architecture practices, helping their organizations know today, and navigate tomorrow.

Bio: Jeff Strauss is Senior Manager, Business Architecture at Thomson Reuters in Toronto. With a career spanning technology, SaaS, healthcare, and the public sector, Jeff brings a broad perspective to business architecture, specializing in simplifying complexity and enabling strategic transformation. At Thomson Reuters, Jeff supports the optimization of sales planning, go-to-market, and back-office processes through business capability maturity assessments and AI-powered transformation programs. He plays a key role in technology selection and the modernization of core business functions, helping to streamline operations and enable data-driven decision-making. Jeff's work enhances operational intelligence and supports leadership in prioritizing investments, ensuring that business architecture delivers measurable value across the organization.

2:40 – 3:05 pm | Break

3:05 – 3:50 pm | **Beg, Borrow, & Steal: A Value Stream Development Case Study**

Katherine Journey, Enterprise Business Architect, Point32Health

Abstract: A case study on how Business Architects at Point32Health encouraged the organization to develop, document and validate Value Streams, even though the Enterprise was convinced it did not want to. The practitioners embedded value stream development and validation within two different projects and assembled a team of interested coworkers who willingly stole moments between their own projects to participate and offer insight. This beg, borrow and steal approach allowed the Health Insurer to improve its baseline architecture without additional funding, which would not have been granted if the work had been a pure business architecture effort. This has positioned the organization to be able to articulate the value it creates and execute on its changing strategy, as it works to thrive in a volatile geopolitical environment.

Bio: Katherine Journey, Certified Business Architect (CBA)[®], has survived 30 years of Health Insurance, with roles in Operations, IT, project management, and Agile development. As her company's first business architect, she now guides strategic execution in Point32Health's Enterprise PMO. Katherine is also a poet, a nerd, and studies 16th-Century Persian and Mughal sword fighting, blending creativity with analytical insight.

4:00 – 5:00 pm | **Industry Reference Model Panel**

Panel Moderator: Ivan Blinov, President, BMASTER, Inc.

Abstract: The Business Architecture Guild[®] produces reference models for financial services, government, healthcare providers, insurance, manufacturing, transportation, telecommunications, and a generic common model. These models are built by Guild members from various industry sectors. This panel will discuss what is available, how they evolve, what the future holds, and what it is like to participate in one of these team efforts.

Bio: Ivan Blinov is a Business Transformation Architect and Certified Business Architect[®]. As a Business Transformation Architect, Ivan supports the use of organization knowledge and performance measures to provide the business leadership with effective innovations in IT and related oversight. Ivan holds a master's degree in computer science from Moscow Power Engineering Institute, an MBA from Virginia Tech, and a Stanford University Professional Certification in Innovation, and Entrepreneurship and Digital Transformation. He is a Certified Business Architect (CBA)[®].

5:00 – 5:15 pm | **Day 1 Wrap-up**

Co-Chair: William Ulrich, President, TSG, Inc., Partner, Business Architecture Associates, President, Business Architecture Guild

Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Vice President and Co-Founder, Business Architecture Guild

Co-Chair: Mike Rosen, Wilton Consulting-Retired, Director and Co-Founder Emeritus, Business Architecture Guild

Abstract: The Guild Co-Chairs will provide an update on available industry reference models and their levels of maturity and general industry utilization. They will additionally open the floor to discuss feedback and questions from InnovationSummit Day 1.

Business Architecture Innovation Summit – Day Two (Wednesday, March 25, 2026)

Note: All times are listed in Eastern Time (EDT)

9:00 – 9:15 am | Day Two Overview & Themes

Co-Chair: William Ulrich, President, TSG, Inc., Partner, Business Architecture Associates, President, Business Architecture Guild

Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Vice President and Co-Founder, Business Architecture Guild

Co-Chair: Mike Rosen, Wilton Consulting-Retired, Director and Co-Founder Emeritus, Business Architecture Guild

Abstract: The Guild Co-Chairs will provide an overview of day two along with themes for the day.

9:15 – 10:00 am | Beyond Efficiency: Architecting for Moments That Matter in the Age of AI

Linda Dogbe, Principal Business Architect, Navy Federal Credit Union

Abstract: In the age of artificial intelligence, business architecture can no longer be limited to aligning strategy with process and technology. It must be reframed to create meaningful human experiences. This session, subtitled *Reframing Enterprise Architecture Around Intent, Emotion, and Intelligence to Create Real-Time, Human-Centric Experiences*, explores the emerging discipline of experience architecture. Experience architecture embeds intent, emotion, and intelligence into enterprise design. Rather than optimizing solely for efficiency, organizations anticipate, sense, and respond to customer and employee needs in real time. The session examines how moments of truth, whether filing a claim after a crisis, onboarding for a new service, or navigating a critical escalation, are not accidental touchpoints, but architected outcomes shaped by design choices across systems and intelligence layers. Drawing from journey orchestration, AI-driven personalization, and value-stream alignment principles, this session demonstrates how to transform the enterprise from a system of record into a system of meaning. Business architects, uniquely positioned to lead this shift, curate journeys that resonate emotionally and position AI as a scalable enabler of trust and empathy. Success will no longer be measured by throughput alone, but by the ability to enable a moment that mattered, instilling confidence, loyalty, and empowerment. Participants will leave with a practical perspective on how to reframe architecture as a competitive differentiator, adopt experience-driven design principles, and measure outcomes not by transaction volume, but by the lasting meaning created in the lives of those we serve.

Bio: Linda Dogbe is a Principal Business Architect at Navy Federal Credit Union and Founder of Qavaa Innovate, a nonprofit advancing technology adoption through consulting, social projects, training, and scholarships. She has more than 15 years of experience spanning business-IT alignment, digital product design, and intelligent workflow integration. Linda holds a master's degree in management information systems and has completed executive education at the Massachusetts Institute of Technology (MIT) in artificial intelligence and its impact on business strategy. She combines this academic foundation with deep practical experience to explore how emerging technologies, particularly AI, can responsibly and effectively be architected into business ecosystems. Linda also champions digital literacy and access through scholarships, training, and community initiatives. She is a thought leader on business transformation and experience architecture, advocating for the integration of intent, emotion, and intelligence into organizational design, equipping business leaders to architect not only for efficiency, but for meaning and moments that truly matter.

10:00 – 10:20 am | Break

10:20 – 11:05 am | Strategy to Execution in the £314bn Government Organisation

Awani Gupta, Business Architect, UK Department for Work and Pensions

Abstract: The UK Department for Work and Pensions oversees welfare, pensions, and employment services to support people financially and promote work opportunities across the UK. It is the largest civil service department with 23 million customers, over 96,000 staff based in over 700 offices with a £11.4bn admin and £302bn program spend. Starting in 2022 the business architecture team started a strategy to execution journey. The focus was on the financial support value proposition with the development of the business motivation followed by an enterprise level end state design including the customer, people, organization, process and information domains. The presenters worked with strategic business planners to ensure that the 2030 strategy clearly articulated why the organization needed to transform, with a golden thread to the to-be architecture. The focus included repositioning the team from a digital to a transformational function, which increased the viability and demonstratable value of architectural thinking to senior leaders. In 2024, the presenters helped the Executive Team visualize the end state design and business benefits and challenges of executing the proposals. This effort led to the development of a single business delivery plan detailing key true enabling activities required across all operating model domains over the next 5-years leading up to 2030/31. The identified target identified a top-to-bottom, front-to-back transformation to deliver the department's ambition for modernized, customer-focused services.

Bio: Awani Gupta is Certified Business Architect (CBA) with 10+ years of experience in business architecture. With an overall career spanning 20+ years, she has worked across large private and public sector organisations specialising in Business Architecture, Business Analysis, Operating Models, and Enterprise Transformations. Awani has worked in domains like finance, energy, utilities, and central government developing a deep understanding of how a large and complex organisation works, the environment and culture it operates in and more importantly the people. Starting from a core technical and digital background as an electronics engineer (hons), software developer, project manager, technical architect, she's retrained in business design and made a shift in her career. Alongside technical qualifications in Java, DB2, TOGAF etc. and delivery experience on latest platforms like Salesforce and ServiceNow, Awani is also a lean/sig sigma green belt, certified scrum master with BCS business analysis diploma. Continuing my learning journey she is in the process of completing "Generative AI engineering" professional certificate with IBM.

11:15 am – noon | Leveraging Business Architecture for Strategy Execution through Efficient Program and Project Management

Adam Bajer, Lead Business Architect, Frontex

Abstract: The presentation will demonstrate the significant business benefits achieved by integrating business architecture with strategy and program/project management. It will provide the proven patterns for co-designing and co-managing these disciplines to ensure effective business solution delivery. The presentation will explore best practices for leveraging business architecture across all phases of program and project management: initiation, planning, execution, monitoring, and closing. During the initiation phase, it will be demonstrated how to connect business cases and project charters directly to business architecture elements. The approach ensures a comprehensive impact assessment across all strategic goals and objectives, value streams, capabilities, information, and

organization domains. The session will show how to embed capability-based planning into program/project plans and include practical examples using value streams, capabilities, information, and organization domains as a basis for structuring workstreams using common planning tools. The presentation will also provide practical methods for assessing capability performance to monitor the realization of work streams. The session will additionally illustrate how to leverage business architecture to conduct a comprehensive project risk assessment, ensuring that business risks are identified and managed as required. The session will also show how to embed project outcomes into operational business models. Finally, the session will demonstrate how the business architecture can serve as framework for assessing the impact and performance of the overall business strategy.

Bio: Adam Bajer is a Lead Business Architect with over 20 years of IT experience, specializing in business transformation through enterprise and business architecture. In his role at a major EU public administration agency, he aligns organizational strategy with user-centric business solutions. Adam is a passionate advocate for using enterprise design to enhance efficiency, ensure strategic alignment, and deliver real business value. Adam is a Certified Business Architect (CBA)[®].

Noon – 1:00 pm | Lunch

1:00 – 1:45 pm | Supporting Organizational Change Management Using Business Architecture

Kristen McCloskey Dexter, Enterprise Business Architect, FedEx

Abstract: The theme of this session focuses on “Strategic Alignment in Motion: Empowering Change Management through Business Architecture”. As organizations evolve their strategy formation and initiative development processes—often integrating agile frameworks—traditional organizational change management (OCM) practices can become sidelined. Yet, OCM remains a critical discipline for ensuring initiatives are adopted effectively and deliver lasting value. Business architecture, with its holistic view of the business and its role in the Strategy to Execution lifecycle, is uniquely positioned to support and enhance change management efforts. This session explores how business architecture can be leveraged to strengthen OCM practices, offering practical use cases and real-world examples that demonstrate how alignment between these disciplines can improve initiative outcomes and organizational readiness.

Bio: Kristen McCloskey Dexter is an Enterprise Business Architect at FedEx, where she helps drive transformation through the Strategy to Execution lifecycle. She co-leads the Business Architecture Community of Practice and collaborates across architecture teams to develop frameworks and standards that deliver strategic insights and support capability maturity.

1:55 – 2:40 pm | From Business Architecture to Digital Twin of an Organisation – The Future of Our Practice?

Dr. Terry Roach, Honorary Fellow, University of Technology Sydney

Abstract: Business architects are the connective tissue of change—linking strategy, operations, and technology. In a world of accelerating complexity and exponential change, business architects hold the keys to dynamic, continuous innovation if they can establish themselves as the custodians of operating model knowledge as a holistic, enduring, incrementally evolving digital asset.

This session will explain how we should do that, through the Digital Twin of an Organization (DTO): a dynamic, real-time model that reflects how an enterprise truly runs. More than a repository, the DTO serves as an analytical command center—leveraging capabilities and value streams as the building blocks of a DTO, to monitor performance, identify impacts, uncover inefficiencies, and simulate change before it happens. Discover how DTOs are transforming business architecture by enabling continuous insight, deeper alignment with strategic goals, and evidence-based decision-making across the organization.

Bio: Dr Terry Roach is an honorary fellow at the University of Technology in Sydney where he supervises PhD research in digital business modelling with agentic artificial intelligence. Based on his own PhD research in enterprise modeling, Terry founded and developed Capsifi, an innovative business architecture platform that was acquired by Orbus Software in 2024. Terry is a passionate advocate, academic researcher, and recognized thought leader in business modeling and business architecture. Terry has been a contributor to the Guild core metamodel standard and has served as a member of the IIBA global Board of Directors since 2020.

2:40– 3:05 pm | Break

3:05 – 3:50 pm | Business Architecture, Strategy, and AI: Leveraging AI and the Metamodel

Joseph Okonek, Director of Business Architecture, Globe Life, Inc.

Abstract: In today's rapidly evolving business landscape, organizations struggle to bridge the gap between strategic vision and executable action. Traditional planning approaches often fail because they lack the structural foundation needed to translate ambition into measurable outcomes. Business architecture provides that foundation by creating a holistic organizational blueprint that maps capabilities, value streams, and organizational units into a coherent strategy framework. When enhanced with AI-powered analytics, this approach transforms how we identify opportunities and execute strategic initiatives. The methodology begins with capability assessment—evaluating what your organization does against strategic criticality and competitive maturity. Cross-mapping these capabilities to strategic objectives reveals critical gaps and investment priorities. AI amplifies this analysis by processing vast amounts of organizational metadata to uncover hidden patterns and optimization opportunities. Through systematic gap analysis, we identify where organizational units lack initiatives supporting critical capabilities, creating targeted action plans. The framework enables precise resource allocation by connecting investments directly to measurable KPIs and strategic outcomes. We can explore practical templates and examples demonstrating how to leverage cross-maps, metadata analysis, and AI-enhanced insights to create executable strategy that drive sustainable competitive advantage.

Bio: Joseph Okonek's career began as an independent consultant, where he cut his teeth on ERP, CRM, and ITSM implementations across 20+ companies. Each engagement taught him something new about the intricate ways technology and business processes integrate, gradually expanding his focus from individual system integrations to understanding the broader ecosystem of enterprise business functions and technology. The turning point in his journey came when he accepted the challenge of implementing a large-scale GRC solution—a transformational project that would fundamentally change his career trajectory. This role positioned him to lead innovation committees and earn a seat on the IT Enterprise Architecture committee, where he discovered his true calling. His entrepreneurial spirit and change agent mindset found the perfect outlet when he transitioned into the role of Enterprise Transformation Analyst, where he could drive meaningful organizational change at scale. This experience ignited his passion for business architecture, leading him to take

ownership of developing critical meta models that would become the foundation for enterprise-wide transformation. As Director of Business Architecture, Principal, he's found his professional home—a role that combines all his experiences into a position where he can shape the strategic direction of how businesses architect their future. Joseph is a Certified Business Architect (CBA)[®].

4:00 – 5:00 pm | Vendor Panel

Chaired by Jason Smith, PhD, VP, Elemental Reasoning, Director, Business Architecture Guild

Abstract: The Business Architecture Guild[®] has a tool vendor program that engages vendors that agree to adopt the Business Architecture Guild Metamodel and Business Architecture Core Metamodel standard. The vendor program is focused on highlighting tool vendors that can help organizations scale their business architecture practices, which includes the ability to import and manage the Guild's industry reference models. Representative tool vendors will join the panel to discuss the latest advancements in tools and technologies available to organizations today.

Bio: Jason Smith is Director of Elemental Reasoning, a software design and development company. He has more than three decades of experience as a software engineer, researcher, and author. He previously served as VP of standards for the Object Management Group (OMG), where he led the efforts of the world's leading technology experts in technical modeling, ontologies, and technology specification adoption. Jason also served as Director of Innovation and Lead Researcher at TSRI, worked as a Postdoctoral Researcher at IBM, and authored the groundbreaking book, *Elemental Design Patterns* (Pearson Publishing). He is a board member of the Business Architecture Guild and Robinson Center for Young Scholars. Jason graduated from University of North Carolina at Chapel Hill with a PhD in Computer Science, following prior degrees in Physics and Mathematics.

5:00 – 5:15 pm | Day 2 Wrap-up

Co-Chair: William Ulrich, President, TSG, Inc., Partner, Business Architecture Associates, President, Business Architecture Guild

Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Vice President and Co-Founder, Business Architecture Guild

Co-Chair: Mike Rosen, Wilton Consulting-Retired, Director and Co-Founder Emeritus, Business Architecture Guild

Abstract: The Guild Co-Chairs will open the floor to discuss feedback and questions from Innovation Summit Day 2.

Business Architecture Innovation Summit – Day Three (Thursday, March 26, 2026)

Note: All times are listed in Eastern Time (EDT)

8:45 – 9:15 am | Business Architecture Guild Resources & Engagement

Co-Chair: William Ulrich, President, TSG, Inc., Partner, Business Architecture Associates, President, Business Architecture Guild

Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Vice President and Co-Founder, Business Architecture Guild

Co-Chair: Mike Rosen, Wilton Consulting-Retired, Director and Co-Founder Emeritus, Business Architecture Guild

Abstract: The Guild Co-Chairs will discuss content, reference models, training referrals and working groups available to members of the Business Architecture Guild and answer any relevant questions on that topic.

9:15 – 10:00 am | Communicating & Demonstrating the Value of Business Architecture

Stephanie Ramsay, Associate Director Enterprise Architecture & Strategy, RTX

Abstract: An important part of building an effective Business Architecture (BA) discipline that aligns business strategy with operational execution and coherence across the organization is not only communication, but demonstration of value. This presentation will showcase methods used to show the value of Business Architecture at RTX. It will explore what has worked well, what has not been as effective and future plans for revealing the value of business architecture.

Bio: Stephanie leads the Business Architecture Practice at RTX with a team of business representatives and is a co-lead for the Business Architecture Guild's Manufacturing Reference Model Team. With 25 years in aerospace and defense at RTX, she is experienced in enterprise/business architecture, digital product/service management, and portfolio management. Stephanie is an Open Group Master Certified Architect and her education includes a bachelor's degree in business and a Master's degree in Supply Chain Management. Stephanie is committed to advancing the Business Architecture discipline internal to RTX and external through work at the Business Architecture Guild and the Object Management Group Standards Development Organization (OMG SDO).

10:00 – 10:20 am | Break

10:20 – 11:05 am | Capability-Driven Product Strategy: Embedding Business Architecture in Innovation

Missy Boser, Director, Business Architecture and Solutions, Surescripts
Maggie Buchinger, Enterprise Business Architect, Surescripts

Abstract: At Surescripts, Business Architecture is embedded within the Product Innovation organization, enabling deep alignment between strategic intent and product execution. While our practice is grounded in the BIZBOK® framework, we've developed a proprietary extensible model

tailored to Surescripts' product capabilities. This model allows us to map and manage these capabilities in a way that supports Product Management by ensuring our solutions remain compliant with industry standards and are always future ready. Surescripts' capability framework plays a critical role in guiding product decisions. It helps teams avoid duplication by identifying existing capabilities across product lines, fostering reuse and efficiency. It also serves as a strategic lens for evaluating partnerships and customer opportunities, allowing us to assess how our capabilities can solve real-world problems and deliver differentiated value. This session will share how Business Architecture has become a trusted partner to Product Management, influencing roadmap planning, supporting agile delivery, and driving alignment across the enterprise. Attendees will gain insights into how a capability-driven approach can elevate product strategy and accelerate innovation.

Bio: Missy Boser is a visionary leader in business architecture and analysis with over 15 years of experience as a business analyst and architect. At Surescripts, she pioneered the company's business architecture practice, driving sustainable growth and innovation. Her success led to her promotion to Director of Business Architecture and Solutions. As a Certified Business Architect®, Missy bridges strategy and execution using structured, value-driven methodologies. She developed the Solution Blueprint framework and a shared services model for business architecture and analysis, helping teams deliver with clarity, agility, and measurable impact. Her approach emphasizes collaboration, scalability, and strategic alignment. Missy has guided organizations through complex change initiatives using capability modeling, value stream mapping, and strategic road mapping. Passionate about advancing the discipline, she contributes to the Business Architecture Guild through thought leadership and practice development. Missy is a Certified Business Architect (CBA)®.

Bio: Maggie Buchinger is an Enterprise Business Architect with a background in Product Management and Business Analysis. With her ability to align business capabilities with enterprise strategy, Maggie brings a unique blend of analytical rigor and collaborative leadership to every initiative she leads. Known for her thought leadership and practical insights, Maggie is passionate about elevating the role of business architecture as a catalyst for change. She regularly contributes to enterprise-wide initiatives that enhance decision-making, improve customer experiences, and deliver measurable business outcomes. At the intersection of business and technology, Maggie excels in translating vision into actionable architecture, enabling organizations to adapt, innovate, and thrive in dynamic markets. Her work spans cross-functional domains, where she partners with stakeholders to design future-state models, optimize value streams, and foster enterprise agility. She brings a wealth of experience, a strategic mindset, and a collaborative spirit to the business architecture community.

11:15 am – Noon | Lightning Talks – Rapid Fire Practice Updates from the Field

Panel Chair: Mike Rosen, Chief Scientist, Wilton Consulting

Abstract: There are many stories to tell about business architecture and the practice. Join us for the rapid update from the field where various individuals share their knowledge and experience in a series of rapid-fire lightning talks. The knowledge shared is matched by the entertainment value of the sessions.

Noon – 1:00 pm | Lunch

1:00 – 1:45 pm | Using Data as a Strategic Asset to Leverage Business Architecture

Peter Aiken, Associate Professor, Virginia Commonwealth University, President, DAMA International

Abstract: Business architecture and data management have long shared three unfortunate characteristics: an absence from long-term systemic thinking, executive sponsorship and funding, and underrepresentation in educational curricula. Collectively, these issues present a situation where business professionals end up stumbling upon these disciplines, versus having them integrated into standard management practices. This program will discuss data's role in today's modern enterprise, business architecture's role in realizing high-quality, well-architected data, and data and business architecture's combined role in maximizing the value of AI.

Bio: Peter Aiken, PhD is an acknowledged Data Management (DM) authority, an Associate Professor at Virginia Commonwealth University, President of DAMA International, and Associate Director of the MIT International Society of Chief Data Officers. For more than 35 years, Peter has learned from working with hundreds of data management practices in 30 countries including some of the world's most important. Among his 12 books are the first on CDOs (the case for data leadership), focusing on data monetization, on modern strategic data thinking and objectively specifying what it means to be data literate. International recognition has resulted in an intensive schedule of events worldwide. Peter hosts the longest running data management webinar series hosted by partners at Dataversity. Starting before Google, before data was big, and before data science, Peter founded a number of companies that helped more than 200 organizations leverage data-specific savings have been measured at more than \$1.5B USD. His latest is Anything Awesome.

1:55 – 2:40 pm | Unlocking Strategic Value Through the Financial Services Product Map

Kirsty McGregor, Lead Business Architect, NatWest Group

Tim Hale, Enterprise Architect, Arvest Bank

Mindy Dunlap, Certified Business Architect, Arvest Bank

Abstract: The Business Architecture Guild's Financial Services Reference Model (FSRM) team recently released a product map and is working on enhancing it with associated product entitlements and business capability mappings. This is a new artifact for the FSRM team and the presenters are excited to share it with the business architecture community. Connecting products to capabilities is a core concept in the Business Architecture Guild's metamodel. In the financial services domain, products are the basis for the agreements made with customers that entitle them to various financial services with associated rights and obligations. These financial services take the form of deposits, loans, wealth management, and more. This session will explore the product map content and the work efforts involved in producing it. To accelerate the discussion on the product map journey, the session will cover the principles discovered and used to help build it; the expected benefits for using the product map in real-world scenarios; and conflicts, choices and lessons learned along the way.

Bio: Kirsty McGregor is a Certified Business Architect® as well as being TOGAF certified and leads a team of Business Architects within the central Architecture and Engineering department at NatWest Group. Kirsty has over 25 years of experience within the financial services sector spanning HR & Payroll software implementation consultancy, business analysis, production support, testing and architecture. She has been a member of the Financial Services Reference Model team for over 2 years and supported the development of the new product map. Kirsty is passionate about supporting others to succeed and sharing knowledge and set up a Business Architecture meet-up in Edinburgh, Scotland in 2024 to help build the growing business architecture population within Scotland.

Bio: Tim Hale is an Enterprise Architect at Arvest Bank, where he leads the Business Architecture practice. As he developed his financial services knowledge, he joined the Financial Services Reference Model team to accelerate his learning and to contribute his expertise to the Guild and its projects. Prior to Arvest, he has operated his own consulting firm; he spent 30 years at Walmart Technology with 20 of those years in Enterprise Architecture where he developed and guided their global

enterprise architecture practice and played a leading role in their agile transformation. Tim began his career as a consultant with Arthur Andersen and Co. He is also a Certified Public Accountant (retired).

Bio: Mindy Dunlap is a Certified Business Architect (CBA)[®] at Arvest Bank with more than 30 years of experience in the financial services industry. Her career spans both frontline banking and back-office technology roles, giving her a deep understanding of how strategy, operations, and systems come together to serve customers. Mindy has helped establish and mature the bank's business architecture practice. She is also a member of the Financial Services Reference Model (FSRM) team, where she is contributing to the evolution of the Product map with the inclusion of Product Entitlements.

2:40 – 3:00 pm | Break

3:00 – 3:45 pm | **Strategic Synergy: Blending Systems Thinking and Design Thinking in Business Architecture**

Kelley Eckmayer, Business Solutions Architect, Reinsurance Group of America

Tim Vandeput, Business Architect, TConsult

Abstract: An exploration of business architecture's synergistic application of systems thinking and design thinking, demonstrating how their integration fosters a holistic, human-centered approach to strategic planning and organizational optimization. By combining these methodologies, business architects can effectively navigate complexity, enhance customer experiences, and drive sustainable growth.

Bio: Kelley Eckmayer is a distinguished enterprise architecture leader who excels at leveraging business architecture to translate strategic vision into tangible organizational achievements. As a Business Architecture leader at RGA (Reinsurance Group of America), Kelley brings over 15 years of experience in shaping and optimizing business strategies to drive growth and innovation, with a strong background in financial services and non-profit organizations. A seasoned expert, she guides large organizations through the intricacies of business, enterprise, data architecture, and strategic planning. Holding multiple industry certifications, Kelley is known for her ability to communicate complex ideas with clarity and engage audiences in discussions that inspire actionable strategies, focusing on demonstrating the value delivered from strategy aligned technology investments. As a Certified Business Architect (CBA)[®], Kelley is currently a Business Architecture Guild Board Member, Editorial Board Chair, and Team Mentor. She is also a Certified Business Architect (CBA)[®].

Bio: Tim Vandeput is a business owner and business architect who leads TConsult, an advisory practice focused on turning strategy into execution. He partners with customers to design operating models, prioritize portfolios, and build roadmaps that connect funding to value. Tim's approach uses proven methods including Balanced Scorecard, Lean/Six Sigma, and governance practices such as COBIT—always with an emphasis on clarity, simplicity, and measurable outcomes.

Recently, he has developed five-year business cases for sustainability reporting and compliance, aligning data collection, controls, and automation with capex/opex planning and risk-avoidance benefits. Tim holds a Master's Degree in Enterprise IT Architecture from Antwerp Management School and a Bachelor's in ICT for Analysts and Architects from the NOVI University of Applied Sciences.

3:55 – 4:40 pm | **A Business Architecture Journey: The Importance of Finding Champions**

Robert Doyle, Senior Manager, Business Architecture and Analysis, IESO

Abstract: There are guideposts along the way of every journey. Sometimes you breeze down the highway counting mile markers because you are right on schedule. Other times you sojourn to unseen landmarks going out of your way to learn. And other times you are waylaid by your surroundings and your destination seems to get further away every day. At every guidepost, there are people who can help you navigate uncertainty, teach you new things, open up new connections, and creatively help you get to your destination. Whether you've arrived or not, this presentation will walk you through how to plan and find and use champions to grow and nurture the business architecture practice in your organization.

Bio: Robert Doyle is the Senior Manager of Business Architecture and Analysis for the Independent Electricity System Operator (IESO) which works at the heart of the electricity system in Ontario, Canada. Rob leads a team of business architects and business analysts who helps its customers turn their business aspirations into tangible, efficient and innovative realities. He is passionate about developing leaders who develop leaders.

4:45 – 5:15 pm | **Closing Remarks from the Co-chairs**

Co-Chair: William Ulrich, President, TSG, Inc., Partner, Business Architecture Associates, President, Business Architecture Guild

Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Vice President and Co-Founder, Business Architecture Guild

Co-Chair: Mike Rosen, Wilton Consulting-Retired, Director and Co-Founder Emeritus, Business Architecture Guild

Abstract: Just because the Summit has come to a close does not mean your community engagement should end. The Innovation Summit wrap-up will collect preliminary feedback, deliver, closing remarks, and discuss where attendees can continue to engage in business architecture beyond the Summit. The session will take open questions and provide insights into other topics attendees may raise.