

# Business Architecture Innovation Summit – Day One, Tuesday, March 21, 2023

*Note: All times are listed in Eastern Time*

**8:45–9:15 am**

**Welcome Address: Business Architecture 2023**

*Co-Chair: William Ulrich, President, TSG, Inc., Cofounder, Business Architecture Associates, President, Business Architecture Guild®*

*Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Cofounder, Business Architecture Associates, VP, Business Architecture Guild®*

**Abstract:** The opening session will share the exciting advancements across the global business architecture community over the past year. Topics include industry proliferation, successes and adoption, industry reference models, standards advancements, tool evolution, academic updates, and growing acceptance in strategy execution. The session will also discuss exciting new directions for the year ahead.

**Bio:** William Ulrich is a management consultant, mentor, author, and workshop leader. He is President of TSG, Inc., President and Cofounder of the Business Architecture Guild®, and Co-Chair of OMG Architecture-Driven Modernization Task Force. William is a Principal Instructor in Business Architecture Associates, a Guild-accredited training company. He is a Certified Business Architect® (CBA®) and serves on the Guild certification committee.

**Bio:** Whynde Kuehn is Managing Director at S2E Transformation Inc. and a long-time practitioner, educator, and thought leader. Ms. Kuehn is Co-Founder, Vice President, and Academic Committee Chair of the Business Architecture Guild® and Principal Instructor at Business Architecture Associates, Fellow with the Institute for Digital Transformation, and author of the book *Strategy to Reality*. She is a Certified Business Architect® (CBA®) and serves on the Guild certification committee.

**9:15–10:00 am**

**Cross-Initiative Alignment for Three Major Initiatives**

*Juliane Berger, Head of Business Architecture, Allianz Global Corporate & Specialty SE*  
*Alex Daly, Business Architect, Allianz Global Corporate & Specialty SE*

**Abstract:** This session will discuss how Allianz Global Corporate & Specialty SE is using business architecture to contribute to strategic decisions and bridge the gap from strategy formulation through execution. Business architecture has been used to create a reusable structure that enables cross-initiative alignment and improve planning and decision making. Through big picture thinking, the business architecture team emphasized the importance of avoiding a siloed approach, executing a thorough capability assessment for each initiative, and highlighting impacts across common capabilities. Capability heat-mapping provided clarity as to which shared business areas should be prioritized for consideration.

**Bio:** Juliane Berger is leading the business architecture practice at Allianz Global Corporate & Specialty SE. She has been a long-time certified practitioner, being engaged with Business Architecture Guild's Insurance Reference Model team. She actively engages in and contributes to international business architecture networks. Previously she held roles with Allianz and BMW Group in project management and business architecture.

**Bio:** Alex Daly is a business architect at Allianz Global Corporate & Specialty SE. Alex has worked in business architecture at Allianz Global Corporate for two years. Alex has worked within the insurance industry for 15

years, working mainly in the operations function before becoming a business analyst and ultimately a business architect.

10:00–10:20 am | Break

10:20–11:05 am | Fast Tracking a Business Architecture Practice using Value-Driven Approach

*Joseph Okonek, Business Architect, Globe Life*

**Abstract:** Globe Life established a business architecture practice to drive business value in under 5 months by meeting with business stakeholders where to best meet business needs and gain value. The team applied a tiered approach that enabled strategy to execution. Steps included having a Certified Business Architect® (CBA®) conversant in the language of the business to evangelize a value proposition, identify early adopters in a “pen to paper” approach to understanding the business, and then adding value! The team shared mappings with various business units to assist them with strategic planning and value delivery roadmaps, targeting high value transformation initiatives. Applying this approach, the team demonstrated that issues were not always system oriented but may stem from inefficient processes across value streams. Work included tying business requirements to value streams and value items and leveraging the business continuity team to identify areas requiring business continuity heat mapping.

**Bio:** Joseph Okonek is a Business Architect at Globe Life. Joseph began his career in accounting and finance and moved quickly into business and systems consulting. He has been a business and technology consultant for over twenty years spanning multiple industries and roles, including business architect, solution architect, GRC architect, innovation team leader, and consulting practice owner. Joseph’s industry experience spans financial services, supply chain management, and software development.

11:15–Noon | Business Architecture for Start-ups

*Divyansh Alleppa, Senior Manager, Wholesale Transformation, HSBC*

**Abstract:** The small business startup, characterized by a few individuals who know everything, focuses on building and driving products and services. The startup often focuses on emerging technology as a basis for disrupting existing markets, with a heavy focus on IT and customer interfaces. But if the focus is wrong, the result could be catastrophic, having little margin for failure. For example, a heavy investment on full stack developers to build UI while lacking an understanding of value and information perspectives may result in a suboptimal product or issues scaling up. In these situations, business architecture is often delayed. This session will discuss the importance of applying business architecture to startups and small organizations, applying a bare minimum approach focused on capabilities and value streams which, when applied in the first critical years, would save limited cash and time and complement the brilliance of the founders.

**Bio:** Divyansh Alleppa is a Senior Manager in Wholesale Transformation at HSBC and has extensive knowledge in banking, technology, and operations transformation. He has expertise in managing large strategic transformation initiatives across IT, business, and operations, predominantly in financial institutions. Prior to HSBC, he worked as a consultant.

Noon–1:00 pm | Lunch

1:05–1:50 pm

## Enabling Strategy Execution & Business Architecture at TimkenSteel

*Rick Hawkins, VP, TimkenSteel*

*Terence Zhang, Director of Business Architecture, N.A., Fujitsu*

*Kartik Ravel, Value Realization Practice, Fujitsu*

**Abstract:** This session will provide an overview of the digital transformation journey taken at TimkenSteel. The discussion will highlight capability-based planning approach used as a basis for understanding and articulating TimkenSteel’s digital transformation strategy in the form of business outcomes linked to capabilities and enabling technology. In addition, the session will present TimkenSteel’s novel use of process mining and application transformation to inform its digital capability planning work. The session will also provide an overview of the Adaptive Transformation Execution framework leveraging business architecture, which integrates business capability centricity and business outcome management, complemented by an effective tooling platform.

**Bio:** Rick Hawkins is a VP at TimkenSteel. Rick has held director-level roles in IT managing infrastructure, application support, and in supply chain management, and led the work stream when Timken spun off the steel business into TimkenSteel. He currently leads a transformation project focused on driving the company toward a digital future aligned with the company’s growth strategy. Prior to joining Timken, he was with Avery Dennison, serving in various IT management roles. He earned his MBA at Case Western Reserve University and currently leads the board of directors for Stark County TASC. He previously served on the Dean’s Advisory Council and the Advisory Board at the University of Akron.

**Bio:** Terence Zhang is a seasoned business transformation leader and business architecture practitioner with more than twenty years of experience delivering transformation initiatives in financial services, telecommunications, public sector, and manufacturing. He successfully launched and led business architecture practice in two separate organizations to accelerate the transformation agenda, and leads the efforts to mature the practice at Fujitsu North Americas. Terence is a Certified Business Architect® (CBA®) and a contributing member of various Business Architecture Guild® working groups. He holds a M.Eng. in Technology Innovations Mgmt., M.Sc. in Applied Physics, B.A. in Physics.

**Bio:** Kartik Ravel heads the Value Realization Practice for Fujitsu N.A. and serves as an advisor to the development of Fujitsu’s global transformation capabilities. With more than twenty-five years of experience in business and digital transformation, he has held key leadership roles in the areas of enterprise architecture, organizational change management, and digital transformation. Kartik holds a B.A. in Business Administration from Rutgers University and completing graduate studies in Organizational Development at Marylhurst University. He sits on the board of the Open Group and is a guest lecturer on business architecture at Penn State University.

2:00–2:45 pm

## Leveraging Capabilities for Initiative Alignment & Strategy Execution

*Andrew Mathieson, Enterprise Architect - Business Architect, Southwest Airlines*

**Abstract:** This session will discuss a method for enabling strategy execution that leverages business architecture to drive implementation success. The approach incorporates capabilities, information concepts, initiatives, and other business architecture domain perspectives. It takes relationship data between initiatives and other business architecture domains and runs them through social networking algorithms to develop reimagined work packages that provide the optimal alignment of work, while minimizing dependencies, costs, and risks. The method can be executed using various tools and at any level of planning.

**Bio:** Andrew Mathieson is a seasoned Enterprise Business Architect and thought leader with twenty years of exemplary consultative and corporate experience specializing in the assessment and analysis of enterprise

strategy, business architecture, organizational design, process, and delivery execution. Andrew currently leads a team of Business Architects at Southwest Airlines.

2:50–3:15 pm | Break

3:15–4:00 pm

### Refactoring Business Capabilities using Business Architecture Guild® Reference Models

*Troy Nelson, Enterprise Architect III, CareSource*

**Abstract:** CareSource had an existing business capability model created by an external consultancy. It was used primarily for supporting project scoping and estimation. To no surprise, the model blended capability and non-capability concepts in order to support its use as a project planning device. As a first step in maturing the business architecture practices, the team set about replacing the capability model with a properly-defined version using the Business Architecture Guild's industry reference models, coupled with guidance from the Guild's *BIZBOK® Guide*. This presentation will cover how the team carried out this change, the challenges of using an industry reference model, compromises made in name adoption, limitations of current tooling, the impact on project planning, and opportunities unlocked through the use of the new model, which included value streams, product models, and more.

**Bio:** Troy Nelson is an Enterprise Architect III at CareSource, a managed care organization based in Dayton, OH. He is a Certified Business Architect® (CBA®), member-at-large of the Twin Cities Business Architecture Forum Board, and member of the Guild's Insurance Reference Model team. At CareSource, Troy focuses on maturing the business architecture practice, leveraging Guild-supplied industry reference models to reengineer externally-developed business capability models, leverage capability-based planning to visualize misalignments in investments, standardize value streams, and integrate them into solution delivery information models and initiatives for the annual strategic planning process. Troy supports a variety of business areas, helping define strategies, document business models, craft roadmaps, and package the related initiatives and investments.

4:10–5:15 pm

### Reference Model Panel Discussion: Rapid Deployment & Adoption

*Panel Chair: Mike Rosen, Cofounder & Director Emeritus, BusinessArchitecture Guild®*

**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:** Mike Rosen is Founder of Wilton Consulting (retired) and Cofounder, 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®).

5:15 pm | Day 1 Wrap-up

*Whynde Kuehn, William Ulrich*

**Abstract:** Whynde Kuehn and William Ulrich will open the floor to discuss feedback and questions from Innovation Summit Day 1.

# Business Architecture Innovation Summit – Day Two, Wednesday, March 22, 2023

*Note: All times are listed in Eastern Time*

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

*Whynde Kuehn, William Ulrich*

**Abstract:** William Ulrich and Whynde Kuehn will provide an overview of day two, along with themes covered for this day.

## 9:15–10:00 am | Letter to My Younger Self: Ten Things I Know Now I Wish I Knew When Onboarding Business Architecture

*Deborah Christner, Enterprise Architecture Senior Business Architect, Country Financial*

**Abstract:** Everyone says hindsight is 20/20. In this session, the presenter will take a brief journey with attendees by sharing practical business architecture onboarding lessons learned over a period of several years. Consider this an exercise similar to sending a letter to one's younger self, where you can share nuggets of information you wish you had known back then. The session will additionally walk-through lessons learned by laughing, listening, and learning together. In closing, the hope is that the presentation answers questions attendees have been pondering at any point along their business architecture practice deployment journey.

**Bio:** Deborah Christner is an Enterprise Architecture Senior Business Architect at Country Financial. She began her journey at State Farm as a Financial Business Systems Analyst, moving to the System Designer Skill Center and on to become a Technical Architect. After joining Fidelity Investments, she presented a paper to bring business architecture into Fidelity, a paper that changed her life. She moved into her current role at Country Financial in 2022, seeking to help them embrace business-led transformation. She is known for her dogged determination and passion, evangelizing, educating, and implementing *BIZBOK® Guide* best practices. She continues to seek opportunities to grow and address challenges as she discovers them (or they discover her).

## 10:00–10:20 am | Break

## 10:20–11:05 am | Integrating Business Architecture and BIAN into a Whole Enterprise Architecture Stack

*Hassan Ahmed Hassan Mohamed, Director, Head of Business Architecture, Commercial International Bank of Egypt*

**Abstract:** BIAN is a reference architecture that aims to ensure interoperability within and among financial institutions. The BIAN architecture leverages elemental modules called service domains that are canonical, consistent, mutually exclusive, and mutually complete. Business architecture represents real-world aspects of an organization used to align strategic objectives and tactical demands. There is confusion as to how to best leverage both frameworks, leading many in the architecture community to consider them alternatives to each other. This session will argue that the two frameworks are not alternatives but rather complementary to each other. Integrating them into one complete, connected, and integrated architecture stack enhances business understanding, aligns strategy, business models, and operating models, and expands scenarios and use cases for applying the business architecture and BIAN frameworks.

**Bio:** Hassan Ahmed Hassan Mohamed is Head of Business Architecture, Commercial International Bank of Egypt. He was introduced to business architecture about six years ago and exploded into the profession about three years ago with courses and then became a Certified Business Architect® (CBA®). He established a business architecture practice for a large insurance company focusing mainly on capabilities, value streams, information and working with multiple other practices within the company having found ways for all to come together effectively. Hassan's background is primarily in IT, and he has worked as a Manager, Business Analyst, created a Business Analyst Competency Centre, dabbled in Project Management, Account Management, and as a Scrum Master.

11:15 am–noon

## The Heart and Brain of Your Business: The Role of Architecture in Business Operations

*Anthony Insolia, Author, Managing Partner, Enterprise Transformation Management, LLC*

*Russell Boyd, Author, Director of Enterprise Architects at Technatomy Corporation*

**Abstract:** Whether modernizing or launching a business, an organization needs to be clear as to the value it seeks to deliver, products and services that offer that value, and delivery model for those products and services. Our book, "The Heart and Brain of your Business", outlines how architecture is a means for documenting and formalizing enterprise building blocks and their role in deploying products, services, and related value. One metaphor involves the Periodic Table of Enterprise Elements, which enables executives to visualize the business building blocks that make up the organization as a basis for investment planning. This session will leverage the metaphorical role of the "Periodic Table of Enterprise Elements" as a vehicle for addressing business challenges and optimizing revenue and costs for business model transformation, supply chain optimization, and merger and acquisition planning, execution, and related activities.

**Bio:** Anthony Insolia played a leadership role in four of the most significant business transformation and enterprise architecture/reengineering efforts of the past decade: IBM, Department of Defense, NYC Government, and now NYS Government. For each of these business transformations he applied well-defined business models like the Porter Value Chain Model and business process improvement/re-engineering techniques to optimize many facets of these businesses. Today he applies his leadership skills and knowledge of business transformation to his own management consulting business. He is coauthor of "The Heart and Brain of Your Business: The Role of Architecture and Engineering in Business Operations".

**Bio:** Russell Boyd is Director of Enterprise Architects at Technatomy Corporation. He provides thought leadership and hands-on implementation of architecture programs, IT strategy, IT portfolio alignment, and architecture product development using established frameworks, methodologies, and tools. He is coauthor of "The Heart and Brain of Your Business: The Role of Architecture and Engineering in Business Operations". Russell is a retired USAF officer and holds masters and bachelor's degrees and is DoDAF certified.

Noon–1:00 pm

Lunch

1:00–1:45 pm

## Risk Management and Business Architecture

*Ken Williams, Chief Business Architect, FedEx Express*

**Abstract:** Risk management and business architecture collectively provide an important layer of understanding of the active environment enterprises face today. Architecture risk management is a competency and skill that applies to the Business Architect role, based on the context in which the role operates. Architecture risk management supports strategic business and decision alignment. Risk management must be applicable at the operational and strategic level. For example, a Risk Manager may

want to quantify different types of risk on an organization's capability map to formulate and share mitigation strategies and priorities. Capability and policy mapping play important roles in this practice. This session will address how business architecture can inform strategic and operational risk management through a holistic view of the enterprise ecosystem. It will additionally showcase how business architecture supports risk analyst in the development of the Open FAIR™ (Factor Analysis of Information Risk) model, leveraging a tightly defined taxonomy.

**Bio:** Ken Williams is a Chief Business Architect with more than twenty years of experience in operational transformation within the Insurance, Financial Services, and Transportation industries. Ken is a Certified Business Architect (CBA)®, Certified Change Management Professional (CCMP)®, Certified Customer Experience Professional (CCXP)®, Project Management Professional (PMP)®, and PMI Agile Certified Practitioner (PMI-ACP)®. Working with business leaders, he helps execute strategic and tactical transformation through interweaving business architecture, organizational change management, benefits realization management, and Agile project management. This alignment provides higher levels of transparency, engagement, and alignment to corporate strategic goals.

1:45–2:30 pm

### Business Architecture, A Journey of Acceptance

*Gary Wright, Senior Manager, VSP*

**Abstract:** Business architecture was initially implemented at VSP six-to-seven years ago, yet the company struggled with acceptance at senior levels of the organization. The divide between the strategy team and business architecture was clear, but there was also an opportunity to partner with Solution Architects in the technical division to understand their needs and position business architecture as a means of more clearly describing business needs. To achieve this objective, business architecture was inserted into the PMO between strategy and technical teams to interpret the impact of strategic objectives and refine the deliverables needed by the technical teams to understand business needs and increase project success. The approach developed new business views that informed decision makers, as opposed to speaking in business architecture terms. This session will discuss this journey, artifacts employed, and PMO processes introduced to interface with business architecture and other areas of the company.

**Bio:** Gary Wright is a Senior Manager and Business Architect at VSP. He is a savvy, energetic, international business development professional who is experienced with Startups, Global 50, and Fortune 500 companies. Gary is an expert corporate presenter, motivational speaker, and podcast host. He is also a Certified Business Architect® (CBA®).

2:35–3:20 pm

### Capability Matchmaker: Introducing Capabilities to Organizations Using Practical Examples

*James Drummond, Business Architect, Graincorp*

**Abstract:** Introducing the concept of business capabilities to an organization can be challenging but rewarding. Providing an organization with a common vocabulary seems simple enough, but who's definition should you adopt? Does the organization have the time or inclination to do it justice? What do you do if there is no agreed standard for your industry? How can you chart a course? This retrospective session will reflect on the journey towards an accepted business capability map, from considering an object-based framework through to a function-based alternative and eventually an ERP centric approach, and how the approach enables an organization-wide, transformational journey.

**Bio:** James Drummond is a Business Architect with Graincorp and has been involved in the IT field for more than twenty years, focused on all aspects of transforming businesses and business systems. James' career to date has spanned many roles and industries and includes development, functional and technical consulting, solution architecture, and project and program management including leading business transformation teams. His focus has always been on business objective-led transformation, having recently found business



architecture to drive transformation. His industry experience spans utilities, industrial manufacturing, banking, public sector, retail, professional services, and agriculture.

3:20–3:35 pm

Break

3:35–4:20 pm

**Defining Strategic Objectives: Business Architecture Creates Laser Focus**

*Teresa Garca, Lead Strategy & Planning Consultant, Wells Fargo*

**Abstract:** Strategic planning sets the long-term direction of an organization. To ensure an organization is on the right path and collectively moving in the same direction, clear objectives must be established. Not only that, but key metrics that articulate how the organization will measure the effectiveness of the investments made through its initiatives must be defined with measurable goals. This presentation will help explain how to create laser focus on the most important outcomes to achieve the desired Return on Investment (ROI).

**Bio:** Teresa Garcia-Holm is a Strategy Consultant in the Operations Transformation Group at Wells Fargo & Company. She focuses on enterprise payments transformations, advancing holistic, common, and optimized designs to deliver against strategic objectives. She applies her expertise in business architecture and interdisciplinary alignment between process, risk, customer experience, and technology to improve cross-enterprise collaboration. Teresa has held various positions in financial services over the past 20 years, with much of her career focused on large-scale regulatory changes and complex multi-platform system integrations. She has been a member of the Business Architecture Guild® since 2017, is a Certified Business Architect® (CBA®), co-leads the Guild’s Financial Services Reference Model team, and serves on the Guild Accredited Training Partner® evaluation team.

4:25–5:25 pm

**Business Architecture Tool Vendor Panel: Updates and Insights**

*Chaired by Jason Smith, PhD, VP, OMG, Director, Business Architecture Guild®*

**Abstract:** The Business Architecture Guild® has a tool vendor program that engages vendors that agree to adopt the pending Business Architecture Core Metamodel standard and have the ability to import and enable the advancement of the Guild’s industry reference models. Some of these tool vendors will join this panel to discuss the latest advancements in tools and technologies available to organizations today.

**Bio:** Jason Smith has more than three decades of experience as a software engineer, researcher and author. He currently serves as VP/Technical Director for the Object Management Group (OMG) standards development organization where he works with the world's leading experts in technical modeling and ontologies, oversees processes for technology specification adoption and chairs the Architecture Board. Prior to OMG, Jason founded Elemental Reasoning, 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 Robinson Center for Young Scholars and graduated from University of North Carolina at Chapel Hill with a PhD in Computer Science, following prior degrees in Physics and Mathematics.



5:25 pm

| Day 2 Wrap-up

*Whynde Kuehn, Mike Rosen, William Ulrich*

**Abstract:** Whynde Kuehn, Mike Rosen, and William Ulrich will open the floor to discuss feedback and questions from Innovation Summit Day 2.

6:00–8:00 pm

| Evening Reception

# Business Architecture Innovation Summit – Day Three, Thursday, March 23, 2023

*Note: All times are listed in Eastern Time*

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

*Whynde Kuehn, Mike Rosen, William Ulrich*

**Abstract:** Whynde Kuehn, Mike Rosen, and William Ulrich will discuss resources available to members of the Business Architecture Guild® and answer any relevant questions on that topic.

## 9:15–10:00 am | Leveraging “One-View” Capability-Based Planning Approach to Global Business Transformation

*Henrik Ekstam, Roadmap Leader, IKEA Retail (INGKA)*

**Abstract:** IKEA is going through a once-in-a-generation, enterprise-wide innovation of its business operating model. A business architecture approach is guiding the scoping, prioritization, and planning of our multi-year, global transformation roadmap. IKEA’s “one-view” capability framework establishes the foundational building blocks for an enterprise-wide intersection of perspectives in defining a common roadmap. One-view consolidates a number of data-points, such as strategy, portfolio management, and delivery, reports, forums, and ceremonies to support decision-making and deliver a holistic, integrated view of roadmap scope and timelines. This presentation will explain the approach, offer a deep-dive into IKEA’s capability playbook, and share key learnings and battle-scars.

**Bio:** Henrik Ekstam is a Roadmap Leader and Senior Business Architect at IKEA Retail (INGKA). He holds an MSc in Computer Science and is a frequent presenter, including past Innovation Summits and Guild-sponsored European Business Architecture Guild events. Henrik has been working with IKEA and the IKEA Business Capability Model since 2014 and is currently working as Roadmap Leader, combining strategy, portfolio management, and business architecture.

## 10:00–10:20 am | Break

## 10:20–11:05 am | Business Architecture Case Study at a Central Reserve Bank

*Philip Steenekamp, Lead Business Architect, South African Reserve Bank*

**Abstract:** Like many large organizations, the South African Reserve Bank (SARB) is a complex and diverse conglomerate. The SARB is on a journey to renew its strategic systems through a series of transformational programs, all of which will touch the South African financial sector. However, unlike many other industries, reference models don’t exist for Central Banking. In order to anchor the transformational programs, the SARB has been defining the business architectures for several business areas and transformational programs. This presentation will provide an overview of the business architecture journey to date and cover practice formulation, standards adoption, a case study, and lessons learned.

**Bio:** Philip Steenekamp started his career at Telkom South Africa as a programmer in January 1992, after which he joined the Architecture, Strategy, and Planning team. He helped define and establish the Distributed Systems Management Architecture practice and led the Enterprise Application Integration team

for a period of two years. Philip joined the EA division of the South African Reserve Bank more than ten years ago, where he has focused on enterprise integration architecture and business architecture. Now dedicated to business architecture, he has been delivering related artifacts to five business areas in SARB. Formalizing the business architecture practice has been his key focus with the goal of ensuring consistency and coherence across different business areas.

11:15–Noon

## Leveraging Business Architecture to Transform Critical Data Models

*Steven Scott, Director of Business Architecture, Autodesk*

*Iris Melendez, Data Architect, Autodesk*

**Abstract:** Autodesk develops and distributes software for the architecture, engineering, construction, manufacturing, media, education, and entertainment industries. As Autodesk continues to transform its business models, it identified several critical data models that required transformation to support future business endeavors. Working with data architecture, the business architecture team leveraged Autodesk's capability map and information map to create conceptual data models that ultimately became the basis for its business systems transformation. This session will discuss the creation, ongoing maintenance and governance of the Product Data Model, with a lens on its implications for a business architecture team and its impact on initiatives that leverage this model and on Autodesk's customers and overall business.

**Bio:** Steven Scott is Director of Business Architecture at Autodesk. Steven has been driving critical business and system change on the forefront of Autodesk's business transformations for more than twenty years. He has been one of the key champions, evangelists, and leaders of Autodesk's move to business architecture-driven planning. Steven is a Certified Business Architect® (CBA®).

**Bio:** Iris Melendez is a Distinguished Data Architect for Autodesk, Inc. A highly experienced data architect with background spanning disciplines in enterprise transformation, she has been the vanguard for modernizing Autodesk's data architecture. Iris has championed the use of business architecture to define and refine business information models and has been instrumental in redefining Autodesk's customer and product models.

Noon–1:00 pm

Lunch

1:00–1:45 pm

## Strategy Execution Using Business Architecture in an ISO9001 Organization: Case Study of Logic Studio

*Alex Sanchez, CEO/Founder, Logic Studio*

**Abstract:** Logic Studio is a software development company that adopted ISO9001 to empower quality in every step of its stream value. In its continuous improvement commitment, it was decided, as a strategic priority, to adopt business architecture to provide a consistent, customer-centered perspective from planning through deployment. This case study is to share a practical experience to extend the benefits of embracing business architecture in an ISO9001 organization, which allows Logic Studio's business to frame and realize its strategy leveraging a persistent improvement approach.

**Bio:** Alex Sanchez is Founder and CEO of Logic Studio. He is a keen software developer, economics expert, and data-savvy, agile-minded entrepreneur with more than twenty years in the field of digital transformation. Alex has experience in banking, insurance, the public sector, and not-for-profits. He is a certified TOGAF™ Business Architecture Certified, SOA Architect, Scrum Master, PMP Project Management Professional, PRINCE2 certified, ISTQB Software Testing certified, .NET Software Development, and seasoned design

thinker. Alex was awarded Microsoft's "Most Valuable Professional" for Panama.

1:55–2:40 pm

### Selling Innovation: How to Intrigue Leaders and Gain Buy-in for Success

*Darin Powell, Global Digital Leader for Transformation Strategy & Innovation, Bayer AG*

**Abstract:** Innovation fuels transformation and innovators every day are coming up with ideas and concepts that change their world and business for the better. Breathing life into ideas requires partnership, alliances, and buy-in from leaders and influencers. Understanding and using the skills and methods of an innovationist is key to helping navigate the influence waters and bring innovation to reality. This session will share insights gleaned over a long history of innovation successes, applying a model to help innovators transition into "Innovationists". The skills shared will be useful to business architects building relationships and gaining buy-in from senior business leaders.

**Bio:** Darin Powell is a Global Digital Leader for Transformation Strategy and Innovation at Bayer AG. Throughout his thirty-year career, Darin has been a business architect, even when he did not know what one was or was familiar with the tools and methods of the craft. However, since he discovered the formal practice, he has applied it in many different roles in multiple corporations. Darin's current work focuses on normalizing business architecture in order to establish a formal practice within Bayer Crop Science.

2:40–3:00 pm

Break

3:00–3:45 pm

### Business Architecture Ensures Business Outcome in Scaled Agile Framework® (SAFe®)

*Eanna Sarah, Business Architect, Chief, ES Consulting for Pacific Gas & Electric*

**Abstract:** After two and a half years of implementing the Scaled Agile Framework® (SAFe®), business architecture has played a key role at PG&E, ensuring investment through the Portfolio Kanban from idea to realization. Business architecture filled an important gap highlighting and tracking the business value from high-level strategic themes to Minimal Viable Products (MVPs). By focusing on the MVP definition and linking it to strong leading and lagging indicators in the Epic Hypothesis and Lean Business Case, all team members from business leadership to developers had an achievable and laser focus on the business outcome.

**Bio:** Eanna Sarah has expertise in partnering with a business to uncover innovative IT solutions at the enterprise level and realize transformative business goals. Eanna is a trusted advisor to business leaders with more than twenty years of experience and delivers business outcomes by linking business strategy with technology investments and providing a clear path to execution that ensures system sustainability, flexibility, and growth. In addition, Eanna drives value for the enterprise by managing complexity, assessing risk and change, navigating ambiguity, and balancing cost with business performance. Eanna is a technology evangelist who gains support for enterprise-level roadmaps by collaborating with stakeholders across business and IT groups, as well as with external partners and suppliers. Strong technical architect skills provide Eanna with a proven track record of leading teams to deliver enterprise solutions, transforming challenges into high-value business results early and often.

3:50–4:35 pm

### Scaling an Enterprise-wide Business Architecture Practice at Salesforce

*Rajasekar Thangaraj, Director, Enterprise Business Architecture, Salesforce*

**Abstract:** Salesforce has grown at a tremendous pace since 1999, both organically via targeted acquisition. A side effect has been a maniacal outward focus at the expense of the evolution of its internal ecosystem,

particularly in relation to its architecture practices. Five years back, Salesforce embarked on a journey to mature practices to improve consistency, achieve better business outcomes, and drive tighter strategic alignment. The goal is to ensure that architecture practices are consistent across the enterprise to ensure that strategic planning is based on well-defined business capabilities and value streams. This session highlights how Salesforce developed and deployed its in-house business and enterprise architecture practices at an enterprise scale to drive strategy execution aligned with business priorities.

**Bio:** Rajasekar Thangaraj is Director of Enterprise Business Architecture at Salesforce. Prior to Salesforce, he spent twenty years in consulting helping clients with their business strategies and digital transformation programs. He has an MBA in Systems and holds various certifications, including project management, leading SAFe, and certified product owner.

4:35–5:00 pm

Business Architecture Approach Challenge: Addressing Burning Questions

*Moderated by Cochairs*

**Abstract:** Before attendees sign off or depart the 2023 Innovation Summit, the presenters want to be sure to close the loop on outstanding topics, key issues, and burning questions. This session will provide an opportunity for attendees to raise challenges or pose questions to speakers, other attendees, and cochairs. The discussion will provide the open space discussion opportunity many attendees have requested and, in addition to providing key insights, will point individuals to additional resources that they can leverage going forward.

5:00 pm

Closing Remarks

*Whynde Kuehn, Mike Rosen, William Ulrich*

**Abstract:** Just because the Summit comes to a close, it does not mean your community engagement should end. The Innovation Summit wrap-up will collect preliminary feedback, delivering 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.