

## Business Architecture Innovation Summit – Day One (Tuesday, March 19, 2024)

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

### 8:45 – 9:15 am | 12<sup>th</sup> Annual Business Architecture Innovation Summit: Welcome Address

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

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

*Co-Chair: Mike Rosen, Wilton Consulting-Retired, Director & Cofounder 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 proliferation of the discipline, executive sponsorship, industry reference models, standards advancements, tool evolution, academic updates, growing role in strategy execution and 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, Cofounder of the Business Architecture Guild and Co-Chair of the OMG Architecture-Driven Modernization Task Force. He is also a Principal Instructor at Business Architecture Associates, a Certified Business Architect (CBA)<sup>®</sup> and serves on the Guild's certification committee and editorial board.

**Bio:** Whynde Kuehn is the Managing Director at S2E Transformation Inc. and a long-time practitioner, educator and thought leader. She is also a Cofounder, Board Member and Academic Committee Chair of the Business Architecture Guild, a Principal Instructor at Business Architecture Associates, a Fellow at the Institute for Digital Transformation, a Certified Business Architect (CBA)<sup>®</sup> and on the Guild certification committee.

**Bio:** Mike Rosen is Founder of Wilton Consulting (retired) and Cofounder, Director Emeritus, and former VP at the Business Architecture Guild<sup>®</sup>. As Guild cofounder, Mike was a major contributor to the business architecture foundational concepts articulated in the *BIZBOK<sup>®</sup> 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<sup>®</sup> (CBA<sup>®</sup>).

### 9:15 – 10:00 am | Successful Business Architecture: Demonstrating Value from Strategy to Technology Investment Realization

*Kelley Eckmayer, VP, Enterprise Architecture Manager, PNC Bank, NA*

*Claire Wybrow, Enterprise Business Architect, PMP, CBPP, BRMP, Digital Management, LLC*

**Abstract:** In an environment where everyone is feeling pressure to maximize their value, the key is to showcase the alignment of strategy with the value delivered from technology investments. Business architecture plays a vital role in driving business outcome measurement models and articulating business outcomes to achieve an organization's strategic goals. This session will discuss the simplicity and complexity of traceable measurement from enterprise strategy to product KPIs, the key role of business architecture, and both guidance and lessons learned from PNC and DMI. With real-life examples, you will see how successful business architecture has the ability to provide value across a broad range of industries.

**Bio:** Kelley Eckmayer enables others to thrive and guides them to bring their visions into fruition, achieving this success as an Enterprise Architecture Manager. With over 15 years of experience in shaping and optimizing business strategies to drive growth and innovation, Kelley has a strong foundation in financial services and non-profit organizations. As a seasoned expert, Kelley has worked with large organizations, guiding them through the intricacies of business, enterprise, and data architecture, as well as process optimization and strategic planning. Kelley is known for her ability to communicate complex ideas with clarity and engage audiences in discussions that inspire actionable strategies. Kelley is a mentor for the Business Architecture Guild, co-chairs PNC's Business Architecture Community of Practice, and is a member of the BIAN Business Capability Model working group. Kelley is a Certified Business Analysis Professional (CBAP), Certified Business Architect (CBA)<sup>®</sup> and is BIAN, TOGAF, Azure Fundamentals, and SAFe Agile for Architects Certified.

**Bio:** Claire Wybrow is an Enterprise Business Architect working with Fortune 500 companies across multiple industries for over 20 years, with both internal corporate and consultant experience. Claire's work includes establishing foundations for enterprise evolution at multiple organizations, leading to multi-year and multi-million-dollar strategic partnerships. She has the proven ability to discern and deliver on the needs of both the Business Partner, the Provider and the Vendor and to elevate relationships to a strategic level while ensuring tactical delivery. Certified in PMP, CBPP and BRMP, Claire participates in the BA Guild Financial Services Reference Model Team and is a frequent speaker at PMI PDD, APQC Process Excellence, PEX, BRMI, BIL-T, Women in Architecture (WIA) and other events.

10:00 – 10:20 am | Break

10:20 – 11:05 am | **Transforming Strategy Development and Implementation Planning at a Government Agency Through Enterprise Architecture**

*Prabu Muthu, Director of Enterprise Architecture, Bonneville Power Administration (Dept. of Energy)*

*Anna-Lisa Miller, Senior Business Architect, Bonneville Power Administration (Dept. of Energy)*

**Abstract:** Bonneville Power Administration (part of the Department of Energy) developed a 5-year strategy firmly rooted in enterprise architecture, leveraging our models to accelerate implementation planning. This presentation will outline key components of Bonneville's enterprise architecture, including the business capability model, value streams, and current state landscape, each of which were purposefully built over the past 4 years, culminating in this breakthrough work. The presentation will also show how Bonneville used business architecture to support development of its 2024-2028 Strategic Plan and companion Implementation Plan. These plans call for significantly changing the alignment, preparedness, and governance, along with implementing a comprehensive roadmap of business and technology changes. The discussion will also walk through a series of dashboards that demonstrate business and technology impacts, strategic initiative risks, and examples of key early business wins for decision makers and managers across the enterprise. The session wraps up with a summary of key lessons learned and tips on what to do and what not to do if you are embark upon a similar journey.

**Bio:** Prabu Muthu has been Director of Enterprise Architecture for the Bonneville Power Administration (Dept of Energy) for the past 6 years, building an enterprise architecture practice from the ground up as part of a newly-created Business Transformation Office. Working with the senior leadership at the agency to bring discipline and objective strategic decision-making to both business and IT, Prabu established a team and an integrated practice that is having significant impact on the development and delivery of strategy across the enterprise. With a career background in IT and business in the private and public sector, his greatest satisfaction is being able to break down the complexity of a public sector utility into manageable, commonly understood pieces that can then be transformed to meet the needs of a diverse set of stakeholders.

**Bio:** As Senior Business Architect, Anna-Lisa Miller is responsible for developing agency capabilities as a way to understand and translate its strategic motivation into objective model elements that can be connected to the rest of the enterprise architecture. Anna-Lisa is responsible for facilitating conversations with a variety of stakeholders to elicit and validate essential business context and providing various visual analytics that can help tell stories that address important strategic concerns of the agency's decision-makers. She has a broad and deep background, crossing multiple areas and experiences working with internal and external stakeholders to establish focused on delivering business value.

11:15 am – Noon | **Business Architecture: A First Year Journey**

*Breanne Casteel, Business Architect, Kampgrounds of America (KOA)*

**Abstract:** Wonder what it's like to implement business architecture for your company? Come learn what the first year was like for Kampgrounds of America (KOA). After 60 years in the outdoor hospitality business, KOA was continuing to grow at an unprecedented rate, but with growth came growing pains. Business architecture promises better business agility, efficiency, and alignment, but what does that journey look like? During this

session you'll hear what implementation looked like, and the incredible value business architecture brought to KOA in its first year. The discussion will include highs and lows, journey of acceptance, initial deliverables, providing value while building the architecture baseline, and the mindset needed to succeed. Buckle up! It's a fun ride, but can get bumpy at times.

**Bio:** Breanne Casteel is a Business Architect for Kampgrounds of America (KOA). She is a passionate advocate to bring awareness of business analysis and architecture skills and mindset to numerous roles in the organization with an emphasis on communication, transparency, and collaboration across silos. Breanne has over 20 years of IT experience starting in computer programming and database management, to Quality Analyst, Business Analyst, then on to Business Architect. In addition to her Computer Science degree from Montana State University, she also has certifications from IIBA for ECBA, CPOA, and AAC.

Noon – 1:00 pm | Lunch

1:00 – 1:45 pm | Superpower of Service Designer and Business Architect Co-creation

*Richard Beeston, Senior Business Architect, UK Department for Work and Pensions*

*Helen Spires, Lead Service Designer, UK Department for Work and Pensions*

**Abstract:** The UK Department for Work and Pensions (DWP) is responsible for welfare, pensions, and child maintenance policy. As the UK's biggest public service department, DWP administers the State Pension and a range of working age disability and ill health benefits to approximately 20 million claimants and customers. This presentation will explain how service designers and business architects have worked closely together to develop the vision for transforming DWP from a product centric to user centric organization. The session will discuss how designers and architects came together to establish effective relationships, shared thinking, a common language, and common methodologies. The session will also show how this work led to an ambitious vision to transform our customer journeys to focus on value proposition-based outcomes that improve the customer experience, design out pain points and barriers, and design in empathy and compassion.

**Bio:** Richard Beeston has worked for the UK Government for 31 years in a wide variety of roles including L&D, instructions, job role and organizational design, operating models, IT design and delivery and business analysis. He has 4 years of business architecture experience, joining the Business Architecture Guild's Government Reference Model (GRM) group in Sept 2020. Rich is a Certified Business Architect (CBA)<sup>®</sup>.

**Bio:** Helen Spires is a Human-Centered Service Designer who loves to think in terms of systems and how co-creation can design better services in collaboration with the broader user community.

1:55 – 2:40 pm | Update on BA Guild Contributions to Open Standards

*Chalon Mullins, Director, Business Architecture Guild*

*Jim Rhyne, Director & Cofounder, Business Architecture Guild, Owner, Software Renovation Consulting*

**Abstract:** The purpose of the presentation is to inform the community of the outstanding work that has been done in the past few years by Guild members contributing to open standards relevant to business architecture. The first half of the presentation will focus on an open standard business architecture metamodel at the Object Management Group (OMG). The resulting specification, the Business Architecture Core Metamodel (BACM) represents a major milestone in making business architecture repeatable and consistent, specifically in context of automated tool support. The BACM overview will focus on benefits, content, and future plans. The second half of the presentation will focus on the work being done in collaboration with Open Group, where significant progress has been made updating The Open Group Architecture Framework (TOGAF<sup>®</sup>) based on business architecture community best practices. The update will highlight advancements that have brought TOGAF into closer alignment business architecture best practices. Future plans will focus on bringing BACM to the Open Group in hopes of creating even tighter alignment of business architecture best practices across open industry standards.

**Bio:** Chalon Mullins recently retired from Kaiser Permanente as a Principal Architect in the Chief Digital Office. Prior to Kaiser, Chalon served as an enterprise architect in the financial services sector at JP Morgan Chase, Charles Schwab, and Visa. He worked as a consultant at Lockheed Martin Advanced Concepts Center and EDS (now part of Hewlett Packard). Active in standards efforts at the World Wide Web Consortium and Object Management Group, Chalon currently services on the board of directors at the Business Architecture Guild, leading efforts to instill best practices into open standards. In his role at the Guild, Chalon has contributed to collaborative teams, including the metamodel team, customer experience team, and information mapping team. He initiated and led efforts to create a business architecture reference model for the healthcare provider industry.

**Bio:** Jim Rhyne is founder of Software Renovation Consulting (SRC), a consulting firm specializing in conceptual information modeling and business-led transformation of core application systems. Prior to founding SRC, Jim was a Distinguished Engineer and Chief Architect for the IBM Worldwide Banking Center of Excellence where he created a transformation framework for core banking systems and consulted with major banks in the US, Europe, Australia, and China. Jim has decades of architecture experience, including strategic architecture responsibilities for IBM CICS and mainframe application development tools. He was one of the founding architects for WebSphere and contributed to the J2EE and Java standards. Jim has a Ph.D. in Computer Science from the University of Texas at Austin, holds a number of patents, and has published papers on User Interface Technologies, Conceptual Modeling, and Software Analysis. He has advised hundreds of large businesses on IT transformation projects and technology selection. Jim is a Business Architecture Guild cofounder and Director, as well as a Certified Business Architect (CBA)<sup>®</sup>.

2:40 – 3:05 pm | Break

3:05 – 3:50 pm | Leveraging Guild Reference Models at AT&T Mexico

*Nathalie Pelser, Director of Enterprise Architecture, AT&T Mexico*

*Armando Arguello, Director of Enterprise Architecture, AT&T Mexico*

*Chris Armstrong, President/Chief Architect, Sparx Services North America*

**Abstract:** Seeking to mature its enterprise architecture practice, AT&T Mexico decided to leverage the Business Architecture Guild’s Telecom Reference Model as the foundation for delivering business architecture perspectives to executives and key decision makers. This presentation will outline the decision-making process that led to using the Telecom Reference Model and how its usage was integrated with the Open Digital Framework (ODF) from the TM Forum. The discussion will review mapping the Development Value Streams (from the Scaled Agile Framework – SAFe) used by the Digital Transformation Office for initiative planning to the Business Architecture Value Streams (aka “Operational Value Streams”). The discussion will also outline how the team completed Value Stream Stage-to-Capability cross-mappings not previously populated in the Guild reference model, along with Business Process and Logical Application mappings from the TM Forum Open Digital Framework (eTOM & TAM). Lastly, the presenters will review how this information was delivered in business-friendly visualizations to inform business strategy, portfolio investment priorities, and alignment and progress towards the future state architecture.

**Bio:** Ms. Nathalie Pelser is the Director of Enterprise Architecture at AT&T Mexico. Ms. Pelser has many years of experience establishing and leading EA teams, particularly in the telecommunications industry. Her recent focus at AT&T has been on elevating the Enterprise Architecture practice, implementing EA and Information Governance, and delivering an API management platform, an integrated platform development environment for microservices, an omnichannel digital experience platform, and a digital customer identity and access management platform.

**Bio:** Mr. Chris Armstrong, President of Sparx Services North America (SSNA), is an internationally recognized thought leader in business and enterprise architecture, systems and software engineering, and agile development. Mr. Armstrong represents SSNA at The Open Group, Object Management Group, Business Architecture Guild, and TM Forum. Mr. Armstrong is certified in TOGAF, ArchiMate, IT4IT, UML, and SysML,

**Bio:** Mr. Armando Arguello is the Director of Enterprise Architecture at AT&T Mexico. Mr. Arguello has many years of experience as consultant and leading IT teams particularly in the telecommunications industry. His recent focus at AT&T has been on Enterprise Architecture practice and specifically on Solution Architecture integrating the Scaled Agile Framework (SAFe) into the practice. Mr. Arguello is certified in SAFe Framework as Architect, Scum Master, Product Management, Product Owner, Release Train Engineer, DevOps and Agilist

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

*Panel Moderator: Ivan Blinov*

**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

##### **Business Architecture Innovation Summit Cochairs**

**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 Innovation Summit Day 1.

## Business Architecture Innovation Summit – Day Two (Wednesday, March 20, 2024)

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

### 8:50 – 9:10 am | Day Two Overview & Themes

#### Business Architecture Innovation Summit Cochairs

**Abstract:** The Guild Co-Chairs will provide an overview of day two along with themes covered during day one. The opening session will include answering any questions from day one.

### 9:15 – 10:00 am | Leverage Business Architecture to Envision Data and AI Use Cases

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

**Abstract:** AI and big data technologies change the landscape for economies, countries, and enterprises. They are disrupting traditional business models and pave the way for new innovative business models. But investing in these technologies is expensive and challenging and should be done with a sharp laser focus on strategic and operational impacts on the enterprise. The roadmap for the incremental development and deployment of the big data and AI technologies should be crafted in a way that optimizes positive impacts on business strategy, customer experience, and enterprise operating model. This session will introduce a business architecture approach to envision big data and AI use cases and develop a roadmap for developing, deploying, and operating these technologies.

**Bio:** Hassan Ahmed Hassan Mohamed is Head of Business Architecture at the Commercial International Bank of Egypt. Hassan was introduced to business architecture 6 years ago and exploded into the profession 3 years ago with courses and certification as a Business Architect. He established a business architecture practice for a large insurance company focusing mainly on capabilities, value streams, information, and working with multiple practices within the company to effectively integrate them across the enterprise. Hassan's background is primarily in IT where he has worked as a Manager, Business Analyst, creating a Business Analyst Competency Centre, Project Manager, Account Manager, and Scrum Master.

### 10:00 – 10:20 am | Break

### 10:20 – 11:05 am | Scaling an Enterprise-wide Business Architecture Practice

*Nivin Premkumar, Senior Manager, Enterprise Business Architecture, TD Bank*

*Mary Ann Rodil, Senior Manager, Enterprise Business Architecture, TD Bank*

*Asmara Mirza, Senior Manager, Enterprise Business Architecture, TD Bank*

**Abstract:** One of the challenges of building a practice is scaling it so it supports the complexities and dynamics of a large organization. Laying down a solid foundation for the practice – a base of knowledge that includes core domains, such as capabilities and value streams, tools that facilitate domain cross-mapping, resources with the right competencies and talent acceleration, and sponsorship to build a community of practitioners, drive adoption, and establish governance to set it up for success. The presentation will outline how TD Bank met the challenge by creating a standardized approach across the enterprise through common models, tools, and templates, ensuring traceability from business strategies through technology delivery. Adopting a business architecture tool enables a shift from conceptual understanding of the organization to a logical one, helps create robust, scalable domain models, allows users to roll up business unit models to an enterprise-level, and enables actionable insights. The session will conclude by showing how an enterprise business architecture team delivers value by aligning execution to business strategy to enable smarter investment decision making and accelerate targeted outcomes.



**Bio:** Nivin Premkumar is an experienced Business Architect, Change Agent, and Strategist. He is driven by his belief that great strategies require a greater focus on effective execution to achieve the promised results. Currently, he leads BIAN adoption at TD Bank and represents TD at the BIAN BCM Working Group. Prior to this, he led the transformation and innovation activities within Canadian Banking Technology at Scotiabank and on ensuring alignment between organizational strategies and developing target operating models within Corporate Transformation & Operations at TD Bank. He has been fortunate to have had opportunities to live and work across South Asia, Australia, and the Middle East. Nivin holds an MBA from York University.

**Bio:** Mary Ann Rodil has over 20 years of business and technology experience with extensive expertise in the areas of Digitization and Automation, Business Architecture, Business Process Management, Robotic Process Automation, Business Analysis, Object Oriented Analysis and Design, and Custom Application Development and Package Implementations. Mary Ann has a proven track record of delivering successful multi-site global solutions to a broad range of clients in North America and Tokyo, Japan.

**Bio:** Asmara Mirza is a dynamic, results oriented leader who builds scalable processes enabling Enterprise transformation across North America. She is passionate about voice and experience of employees and customers. She embraces challenges and seeks continuous improvements. She is known for change leadership and creating beneficial outcomes for all stakeholders through empathy, strong relationships, conflict resolution, and business acumen.

## 11:15 am – Noon | Organizational Change Management Using Business Architecture

*Lindsey Funair, Global Business Architect, Orbia Connectivity Solutions (Dura-Line)*

**Abstract:** The Dura-Line brand is part of Orbia, a community of companies working to tackle some of the world's most complex challenges. The Orbia brands are bound by a common purpose: to advance life around the world. Orbia Connectivity Solutions (Dura-Line), along with its sister companies, Building & Infrastructure, Precision Agriculture, Fluorinated Solutions, and Polymer Solutions, address six of the 17 UN Sustainable Development Goals: zero hunger, good health and well-being, clean water and sanitation, decent work, and economic growth, industry innovation and infrastructure, and sustainable cities and communities. This presentation brings attendees into Orbia Connectivity Solutions' year-one journey in starting a global business architecture practice for the purpose of building agility into organizational change management. Established in September 2023, the practice is modeled on the strategic alignment of people, structure, metrics, rewards, processes, interfaces, and culture. In 2024, Dura-Line brand's KPIs are focused on behavior, with a targeted customer perspective through a capability lens. To support this transition, change management tools are leveraged throughout the PMO to reimagine a more resilient, disciplined approach to intentional culture management.

**Bio:** As the Global Business Architect for Orbia's Connectivity Solutions (Dura-Line), Lindsey Funair supports the Orbia purpose of advancing life around the world through action. She works within the PMO team and across the business to enhance strategic operations, capability improvements, and KPI maturity. Lindsey's business architecture practice owns, sustains, and manages a structured business ecosystem to trace strategy through the organization via mapped metrics, key results, capability models, data flow, value streams, human decisions, automated decisions, business rules, and process workflows. She holds a Masters of Management in Strategic Management and Executive Leadership from the Smeal College of Business at Penn State and a Bachelor of Arts in Business Administration from the Foster School of Business at the University of Washington in Seattle.

Noon – 1:00 pm | Lunch

## 1:00 – 1:45 pm | Holistic Value-Centric Planning Using a Capability-Based Approach

*Benjamin Senecal, Director, Business Architecture, USAA*

*Albert Ruiz, Business Architect Senior, USAA*

**Abstract:** The critical element missing in successful strategy execution is complete and effective investment planning. Too often, investments are myopic, IT-centric, and do not sufficiently ensure interoperability with other systems, processes, and workflows. This in turn leads to project execution delays, cost overruns, and scope increases. A more impactful approach is to provide a cross-functional view of value, how that value is delivered, and all the required capabilities, teams, and systems needed to deliver it. Scoping initiatives based on end-to-end value streams ensures that the right stakeholders are engaged in solution design and project planning, and all the changes involving people, process, technology, and information are identified. Enterprise and business architecture is most effective when engaged early in project concept development. Focusing on identifying business capability maturity across the value stream helps identify potential courses of action, initiative execution risks, dependencies, and collaboration opportunities. This session will walk through examples of USAA's Strategy-to-Execution methodology to decompose business strategy, identify change impacts, identify business/technology capability gaps, and drive capability and IT investment planning.

**Bio:** Ben Senecal is Director, Business Architecture at USAA Bank. He currently serves in the transformation office where he leads business architecture development, agile transformation, and operational risk management. Ben is responsible for managing the business process and value stream inventory, supporting delivery of Bank products and services. He previously led the operating model design to support organizing teams around value and facilitating agile ways of working and the development of enterprise-wide data and analytics to support USAA marketing programs. Prior to joining USAA, Ben held roles as a Business Analyst at Tribune, Business Performance Manager at Robbins-Gioia, and Senior Consultant at KPMG. He served 5 years in the U. S. Navy Nuclear Propulsion Program as an engineering officer. Ben is a certified SAFe 6.0 Agilist, Certified Scrum Master, and Project Management Professional (PMP), and has a Masters in Engineering Administration from Virginia Tech and Bachelors in Mechanical Engineering from the University of Texas at San Antonio.

**Bio:** Albert Ruiz is a Senior Business Architecture at USAA, a military financial institution. At USAA, Albert works in process engineering and business architecture, where he works with a team to build out USAA Bank's Business Architecture practice. Prior to USAA, Albert served 5 years of active service in the United States Naval Academy, along with 20 years in the Navy Reserves where he held positions as an engineering officer, operations officer, researcher, and commander. As a civilian, he worked as a semiconductor engineer, chemicals manager, government infrastructure consultant, and engineering director. In many of those roles Albert was given the opportunity to build things, including men, new departments, infrastructure, and machines. Albert has a strong commitment to serving others, building teams, and creating new ways to improve things.

## 1:55 – 2:40 pm | What to Expect When You're Expecting a Business Architecture Practice

*Ben Fust, Business Architect, Voya Financial*

**Abstract:** It's hard to sell an ice cream cone in the middle of winter and it's hard to start a business architecture practice when people don't recognize they need one. How do you help them see the value in it? How do you help broaden the lens, magnify the stories within the sinews, and get everyone to speak the same language? You get practical. You earn the right to show what you can do. You use the business architecture tools and view of the world to make a tangible difference today so you can have the influence to shape tomorrow. The business architecture journey at Voya Financial has been one of fits and starts, of progression and regression. And even today, our practice is not established, it is establishing. But this journey has taken us from "What is a Business Architect?" to "I'm not sure why but we should definitely include the Business Architect team in this discussion". From influencing data models, evaluating AI opportunities, and helping the business find their voice, the practice has gained prominence by remaining practical. This presentation will share where the practice has



found success, where it has not, and how the team plans to grow the practice.

**Bio:** Ben Fust is responsible for business architecture at Voya Financial. With Voya for over 20 years, Ben has had many roles including uncredited janitorial duties at the now decommissioned Des Moines site and point person for 2 am phone calls with the Dutch office. Ben holds a bachelor's degree from Simpson College in Indianola, IA as well as a decaf coffee, most of the time.

2:45 – 3:05 pm | Break

3:05 – 3:50 pm | **Architecting Success: The Dynamic Duo of Business Architecture and Formal Product Management Framework**

*Emma Sorteberg, Enterprise Business Architect, Surescripts*

*Jeff Taylor, Enterprise Business Architect, Surescripts*

**Abstract:** This session explores the powerful integration of business architecture and a commercially available, market-driven product management framework, which emphasizes understanding market needs, effective product development, and successful market launches. The session will discuss how business architecture, with its emphasis on aligning business goals and structures, can be seamlessly woven into this framework, leading to more efficient, successful solution launches. The session will uncover 3 major benefits of convergence; enhanced strategic alignment, product development, and resource allocation, which collectively lead to achieving greater market success. Experience has shown that leveraging a software management tool can ease this integration. The discussion will, therefore, aim to demonstrate how such a tool can enhance product roadmap visibility, improve organizational progress tracking, and document strategic alignment. Finally, this presentation is a call to action for organizations to embrace the integration of business architecture and a successful product management framework as a catalyst for achieving their strategic goals and delivering products that resonate with the market.

**Bio:** As an Enterprise Business Architect at Surescripts, Emma Sorteberg brings a profound passion for enhancing the healthcare journey for patients and caregivers. With 8 years of experience in the healthcare industry, Emma has held several roles within product management. Emma excels in translating complex technical details into practical business solutions, ensuring alignment with customer needs. In her personal life, Emma regularly dedicates her free time to maintaining a healthy and active lifestyle.

**Bio:** Jeff Taylor, a dedicated Enterprise Business Architect at Surescripts, is passionate about driving interoperability through industry standards for all network stakeholders. As the lead orchestrator of the corporate strategy at Surescripts, Jeff's vision is to transform healthcare data exchange. With 2 decades of rich experience in the healthcare sector, Jeff has ventured across diverse domains, from developing software for FDA-approved medical devices to orchestrating requirements and design for Electronic Health Record (EHR) systems.

4:00 – 5:00 pm | **Business Architecture Tool Vendor Panel: Updates and Insights**

*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**

**Business Architecture Innovation Summit Cochairs**

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

**6:00–8:00 pm | OMG Sponsored Evening Reception**

## Business Architecture Innovation Summit – Day Three (Thursday, March 21, 2024)

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

### 8:45 – 9:10 am | Business Architecture Resources & Engagement

#### Business Architecture Innovation Summit Cochairs

**Abstract:** The Guild Co-Chairs will discuss content, reference models, training resources, working groups, and other opportunities available to members of the Business Architecture Guild and answer relevant questions on the topics.

### 9:15 – 10:00 am | Embedding Strategic Insight into Initiative Portfolio Planning

*Juliane Berger, Head of Business Architecture, Allianz Commercial*

**Abstract:** Allianz Commercial's business architecture practice has been expanding into the field of change portfolio planning in the past year. This session will shed light on how the portfolio planning process functioned in the past: a rather democratic approach, distributing available change budget based on subjective pitching by functional business leaders who raised their individually-perceived biggest improvement needs. From a business architecture perspective, the approach lacked objectivity and holistic thinking. With business architecture invited in for 2024 planning, we will share how we introduced quick-win strategy mappings, to increase understanding of overall portfolio impact on strategic objectives – and for the first time, providing objective, cross-functional views to otherwise rather narrow budget allocation discussions. Further, the session will show how the business architecture practice is now striving to mature its contribution to increasing strategic alignment of change.

**Bio:** Juliane Berger is leading the business architecture practice at Allianz Commercial. She has been a long-time certified practitioner, actively engaging in and contributing to international business architecture networks. Previously she held roles with Allianz and BMW Group in project management and business architecture. Juliane is a Certified Business Architect (CBA)<sup>®</sup>.

### 10:00 – 10:20 am | Break

### 10:20 – 11:05 am | Applying Sustainability Directives using Business Architectures in Financial Industry

*Divyansh Alleppa, Digital Delivery Lead, HSBC*

**Abstract:** Global economies are increasingly embracing sustainability while also facing a surge in sustainability related regulations. Sustainability has become a pervasive theme across various business sectors, influencing the introduction of new financial products and encouraging existing customers to declare and receive recognition for their sustainability efforts. Coupled with EU Sustainable Finance Directive Reporting, these demands are forcing financial institutions to change how they operate and meet disclosure requirements that seek to establish trust among institutions. A well-structured business architecture practice is vital for effectively addressing these emerging regulations and meeting the demands of customers and the business community. This includes development of capability models, value streams, and information maps tailored to accommodate sustainability-related requirements. These tools provide a transparent and structured approach for financial institutions to proactively navigate the complex landscape of regulatory priorities, ensuring they can adapt and remain compliant in an ever-evolving sustainability-driven business environment.

**Bio:** Divyansh Alleppa is a Digital Delivery Lead for Wholesale Banking in HSBC, his area of expertise includes Strategy Execution, Digital Transformation in Payments Services.

## 11:15 am – Noon | A Framework for Startups Using a Business Architecture Reference Model

*Lene Østerberg, COO, Linconomy*

**Abstract:** Startups are very limited on both resources both human and capital. It is important that they structure their business so it works most efficiently and have the right capabilities in order to succeed. Further, it is important to demonstrate to potential investors that they have a business model that is sustainable and can scale. Business architecture offers the right framework for startups to develop these concepts. Startups can leverage reference models of essential value streams and capabilities that help structure a new organization, design business processes, and align systems and technology. This presentation will demonstrate how a startup framework can benefit a startup by enabling it to accelerate time to market and launch products and services more quickly. The framework is a blueprint of the business that can help reduce costs and secure efficient development of the business. The framework improves agility and is designed to help scale a business efficiently and adapt to change quickly.

**Bio:** Lene Østerberg is COO and Founder at Linconomy – A Wealth Management Digital Platform. She is Board member at COOP Bank – A small Danish retail bank. Lene has previously worked as Chief Operating Officer at Nordea Life and Pension and held several managerial positions in Nordea Bank, Capital Markets. She has driven and facilitated the business architecture methodology and implementation throughout Wealth Management and Capital Markets in Nordea and played an important part in getting business architecture on the executive agenda in Nordea.

## Noon – 1:00 pm | Lunch

## 1:00 – 1:45 pm | A Business Architect's Journey to Making an Impact

*Dennis Riedel, Business Architect, TRUMPF SE & Co. KG*

*Daniel Simon, Managing Director, Across & Ahead Advisory GmbH*

**Abstract:** This session is about a beginner's and "lone warrior's" journey in business architecture. The story begins with first contact with the BIZBOK® Guide along with initial attempts at using capabilities to structure digitalization initiatives and provide application landscape overviews. The story continues with solid business architecture training and certification, participation in an industry reference model team, and development of proper business architecture use cases and a top management pitch. The session will illustrate how value stream, information concept, and capability cross-mappings were used to target initiatives based on a poorly developed, poorly automated internal value stream, driving successful implementation of these initiatives. Finally, the presentation sheds light on how these insights helped inform strategic investment decision-making and how this in turn provided the basis for communicating business architecture value to top management.

**Bio:** Dennis Riedel works as business architect and project portfolio manager at TRUMPF, a market and technology leader in machine tools and lasers for industrial manufacturing. Starting his professional career as a software developer in the media industry, he soon moved into IT project and program management. Since his transition to the manufacturing industry in 2017, he helps TRUMPF with its ongoing digital transformation with focus on business strategy, project portfolio, and business process management in marketing, sales and order fulfillment. He holds a degree in computer science. Dennis is a Certified Business Architect (CBA)®.

**Bio:** Daniel Simon is Founder and Managing Director of ACROSS & AHEAD. His passion is to guide enterprises on their business design and transformation journeys. He has extensive experience in establishing architecture practices, developing architecture blueprints, and facilitating business design and transformation activities. Daniel is also a long-time trainer in the field. Among others, he has been running courses on business architecture and architecture storytelling for many years. Daniel holds a Ph.D. from the University of Cologne. He is the (co-)author of various publications on business architecture and enterprise architecture and regularly

speaks at conferences and events. Daniel is a Certified Business Architect (CBA)<sup>®</sup>.

**1:55 – 2:40 pm | Building a Bridge across the Business and IT Chasm**

*Jo Gilmore, Sr. Manager/Capability Lead, Strategy Alignment and Architecture, Centric Consulting*

*Stacia Geib, Sr. Manager, Strategy Alignment and Architecture, Centric Consulting*

**Abstract:**

In this session, the speakers will share real-life stories across industries where there were unintentional chasms between IT and business partners. What was the root cause of the problem? They did not speak a common language. IT knew the power of their technology platforms and the business knew the innovation needed to delight their external and internal customers. They just couldn't find a common bridge to jointly solve the many challenging market, customer, and company problems. Join us as we explore universal pain points and how business architecture bridged the chasm and enabled alignment. We will highlight outcomes that include utilizing business architecture best practices that include strategy alignment, value stream and capability mapping, maturity priorities, people change strategies, and execution roadmaps.

**Bio:** Jo Gilmore is a Senior Manager and Capability Lead in Centric Consulting's Strategy Alignment and Architecture practice. She is responsible for maturing the StratATecture™ delivery methodology, leveraging strategy, operating model design, and business architecture practices. Prior to Centric, Jo spent 17 years at FedEx working on large-scale product development and business agility efforts. She is a Certified Business Architect<sup>®</sup>, OKR Coach, and SAFe Practitioner. Jo sits on the Business Architecture Guild Council of Executive Advisors as well as the Certification Committee.

**Bio:** Stacia Geib is a customer-focused business leader with 25 years of diverse leadership roles designing strategies that solve complex problems and then translate them into action. She has guided and architected transformation initiatives in multiple roles and industries including enterprise transformation (process, technology, and data) and different levels of product, go to market, manufacturing, and supply chain transformations.

**2:40 – 3:00 pm | Break**

**3:00 – 3:45 pm | Business Architecture Based Roadmap Planning at Salesforce**

*Rajasekar Thangaraj, Senior Enterprise Business Architect, Salesforce*

**Abstract:** In recent years, Salesforce has undergone remarkable growth, prompting the need for the establishment of strong Enterprise and Business architecture processes. The primary goal was to institute clear architectural principles, ensuring uniformity in practices across the organization, aligning strategic planning with well-defined business capabilities and value streams, and guaranteeing the congruence of strategy and execution with business priorities. This abstract illustrates how Salesforce effectively utilized business capabilities for roadmap planning spanning various departments. The approach involved leveraging various elements of business and enterprise architecture to formulate a 3–5-year roadmap that aligns with the organization's vision and strategic focus areas.

**Bio:** Rajasekar Thangaraj is Senior Enterprise Business Architect 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 is a Certified Business Architecture (CBA)<sup>®</sup>, TOGAF EA Foundation Certified, Certified Product Owner, Leading SAFe, and PMP Project Management Professional.

3:55 – 5:00pm

| Business Architecture Leadership Panel

*Chaired by Mike Rosen, Wilton Consulting-Retired, Director & Co-founder Emeritus, Business Architecture Guild*

**Abstract:** Three days of Summit presentations and discussions often lead to new insights and new opportunities for innovation. But for many, the Summit can also trigger a variety of new questions. The Business Architecture Leadership Panel assembles industry leaders and experts to discuss what was covered over the course of the 3-day summit, address attendee questions and, where appropriate, point attendees to additional resources where they can continue their business architecture journey. Please join us for the insightful discussions that ensue and help bring the Summit to a successful close.

5:00pm– 5:15

| Co-Chair's Closing Remarks

**Business Architecture Innovation Summit Cochairs**

**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 activities beyond the Summit. The closing session will take last minute questions and preview opportunities to engage in future Summits and beyond.