

## Business Architecture Innovation Summit – Day One (Tuesday, March 18, 2025)

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

### 8:45–9:15 am | Welcome Address: Business Architecture Innovation Summit 2025

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

*Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Director 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 Co-Chairs will share recent 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, AI related impacts and directions for the year ahead.

**Bio:** William Ulrich is a management consultant, mentor, author and workshop leader. He is President of TSG, Inc., Principal Instructor at Business Architecture Associates, Cofounder and Board Member of the Business Architecture Guild and Co-Chair of the OMG Architecture-Driven Modernization Task Force. He is also a Certified Business Architect (CBA)<sup>®</sup>.

**Bio:** Whynde Kuehn is the Managing Director at S2E Transformation Inc. and a long-time practitioner, educator and thought leader. She is also a Co-Founder, Board Member and Academic Committee Chair of the Business Architecture Guild, a Principal Instructor 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 (CBA)<sup>®</sup>.

### 9:15–10:00 am | Establishing a Strategic Business Architecture Practice: The Journey & Lessons Learned

*Stephanie Ramsay, Associate Director, Enterprise Architecture & Strategy, RTX*  
*Stefan Heline, Senior Manager, Business Process Management, Pratt & Whitney*

**Abstract:** Establishing a strategic business architecture practice is hard. Challenges include determining where business architecture fits in the organization, its business value, where the knowledgebase resides, how best to govern a practice, how the team communicates, critical partner relationships, and what framework to use. When these questions start getting answered, the challenges diminish and the practice begins paying dividends. This presentation will take the audience through the RTX (Raytheon, Pratt & Whitney, and Collins Aerospace) business architecture journey and lessons learned along the way.

**Bio:** Stephanie Ramsay has worked for more than 30 years in information and digital technology, with extensive experience in applications, infrastructure, and service delivery in aerospace and defense, healthcare, and retail. Her education includes: a Bachelor of Science in Business, and a Master's degree in Supply Chain Management. She is a Master Certified Architect. Strong competencies include enterprise architecture, portfolio management, business relationship management, digital product and service management, and sourcing and supplier management. She co-leads the Business Architecture Guild Manufacturing Reference Model team and leads the Business Architecture practice at RTX.

**Bio:** Stefan Heline is an experienced thought leader in business and technology transformation with 35+ years in digital technology, business process management, and operational excellence, delivering business solutions in manufacturing, insurance, financial services, pharmaceuticals, and government. Stefan is an active contributor to the advancement of project management, agile transformation, change management, knowledge management, and business architecture at Pratt & Whitney and RTX. He holds a Bachelor's of Science in Electrical Engineering and Masters of Science in Operations Management.

10:00–10:20 am | Break

10:20–11:05 am | **How Reference Models Accelerated the Collins Aerospace Business Architecture Journey**

Brian Blass, Senior Manager, Business & Application Architecture, Collins Aerospace

**Abstract:** Collins Aerospace began a formal business architecture journey in 2023 with a renewed focus on the building blocks of business capabilities and value streams. After several disappointing starts and stops, the team elected to leverage the Business Architecture Guild's Manufacturing Reference Model for capabilities and value streams. This simple decision has yielded impressive progress for Collins and has allowed the team to shape our business architecture journey so that it resonates with our business stakeholders.

**Bio:** Brian Blass serves as a leader throughout RTX and industry within Enterprise Architecture. Business Architecture is an underserved area within EA and one that he intends to lead in developing to ensure organizational strategy is linked to architectural work through execution.

Brian started in 2004 working digital technology for a telecommunications company before transitioning into higher education and hospitality management IT. He joined Collins Aerospace in 2014 in IT Service Management and Enterprise Architecture. Brian currently leads the unification of the customer experience, Business Architecture adoption, and SAFe transformation and adoption.

11:15 am–Noon | **Leveraging Business Architecture to Accelerate and Improve Merger & Acquisition (M&A) Integrations**

*Alexandre Kouptsov, Senior Manager, Business Architecture, Thomson Reuters*

*Erika Merizzi, Director, Business Architecture, Thomson Reuters*

**Abstract:** M&A integration strategies at TR have often been constrained by a focus on people and technology within functional silos, neglecting critical business capabilities and customer pain points, while delaying relevant business decisions. To address these limitations, TR leveraged business architecture to enhance integration planning and related outcomes. This session will delve into TR's approach for developing high-level, end-to-end views of both its own and the target company's operations. The approach has proven effective in identifying operational overlaps and differences against TR's "Global Design" standards, thereby expediting critical decisions, accelerating the

integration process, and ensuring alignment with an emphasis on delivering a positive customer experience. By adopting this comprehensive, cross-functional approach, organizations can significantly improve the efficiency and effectiveness of M&A integrations, ensuring that critical business capabilities are not overlooked.

**Bio:** Alex Kouptsov is a senior business architect at Thomson Reuters (TR). He supports the organization and its senior stakeholders by enabling better strategic decision-making, prioritization, and business design at TR through the application of business architecture frameworks. Prior to TR, Alex worked as a management consultant at Deloitte where he served global clients across various industries, including professional services.

**Bio:** Erika Merizzi is a director in Thomson Reuters (TR) business architecture team within which she leads the customer journey mapping proposition to help TR's stakeholders identify and address customers' pain points. As part of that, Erika and her team leverage business architecture frameworks to drive enterprise-wide alignment at the business capabilities level. Prior to joining TR, Erika worked as a management consultant at Deloitte.

Noon–1:00 pm | Lunch

1:00–1:45 pm | **Catalyzing Change: AI's Role in Accelerating Business Architecture Maturity**

*Christopher Lundy, Senior Principal Enterprise Architect, Pfizer*

**Abstract:** AI is fundamentally reshaping enterprise architecture, driving a new era of business capability alignment and value stream orchestration. This session will explore how AI-driven capabilities are advancing business architecture maturity, enhancing alignment, and unlocking new efficiencies across organizations. AI enables continuous refinement of capability roadmaps, leveraging predictive analytics and adaptive learning to dynamically prioritize capabilities that deliver the highest value. This advancement allows enterprise architects to make data-driven, agile decisions that respond to market shifts and organizational changes with greater precision and speed. In addition, Value Stream Orchestration leverages AI to optimize value delivery across the enterprise by automating bottleneck detection, adjusting resource allocation in real time, and ensuring a seamless flow across all functions. This session will offer actionable insights and best practices for integrating AI into business architecture to drive scalability, resilience, and enterprise-wide alignment.

**Bio:** Christopher Lundy is a transformative leader and strategist with over 20 years of expertise in enterprise architecture, cloud modernization, and AI-driven solutions across biotechnology, pharmaceutical, and retail sectors. He has a proven track record of driving innovation, building high-performance teams, and executing complex, high-impact programs within budget and timelines. At Pfizer, he led initiatives like the development of a \$500M ADC manufacturing plant, implemented an automated GxP process to reduce production times, and introduced PfizerVerse, a virtual environment accelerating R&D work. His work has modernized 8 million square feet of research labs and pioneered a Large Language Model (LLM) that revolutionizes drug discovery.

1:55–2:40 pm | **The Business Architect: The Accidental Product Manager**

*Honglei Zhou, Senior Business Strategist, Salesforce*

**Abstract:** The intersection of business architecture and product management has never been more critical than in today's rapidly evolving digital landscape. This session will explore how business architecture provides the structural foundation for successful product management, offering a clear line of sight from business goals to product outcomes, including how business architects can

collaborate with product managers to ensure strategic alignment, operational efficiency, and measurable results. The session showcases a case study discussing the role of the “Accidental Product Manager” that highlights how business architecture drove successful outcomes by bridging gaps between business strategy and product execution. The session additionally explores ways to adapt traditional business architecture frameworks to support AI-driven capabilities. Bridging the gap between business strategy and product delivery helps ensure that AI and other emerging technologies are leveraged effectively to create future-ready organizations.

**Bio:** Honglei Zhou is a seasoned Business Architect with over 20 years of experience in banking, capital markets, and insurance. She has a proven track record of driving digital transformation and strategic innovation for leading global organizations. As a Senior Digital Transformation Strategist at Salesforce's Professional Services, Honglei advises top banking and asset management clients, developing business capability roadmaps and ensuring alignment between business goals and technology investments. Previously, she held key roles at Royal Bank of Canada, Moody's Investors Services, and Barclays Capital, where she led complex, multi-year transformation programs. Honglei's expertise spans business strategy, governance, enterprise architecture, and risk management, with a focus on leveraging emerging technologies, including AI and predictive analytics, to enhance the customer experience. She is a Certified Business Architect, received her AI Product Manager designation from the Product School, and holds an MBA from New York University's Stern School of Business.

2:40–3:05pm | Break

3:05–3:50 pm | The Role of Business Architecture in Higher Education

*Dana Miller, Lead Architect, Mitrofanina*

*Kemail Dogan, Business & Enterprise Architect, Predictive Maintenance*

**Abstract:** The presentation will provide an overview of the current use of business architecture in higher education. The adoption of business architecture in higher education lags behind the corporate world, but there is a growing interest in the value business architecture can bring to the higher education community. The Business Architecture Guild recently held a Master Series workshop to explore business architecture options for higher education. This workshop, in turn, led to the launching of a Guild Higher Education Reference model team that will seek to formalize a business architecture baseline. This session will share insights on how a higher education reference model can contribute to moving the academic community to a new plane of operational excellence.

**Bio:** Dana Miller is an independent business architecture consultant working toward his Certified Business Architect designation, with over 30 years of IT experience in higher education. In 2017, Dana founded the ITANA Business Architecture Working Group (IBAWG), fostering collaboration among higher education organizations to advance business architecture. IBAWG collaborates closely with the Higher Education Reference Models (HERM) Working Group. Dana serves as co-lead for the Business Architecture Guild's Higher Education Reference Model Team. He has presented, authored, and co-authored work on enterprise/business architecture and quality management for organizations such as EDUCAUSE, CAUDIT, The W. Edwards Deming Institute, and multiple academic universities and conferences. Dana is certified as an Enterprise Architect through the Enterprise Architecture Center of Excellence (EACOE).

**Bio:** Kemail is an experienced business and enterprise architect with extensive experience in international projects. He brings extensive specialist knowledge in strategic and operational enterprise architecture management activities. Kemail's project experience ranges from optimizing

requirements management systems to comprehensive implementation projects. He has worked in education, finance, telecommunications, automotive, food, and logistics. Kemail also has experience in communication, moderation, and management of complex projects, specializing supporting customers in transformation and development projects. Kemail serves as co-lead for the Business Architecture Guild's Higher Education Reference Model Team. He continues to support companies in building efficiencies and leading successful efforts for digital change.

#### 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 companies, international development organizations, manufacturing, transportation, telecommunications, and a generic baseline common model. These models, along with corresponding companion guides to support their use, have been built by Guild members from a wide variety of industry sectors. This panel will discuss what is available, how they evolve, what the future holds, and what it is like to participate in 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*

*Co-Chair: Whynde Kuehn*

*Co-Chair: Mike Rosen*

**Abstract:** The Guild Co-Chairs will recap and open the floor to discuss feedback and questions from Innovation Summit Day 1. They will additionally preview Innovation Summit Day 2.

## Business Architecture Innovation Summit – Day Two (Wednesday, March 19, 2025)

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

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

*Co-Chair: William Ulrich*

*Co-Chair: Whynde Kuehn*

*Co-Chair: Mike Rosen*

**Abstract:** The Guild Co-Chairs will provide an overview of day two along with themes covered in these sessions.

### 9:15–10:00 am | Leveraging Business Architecture for Risk and Compliance Management

*Ben Senecal, Director, Business Architecture, USAA Bank*

*Mary Sipich, Business Architect Lead, USAA Bank*

**Abstract:** The financial services industry devotes considerable time and resources to mapping regulatory requirements, developing internal controls, and resolving compliance gaps. Traditionally, regulatory policies along with compliance gaps have been mapped to business processes for purposes of control and policy enforcement. The overall approach is very operationally oriented, resulting in duplicative controls across business units. By contrast, linking policies and issues to value streams and capabilities provides a strategic approach to addressing policy compliance and issue resolution. Starting with a business architecture-oriented macro view enables common themes to be identified, allowing business leaders to pinpoint critical investment opportunities and quickly set related priorities. This session will examine a banking example of how to visualize the business ecosystem, leveraging business architecture to identify the most critical issues and policy gaps, along with related capabilities, risks, and controls. This business architecture approach additionally streamlines efforts to establish well defined target state designs aimed at addressing critical compliance issues.

**Bio:** Ben Senecal is a Director, Business Architecture at USAA within the Bank. He currently serves in the transformation office leading the Bank's business architecture practice and the talent responsible for strategy translation, business plan and roadmap enablement, and portfolio prioritization support. He is responsible for managing the business capabilities and value stream inventory in support of delivery of Bank products and services. Previously, Ben directed the implementation of an operational excellence program focused on instilling disciplined practices and routines around member experiences, while ensuring regulatory compliance and risks are effectively managed. Prior to joining USAA he worked at the Tribune, Robbins-Gioia, and KPMG. Ben served five years in the U. S. Navy Nuclear Propulsion Program as an engineering officer.

**Bio:** Mary Sipich is a Business Architect Lead within Bank Transformation. She is a Certified Business Architect, responsible for the development of the Bank's business architecture to assess strategic impacts and plan current-to-target state transformations. Mary previously worked in USAA's Transformation and Integration area. She was engaged in numerous efforts in P&C, including the Car Buying Experience, Organizational Design, and Agency and Alliance Services Design. Mary brings with her a 22-year career from State Farm Insurance where she worked in various IT, operations, and business roles. Mary graduated from Benedictine University and received her Bachelor's Degree in Organizational Leadership in December 2013.

10:00–10:20 am | Break

## 10:20–11:05 am | Where the Rubber Meets the Road Less Traveled

*Ben Fust, Business Architect, Voya Financial*

**Abstract:** You're a business architect trying to establish a practice within your organization. You've spent time building relationships, peppered terms from the business architecture lexicon into conversations to build familiarity, and established some useful artifacts that don't really get used that often (or at least not to their fullest extent). Where do you go from here? How do you go from being a champion for the potential value of business architecture to tangibly and effectively delivering it? When business architecture covers such a wide range of value for a variety of stakeholders, where should you focus your efforts? What would your "Year of Value" look like? Our Year of Value was 2024. This session share where our organization focused its efforts to move the value needle for business architecture for the business. If all goes to plan, you can learn from our successes, avoid our shortcomings, and use our experience as a springboard for your own Year of Value.

**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.

## 11:15 am–Noon | Two Architects Walk into a Business Brainstorm

*Jonathan Neuse, Lead Technical Architect, USAA*  
*Eric Morgan, Transformation Consultant, Volant Advisors*

**Abstract:** This session offers up an educational skit, "Two Architects Walk into a Business Brainstorm", which is a humorous, structured walkthrough of the SAFe lifecycle, demonstrating how business and technical architects collaborate with product owners to shape a successful initiative from vision to execution. The objective is to highlight the value business and technical architects bring to the early stages of business initiatives, emphasizing their roles in clarifying business objectives, aligning technology strategies, and establishing a roadmap that meets strategic goals. The skit covers key value items such as defining the user journey, setting business objectives, mapping value streams and capabilities, identifying and prioritizing changes, and creating a roadmap that aligns with both business and technology strategies, ultimately bringing an imaginative concept to life through disciplined collaboration.

**Bio:** Jonathan Neuse is a Principal Technical Architect with USAA. In his 16 years serving as a technical architect, he has supported USAA's Call Center, Human Resources, Banking, and Property and Casualty organizations. Jonathan has made numerous contributions to USAA's technical architecture practice over the years including our formal technology management and architecture standards processes. For the last 2 years, Jonathan has been a member of the core team evolving USAA's Enterprise Architecture practice.

**Bio:** Eric Morgan is a seasoned business architect specialized in transforming complex enterprise challenges into actionable, strategy-aligned initiatives. He is passionate about bridging the gap between an organization's current state and its strategic goals and objectives. Eric's professional

experience spans business and technology leadership roles in healthcare, insurance, manufacturing, telecommunications, regional utilities, and financial services. This diverse experience makes him uniquely suited to align business needs with technological advancements, driving transformative outcomes for the enterprises he supports. Eric is a Certified Business Architect (CBA)<sup>®</sup>.

Noon–1:00 pm | Lunch

1:00–1:45 pm | Vienna Insurance Group's Business Architecture Journey

*Roumen Ivanov, Enterprise Business Architect, Vienna Insurance Group (VIG)*

**Abstract:** The Business Architecture Practice in VIG is relatively new – successfully introduced in 2023 on a VIG Holding level with “Bebauungsplan”. The scope was expanded in 2024, targeting VIG subsidiaries with extensive internal business architecture training. Actions included setting up of a reference framework, rolling out a methodology, and planning and executing pilot projects with several innovative VIG companies. The effort followed a formal, stepwise approach starting with a business architecture baseline of the core business architecture, mapping it to the as-is IT architecture, and aligning strategic business and IT transformation work with this formal business and IT architecture landscape. Supporting efforts included building up VIG’s business architecture community and knowledgebase to enable intragroup collaboration and the sharing of best practices across the enterprise. This session will present the major prerequisites, milestones, and challenges involved in this large-scale corporate and cultural transformation.

**Bio:** A Certified Management Consultant and Certified Business Architect<sup>®</sup>, Roumen Ivanov brings over 20 years of proven experience in planning, designing, and delivering large-scale, cross-organizational digital transformation programs for leading high-tech and financial groups in Central and Eastern Europe. Since September 2023, Ivanov has been serving as an Enterprise Business Architect with VIG IT Digital Solutions, where he leads the establishment and rollout of the Business Architecture Practice across Vienna Insurance Group—the leading insurance group in Central and Eastern Europe, with more than 50 subsidiaries in 30 countries.

1:55–2:40 pm

Drift Mining: How Design Debt Measures Deviation from the Target Architecture and Steers a New Course

*Andrew Jamieson, Lead Business Architect, National Savings and Investments (NS&I)*

*Stephen Parkinson, Lead Business Architect, His Majesty's Courts & Tribunals Service (HMCTS)*

**Abstract:** Business architects know how to analyze the current state of the architecture and set a course for where we want it to be, but when the rubber hits the road, it doesn't take long to skid off track. We developed a framework to assess this drift and design debt, an analogy to technical debt. This tool, although usefully showing unplanned change against capabilities and value streams, implied that the deviations from the target state presented a problem that needed to be fixed. Often, this was not achievable or even desirable and led to stakeholder resistance. Taking the principles from capability maturity assessments, we developed a new approach that continuously assesses the impacts of changes and charts new paths for the target architecture. This has led to increased understanding of how seemingly small tactical decisions in change projects can have big impacts on the overall functioning of the business. This session presents the journey we took leveraging this framework in its final form the related operating model impact assessment.

**Bio:** Andrew has been a business architect for almost 5 years, having started to unconsciously apply it as a business analyst for a merger program. He went on to hone this in roles in the UK Courts



Service and National Savings and Investments, where he achieved Certified Business Architect® status. In this time, he has had experience applying business architecture to major governmental change programs, organizational restructuring, complex problem resolution, and strategy formulation and delivery.

**Bio:** Stephen is a Certified Business Architect®. He has always thought architecturally to solving the problems of the public sector looks at the wide angle, before narrowing down the steps to resolve it. He has worked in many government departments, from the Insolvency Service to the Department for Work and Pensions, where he developed a Life Architecture approach to supporting vulnerable families. Currently in the UK's Courts Service, Stephen is strengthening strategy delivery through a continuous cycle of delivering change anchored in the business architecture, using it to identify areas for investment and measure change impact.

2:40–3:05 pm | Break

3:05–3:50 pm | Nuts and Bolts Advice on Modeling Business Architecture using ArchiMate

*Tim Hale, Enterprise Architect, Arvest Bank Group*

**Abstract:** Tim will present Arvest's approach to modeling business architecture concepts from the Business Architecture Core Metamodel (BACM), using ArchiMate notation. The session will demonstrate that with the appropriate organizational structure and naming convention, organizations can use ArchiMate to design and deploy a business architecture knowledgebase. This session will offer practical guidelines and suggestions for using an ArchiMate-based tool for setting up and managing a business architecture practice.

**Bio:** Tim Hale is an Enterprise Architect at Arvest Bank Group, joining more than 6 years ago. Tim has led the recently formed business architecture practice since its inception more than 2 years ago. Prior to Arvest, he spent 30 years in Walmart IT, 20 of that working on the architecture team.

4:00–5:00 pm | Tool 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*

*Co-Chair: Whynde Kuehn*

*Co-Chair: Mike Rosen*

**Abstract:** The Guild Co-Chairs will open the floor to discuss feedback and questions from Innovation Summit Day 2 and previewing Day 3.

## Business Architecture Innovation Summit – Day Three (Thursday, March 20, 2025)

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

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

*Co-Chair: William Ulrich*

*Co-Chair: Whynde Kuehn*

*Co-Chair: Mike Rosen*

**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 | Validating and Expanding Capabilities

*Breanne Casteel, Senior Enterprise Architect, Principal Financial Group*

**Abstract:** Capabilities are the cornerstone of your business architecture, so it is very important to ensure they are accurate for your business. Whether launching your business architecture or maturing your practice, there are steps you can take to validate and expand your capabilities in an efficient and scaled way. In this session, you will learn techniques used when building a capability map from the ground up as well as techniques used for maturing the practice. The bonus topic derived from these validation techniques is increasing practice awareness with your business stakeholders.

**Bio:** Breanne Casteel is a Business Architect for Principal Financial Group. 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, AAC and Certified Business Architect (CBA)<sup>®</sup> from the Guild.

### 10:00–10:20 am | Break

### 10:20–11:05 am | Leverage Business Architecture to Transform Trade Business Using AI

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

**Abstract:** Artificial intelligence, machine learning, large language models, and deep learning technologies are changing the landscape for economies, countries, and enterprises. They are disrupting traditional business models and pave the way for new innovative business models. Trade business is one domain that can benefit a lot from applying these technologies. This session will introduce a business architecture approach to transform the trade business by envisioning and deploying effective use cases and capabilities.

**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<sup>®</sup> (CBA<sup>®</sup>). 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 | Lightning Talks–Rapid Fire Practice Updates from the Field

*Panel Chair: Mike Rosen, Chief Scientist, Wilton Consulting, Business Architecture Guild Cofounder*

**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 lightening talks. The knowledge shared is matched by the entertainment value of the sessions.

## Noon–1:00 pm | Lunch

## 1:00–1:45 pm | Navigating Uncertainty: Business Architecture as a Catalyst for Successful Transformations

*Davoud Rezaei, Senior Business Analyst, Actone*

*Elnaz Amani, Senior Business Architect, University of Cambridge*

**Abstract:** Business transformation projects in large organizations are often filled with uncertainties, complicating planning and execution. Organizations may recognize their issues and have a general idea of necessary changes, but the desired end state is rarely clear at the start. Achieving a clear vision is a part of the transformation process. Organizations often adopt agile methodologies to deploy their objectives, but the approach carries risks and challenges. Organizations cannot treat large-scale transformations like agile software development, relying solely on a broad initial concept. These risks underscore the importance of having a cohesive methodology grounded in business architecture principles. Our practice at a large bank with over 250 branches and 18,000 employees initiated a social banking transformation as part of a strategy to enhance resilience against financial crises. Many aspects were initially ambiguous. Working with a team of architects and business analysts, we planned and executed the project based on business architecture principles, ultimately designing an ideal model for social banking and developing an implementation roadmap. This session will share lessons learned from this experience and offer valuable insights for organizations seeking to implement major transformative initiatives in complex organizations.

**Bio:** Davoud Rezaei is a seasoned Business Architect and Senior Business Analyst with a focus on business transformation, strategic development, and process improvement at large organizations. He has successfully led major transformation efforts, cross-functional teams, and the ideation and implementation of diverse products. An expert in service design and program management, Davoud excels in orchestrating transformation projects with a focus on agile, sustainable change. As a Ph.D. candidate in Industrial Engineering and Systems Management with a history of industry-academic collaboration, Davoud brings both depth and practicality to his work in business architecture, ensuring lasting value in all his projects.

**Bio:** Elnaz Aman currently works as a Senior Business Architect at Cambridge University. Previously, she served as a Business Architecture Team Lead and Consultant in the financial industry for seven years. Additionally, Elnaz volunteers for the Business Architecture Guild as a member of the metamodel team, the financial industry reference model team, and, more recently, the higher education reference model team. She has a Masters in Industrial Engineering and currently a Ph.D. candidate in the same field.

1:55–2:40 pm

## Building Tomorrow's Business Architects: Practice-Oriented Research in Information Systems Studies

*Jürgen Jung, Professor of Information Systems, Frankfurt University of Applied Sciences*  
*Pierre Wienke, FINIUS GmbH, Principal Consultant*

**Abstract:** In the field of business architecture, establishing a foothold as a young professional remains challenging. Business architecture is often viewed as a career progression role, pursued by experienced professionals rather than a career objective for new graduates. Traditional academic programs, while providing a solid theoretical foundation, frequently fall short in preparing students for the practical demands of industry. Essential skills such as self-directed problem-solving, identifying and addressing real-world issues, and gaining insights through the resolution process are rarely emphasized. To address these challenges, the presenters have introduced a practice-oriented initiative at the University of Applied Sciences that provides students with hands-on experience in managing complex, real world scenarios. The approach not only enhances students' practical skills, but introduces business architecture as a viable, rewarding career path. This session will detail one such project, exploring the challenges encountered, solutions developed, and outcomes achieved, bridging the gap between theoretical study and industry readiness for a new generation of business architects.

**Bio:** Jürgen is a professor of Information Systems at the Frankfurt University of Applied Sciences, specializing in enterprise architecture. With over a decade of experience at Deutsche Post DHL, he brings a wealth of industry knowledge to his academic role. His work blends practical expertise with research in digital transformation, enterprise architecture, and IT systems. At Deutsche Post DHL, he contributed to initiatives that leveraged enterprise architecture to improve processes and support strategic decision-making, giving him a nuanced understanding of both organizational and technological complexities. Now, he focuses on preparing future professionals in information systems, integrating real-world applications into his teaching and research to develop skills in enterprise architecture and innovation.

**Bio:** Pierre is a Certified Business Architect (CBA)<sup>®</sup> and Principal Consultant at FINIUS GmbH in Germany, where he leads the Subject Area "Methods and Standards in Business Analysis and Business Architecture Management." With nearly 20 years of experience in roles such as Business Architect, IT-Business Analyst, Requirements Engineer, Trainer, and occasionally acting as a Project Lead, Pierre has been actively engaged in driving business change throughout his career. His expertise lies in model-based, standardized approaches to Business Analysis and Business Architecture. Recently, he was appointed chair of the Guild's Metamodel Team. Additionally, Pierre collaborates with Frankfurt University of Applied Sciences, contributing to the integration of academic research and practical application for the last three years.

2:40–3:00 pm | Break

3:00–3:45 pm

## Enabling Cyber Security Using BIZBOK<sup>®</sup> Guide and the Sherwood Applied Business Security Architecture Framework (SABSA)

*Don Kava, Business Architecture Enabled Business Cyber Security Analyst, GG*

**Abstract:** This paper describes the process and outcomes of using business architecture with the BIZBOK<sup>®</sup> Guide to effectively define requirements for a UK Central Government program to drive a business-led, cyber security transformation project. The approach developed a business capability

model and agile epics to identify cyber security risks associated with cloud-based, UK Government driven business objectives targeting a major Business Trading System with cyber security controls. Utilizing the Sherwood Applied Business Security Architecture (SABSA) framework, a proven methodology for developing business-driven, risk and opportunity focused security architectures across the enterprise. With a global objective to utilize public, third-party cloud providers to deliver business services, it was essential to capture, model and define business outcomes with optimized cyber security controls to mitigate business risks. This session will examine a pragmatic business framework for delivering an effectively deployed, complex trading system under tight timeframes with business oversight.

**Bio:** Don Kava is a hands-on Enterprise Business Architect, Senior Business Analyst, Agile Technical Project Manager and Business Design Authority across multiple business verticals. Don is adept at balancing the fundamental shift to digital by default with the challenges of cyber security and omni channel access to support organizational transformations while respecting corporate values and cultures. He is an expert in the Sherwood Applied Business Security Architecture (SABSA) Framework, scaled agile and DevSecOps Framework, utilizing elements from Secure by Design (UK Government) to mitigate cyber security business risks. Don has delivered multiple cloud-based business projects and enabled extensive business capability change at the UK central government. His current focus is developing risk assessments and trust views for artificial intelligence platforms, utilizing the BIZBOK® Guide and SABSA.

3:55–4:40 pm

## A Framework for Startups Continues using a Business Architecture Reference Model Part 2

*Lene Osterberg, COO and Founder, Linconomy*

*Diane LeBeau, Chair for the Guild's Council of Executive Advisors*

**Abstract:** Once a startup has structure and an ability to work efficiently with the right capabilities, how can they scale successfully? It continues to be critical to demonstrate to investors that the business model supports growth and is sustainable. Business architecture continues to offer the right framework for scaling and identifying the right value streams and capabilities. This presentation is truly a continuation of my presentation last year for startups. A startup framework, utilizing reference models, value streams, journeys and capabilities, ensures time to market, products and services are not impacted as the startup scales. It is critical a startup can scale efficiently and adapt to ever-changing markets quickly.

**Bio:** Lene Osterberg is COO and Founder at Linconomy, a wealth management digital platform. She is a board member at COOP Bank, a small Danish retail bank. Lene has previously worked COO 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. She is an active member of the Guild's Council of Executive Advisors.

**Bio:** Diane is the Chair of the GCEA and a member of the Business Architecture Board of Directors. She is the retired director of Business Architecture for United Airlines where she led a team of architects responsible for capturing and managing a common view of the airline's business capabilities for use in strategic planning and program and project support. In addition to business architecture, she has expertise in process optimization, business engagement and business transformation. Diane also has experience with IT PMO and airport operations. She is skilled in managing large programs and aligning business plans with IT solutions. She is recognized for her dynamic abilities in facilitating and managing change associated with major program initiatives.

## 4:45–5:15 pm | Closing Remarks

*Co-Chair: William Ulrich*

*Co-Chair: Whynde Kuehn*

*Co-Chair: Mike Rosen*

**Abstract:** 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 want to Summit to pursue long-term.