Business Architecture Innovation Summit – Day 1 (Tuesday, March 16, 2027)

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

8:40–9:10 am | Business Architecture 2027: Welcome Address

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

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

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

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

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

Bio: Whynde Kuehn is the Managing Director at S2E Transformation Inc. and a long-time practitioner, educator and thought leader. She is also a Co-Founder, 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)® 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®. As Guild cofounder, Mike was a major contributor to the business architecture foundational concepts articulated in the BIZBOK® Guide. In addition to his long consulting career and Guild contributions, Mike is a published author, had a career in software engineering, and has contributed to a number of industry standards. Mike is a Certified Business Architect® (CBA®).

9:15–10:00 am | Leveraging Business Architecture to Support the Strategic Objectives of State Government

Todd Hamrick, Enterprise Architect, State of North Carolina
Caitlin Mullen, Strategy and Governance, Business Architect, State of North Carolina

Abstract: In this session the presenters will share an approach for helping agency leadership achieve their strategic goals leveraging business architecture. This session will share the methodology used to capture agency goals and objectives, map out current state business capabilities, develop the current/future state business and operating models, and develop a roadmap to achieve the future state. The approach was leveraged at the Department of Health and Human Services, Department of Transportation, Department of Environmental Quality, and Office of Statewide Budget Management. The result has been an overwhelming success, giving agency leadership clarity on how to achieve their goals.

Bio: Todd Hamrick is an Enterprise Architect for the State of North Carolina with more than 15 years of experience in business architecture and enterprise architecture. He has built and led business architecture and enterprise architecture practices for several large private companies. In his current role, he works with agency and IT leaders to help agencies meet their strategic objectives and better serve North Carolina residents.

Bio: Caitlin Mullen has over 15 years' experience with the State of North Carolina. In her most current role with the Strategy and Governance team, she helps agencies map their strategic objectives to executable plans. As Business Architect for the State of North Carolina, she owns and maintains the statewide capability map and works with agencies to build current and future state business models.

10:00–10:20 am	**Break**

10:20–11:05 am	**Launching a Business Architecture Practice: Key Learnings and Pitfalls to Avoid**

Dan Mayhew, Principal Business Architect, UK Government: Home Office
Alan Dunster, UK Government: Home Office

Abstract: Establishing a business architecture practice is rarely a straightforward journey, particularly within large public sector organizations operating in complex and rapidly changing strategic environments. This session shares a UK Government Department's experience building a business architecture capability from the ground up, navigating evolving priorities, organizational change, and shifting stakeholder expectations. Drawing on real-world lessons, this session explores the critical decisions that helped establish credibility, secure executive support, and demonstrate value, alongside the pitfalls that slowed progress or created unintended challenges. Attendees will gain practical insights into defining a compelling vision, developing sustainable operating models, embedding architecture within delivery and strategy functions, and maintaining momentum when organizational priorities change. Whether launching a new practice or maturing an existing one, this session offers candid reflections and actionable advice to help accelerate success and avoid common mistakes.

Bio: Dan Mayhew is a Principal Business Architect in the UK Home Office, where he leads the development and maturity of business architecture across the Migration and Borders portfolio. Since joining the profession in 2016, he has helped shape business architecture standards and practices across multiple government departments. Dan applies business architecture to connect strategy and policy intent with business and technology transformation, supporting complex change. He is passionate about developing the profession, embedding business architecture best practice into transformation initiatives, and growing the capability of business architects.

Bio: Alan Dunster is a Business Architect within UK Government Home Office, specializing in the development of corporate-wide strategic business architecture. Passionate about bridging strategy and execution, Alan champions disciplined business architecture practices across a wide and varied organization. With extensive experience applying business architecture in complex, fast-changing environments, Alan's approach helps maintain a coherent view of the strategy domain amid dynamic and turbulent conditions.

11:15 am–noon	From Learning to Practice: Aligning Business Architecture, Data, and Technology for Business Value

Breanne Casteel, Sr Enterprise Architect, Business Architect Advisor & Mentor, Principal Financial Group
Stephanie Ramsay, Technical Fellow, Enterprise Architecture & Strategy, RTX

Abstract: What happens after the workshop ends and practitioners return to the realities of their organizations? In this session, two business architects share how lessons from the Business Architecture Guild's *Business Architecture Master Series* on data management and business architecture reinforced, challenged, and advanced their approaches to cross-domain architecture alignment. The session connects the Master Series' hands-on use of information concepts, capabilities, value streams, information states, and data alignment with practical experiences applying these perspectives in organizational settings. The presenters will explore why business meaning should precede data and technology design, how cross-mapping creates traceability from information to value delivery, and why successful alignment depends on intentional collaboration rather than the exchange of disconnected artifacts. Through candid stories of what worked, what required adaptation, and what they would approach differently, attendees will gain practical ideas for applying methods within their own organization. Participants will leave with a flexible approach for selecting a bounded business scenario, connecting architecture perspectives, clarifying ownership, and turning professional development into measurable business value.

Bio: Breanne Casteel is a Senior Enterprise Architect, Certified Business Architect (CBA®), speaker, and mentor who helps organizations connect strategy to execution. With more than 20 years of experience spanning technology, business analysis, and business architecture, she is known for bringing structure to complexity and creating alignment where competing perspectives, priorities, and goals exist. With a practical, people-centered approach, Breanne works at the intersection of strategy execution, governance, architecture, and emerging technologies. She is passionate about bridging the gap between business and technology, fostering shared understanding, and transforming complexity into actionable outcomes. A frequent conference speaker, webinar presenter, podcast guest, and community leader, Breanne shares real-world lessons on strategy execution, organizational alignment, and the intersection of business architecture and business analysis.

Bio: Stephanie Ramsay is an RTX Technical Fellow specializing in Enterprise Architecture & Strategy and Digital Product Lifecycle Management. She has spent 25 years at RTX, 20 with the Raytheon business and the last 5 with Enterprise Services. Stephanie has deep expertise across digital technologies, spanning applications, infrastructure, and service delivery. She has strong competencies in strategy, enterprise architecture, portfolio management, business relationship management, and sourcing and supplier management. Stephanie holds a Bachelor of Science in Business from the University of Phoenix and a Master's degree in Supply Chain Management from Penn State. She is an RTX Certified Architect, an Open Group Master Certified Architect, and a Certified Business Architect®. At RTX, Stephanie serves on the Corporate Architecture Board and sponsors architects pursuing certification through the RTX Certified Architect Program (CAP). She leads the RTX business architecture practice. Externally, Stephanie is co-lead for the Business Architecture Guild's Manufacturing reference model team and a member of the Object Management Group's Architecture-Driven Modernization task force. She previously held leadership roles with The Open Group.

Noon–1:00 pm	Lunch

1:00–1:45 pm	From AI Ambition to Business Value: How Business Architecture Created a Living Digital Roadmap

Sandrine Schillinger, Manager Architecture, EQUINOR
Alexandra Cely, Manager External Analysis, EQUINOR

Abstract: Many organizations want to leverage AI and digital technologies but struggle to determine where they can create the most value. This session explores how business architecture was used within the market intelligence and strategic insights business area to support a newly appointed Digital Manager whose role, mandate, and priorities were evolving. Rather than defining the role in isolation, the team applied an architectural approach to clarify its purpose, shape how it could create value, and guide engagement with different parts of the organization, accelerating the manager's integration and the organization's digital transformation journey. As the Digital Manager engaged leaders and teams across the different departments, she gained insight into business needs, operational challenges, organizational interfaces, and digital ambitions, simultaneously refining her role and establishing credibility. Business architecture provided the structure to connect these perspectives, identify common themes, reveal interdependencies, and determine where AI and digital technologies could most effectively support insight generation, knowledge sharing, and decision-making. These insights were translated into a prioritized digital roadmap aligned with business objectives. The roadmap became a living management tool with an interactive platform, performance indicators, and governance process that enabled stakeholders to monitor progress, reassess priorities, and continuously align investments with evolving business needs. Beyond the roadmap itself, the presentation will illustrate how business architecture helped create shared understanding across stakeholders, make dependencies visible, and establish the governance and management practices needed to continuously align AI investments with business priorities.

Bio: Sandrine Schillinger is a Business Architect and transformation leader at Equinor with more than 25 years of international experience across business, leadership, and change roles. With a background in geology, she discovered business architecture eight years ago when a colleague pointed out that many of the ways she approached transformation and organizational challenges were already examples of architectural thinking. What began as curiosity about a new discipline soon became a passion, as she realized it provided a language and structure for much of the work she had been doing throughout her career. Sandrine has honed her architecture skills through hands-on experience and professional certification, applying those skills to a wide range of business challenges. Bringing together her business, transformation, and architecture experience, she helps leaders navigate complexity, understand dependencies, and create coherence across strategies, decisions, and initiatives. Sandrine is passionate about helping organizations align around a common direction and focus their efforts where it creates the greatest value.

Bio: Alexandra Cely is a Digital and Advanced Analytics Lead in Global External Analysis at Equinor. She has a Master of Science in Offshore Engineering and a Masters in Artificial Intelligence for Business**.** She brings people, analytics, and technology together to help make better business decisions. Working across the energy value chain has helped Alexandra see how technical, operational and strategic priorities fit together and where digital tools and AI can help. For Alexandra, finding useful solutions starts with understanding what people need and working together to make everyday challenges more manageable.

1:55–2:40 pm	From Application Portfolio to Capability-Led Transformation: Scaling Business Architecture with AI

Davoud Rezaei, Business Architect, University of Southampton

Abstract: Establishing and delivering business architecture in large organizations can be resource-intensive and time-consuming. Bottom-up approaches often involve extensive information gathering, operational discovery, stakeholder engagement, and complex analysis across business and technology domains. While valuable, these activities can make it difficult to maintain momentum, particularly when working with limited resources and fragmented organizational knowledge. This session presents a practical case study from a UK higher education institution, exploring how an application-led, capability-based approach, augmented by AI, was used to establish and progressively develop business architecture across its Student Systems portfolio. Rather than starting with a comprehensive enterprise architecture model or waiting for the selection of a dedicated architecture tool, the work began with Application Portfolio Management as a tangible and manageable entry point. AI tools were incorporated to facilitate a human-AI collaboration that addressed traditional challenges of bottom-up architecture delivery while maintaining the importance of architectural judgement, validation and rigor. The result was a practical, repeatable working model, supported by a proportionate, Excel-based environment. The team was able to establish a clearer understanding of its operational needs and the capabilities required from future architecture tooling, providing a foundation for extending the approach beyond Student Systems to the wider university. The session wraps up by demonstrating how combining application portfolio management, capability-based architecture, and AI can make business architecture delivery more achievable, scalable and actionable.

Bio: Davoud Rezaei is a Business Architect at the University of Southampton, with 8 years prior professional experience as Business Architect in banking. His work focuses on applying capability-based business architecture to understand the relationship between organizational capabilities, operational activities and supporting technologies, and translating architectural insights into strategic priorities and transformation roadmaps. At the University of Southampton, he has been developing an application-led approach to business architecture, combining Application Portfolio Management, operational discovery and AI-enabled analysis to accelerate architecture delivery and support scalable transformation. He is also actively involved in the Business Architecture Guild's Higher Education Reference Model team. His professional interests include advancing practical approaches to business architecture, connecting business and technology perspectives, and exploring how emerging technologies can enhance the role and impact of business architecture in organizations.

2:40–3:05 pm	Break

3:05–3:50 pm	Anchoring Business Architecture in Operational Reality

Maarten Hartog, Lead Business Architect, University of New South Wales (UNSW)

Abstract: Business architecture creates value when it helps people make sense of the work in front of them—not only when it is presented as an enterprise-level model. Yet its abstractions can feel distant from the decisions and challenges of day-to-day operations. This session shares applied practice at a top 20 global university in Australia. It explores an approach to making business architecture relevant within individual operational contexts. By connecting the language and

structure of architecture to the way people describe their work and shape solutions, architecture can become part of everyday ways of working. Staff can use practical frameworks to orient themselves in the business context without needing to learn the discipline or even recognize that they are engaging with business architecture. This creates value in two directions. Operational teams gain a clearer view of how their work contributes business value, while the details and decisions emerging from that work provide evidence to test and refine architectural abstractions. Value streams offer the connective structure; they allow context-specific insight to be organized back into the broader architecture, informing the development of capabilities and relationships among architectural elements. Rather than beginning with extensive education and socialization, this approach seeks acceptance through usefulness. It offers a foundation for business architecture that is grounded in operational reality, continually informed by practice, and better positioned to support coherent change.

Bio: Maarten Hartog is Business Architecture Lead at the University of New South Wales (UNSW) in Sydney Australia, where he is establishing a greenfield enterprise business architecture function in a federated university. His work connects strategy to reality to support coherence, consistency and assurance across the organization. He is active in the Business Architecture Guild's Higher Education Industry Reference Model group and Insurance Reference Model group. Previously, at QBE Insurance, Maarten built a greenfield business architecture practice that connected strategic objectives to initiatives across a major modernization program. Playing roles in business architecture, operating model design, process architecture, and transformation, Maarten focuses on making architectural frameworks useful in practice. He also writes the Substack 'Connected Execution' which explores how to make business architecture useful in practice.

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

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

Abstract: The Business Architecture Guild® produces reference models for financial services, government, healthcare providers, higher education, insurance, manufacturing, retail, transportation, telecommunications. 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. He 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. Ivan is a Certified Business Architect (CBA)®.

5:00–5:15 pm | Day One Wrap-up

Co-Chairs' Wrap-up

Abstract: In this closing session, the Summit Co-Chairs will open the floor to discuss feedback and questions from day 1 of the Innovation Summit.

Business Architecture Innovation Summit – Day 2 (Wednesday, March 17, 2027)

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

8:45–9:05 am	Welcome Back Opening Session

Abstract: The Summit Co-Chairs will field questions and comments from day 1 and provide an overview of what to expect on day two, highlighting themes for the day.

Co-chairs' Welcome and Update

9:10–9:55 am	A Shared Language for Resilience: Bridging Business Architecture and Continuity Planning

Roberto Murillo, Sr. Business Architect, Globe Life

Abstract: When building a business continuity plan, the org chart is the most obvious place to look for who does what. It's also misleading; business architecture is naturally equipped to provide clarity. A Resilience department in a life insurance company will first ask: "which enterprise activities are highest priority for business continuity?" Without business architecture, the org chart becomes the default answer and, in practice, falls short. The most 'critical' departments perform some clearly non-critical activities, such as the customer service department running call activity reports. In addition, some critical activities are less critical to short-term continuity, such as scheduling a sales call versus scheduling a performance review with a vendor. Business architecture brings clarity by identifying resilience criticality at the intersection of capabilities and business units, answering the question of "how critical is each activity when performed by each department?" This granularity allows Resilience to accurately prioritize and scope continuity plans. The question shifts from "how do we keep our customer service department running no matter what?" to "how do we ensure we can communicate with existing policyholders in a crisis?" This approach streamlines continuity planning by reducing the number of critical plans required, making those plans more targeted and effective. It also expands business architecture's reach across the enterprise, as Resilience opens doors to stakeholders that business architecture teams may not have been able to access directly. Attendees will leave with a practical framework for positioning business architecture as a strategic partner in enterprise resilience planning.

Bio: Roberto Murillo is a Certified Business Architect (CBA)® and Strategy and IT professional with over 15 years of experience translating complex business needs into actionable strategies and solutions. Currently serving as a Sr. Business Architect under Enterprise Strategy at Globe Life in McKinney, TX, Roberto leads enterprise-wide capability mapping, value stream documentation, and business architecture practice maturity delivering strategic insights to C-Suite and Board-level stakeholders.

9:55–10:15 am	Break

10:15–11:10 am	Practical Business Architecture Modeling with ArchiMate®

Adam Bajer, Lead Business Architect, Frontex
Elnaz Amani, University of Cambridge

Abstract: As the business architecture practice continues to expand, organizations are seeking ways to scale and integrate the discipline through the use of metamodel enabled tooling. At the same time, a number of organizations are using ArchiMate-based tooling to manage their enterprise architecture. While ArchiMate® is a widely used formalism for managing enterprise

metadata, it is not always apparent to practitioners how to best leverage it to enable and scale a BIZBOK® Guide-based, business architecture practice. To address this issue, the Guild metamodel team has published a Business Architecture / ArchiMate® Metamodel Alignment Guide, which provides a detailed perspective on how the Guild's metamodel aligns to corresponding ArchiMate representations. This session will deliver practical tips and insights into modeling business architecture using the ArchiMate® notation. The main focus will be on how to effectively structure and visualize core business architecture elements to support strategic decisions. As a result, participants will gain the clear view to harmonize these two industry standards within their organizations, leaving with a practical approach to building a unified architecture practice that effectively bridges the gap between business strategy and enterprise execution.

Bio: Adam Bajer is a Lead Business Architect with over 20 years of IT experience, having started as a software engineer before moving into systems analysis and enterprise and business architecture. He translates organizational strategy into user-centric business solutions at a major EU public administration agency, aligns business and enterprise architecture, and promotes enterprise design to improve efficiency and strategic alignment. Adam is a Certified Business Architect (CBA)®.

Bio: Elnaz Amani is a Senior Business Architect at the University of Cambridge, specializing in strategy execution, capability development and business–IT alignment. She contributes to Business Architecture Guild initiatives including the Metamodel and industry reference models, and focuses on value-driven architecture practices that bridge strategy and technology delivery.

11:15 am–noon | The Accelerants to Developing and Adopting Business Capabilities

Teresa Garcia-Holm, Principal Business Architect, First Citizens Bank

Abstract: Business capabilities are one of the core domains within business architecture. Along with information concepts, capabilities establish the building blocks to create the shared understanding for designing business blueprints. There are several key accelerants that can be applied to demonstrate the value of business capabilities. These include actively seeking and improving existing disorganized, inefficient, and siloed planning activities by connecting them to meaningful datapoints and business insights. Business capabilities can also be used as an organizing mechanism to drive enterprise transformation. With a focus on these two focal points, this session will demonstrate how business capabilities can be used to simplify the complex and connect the disconnect.

Bio: Teresa Garcia-Holm is a certified Principal Business Architect with over two decades in the financial services industry. She has led transformative change by helping organizations simplify the complex and connect the disconnected using business architecture. Teresa aligns disciplines across business and technology by driving collaboration around a shared understanding to optimize the customer experience and deliver against strategic objectives. Teresa has held diverse roles, from Account Manager at Coldwell Banker, to Business Process Consultant, Digital Business Architect, and Sr. Business Execution Manager at Wells Fargo, to her most recent position as the Principal Business Architect at First Citizens Bank. Teresa is passionate about serving her community. She is past Chair of the Central Iowa Diversity, Equity & Inclusion Committee at Wells Fargo, served two terms as a UNI Finance Advisory Council Member, and is a former Board Member for Lutheran Church of Hope Missions. She currently serves as President of the Agency Board of Directors for Children and Families of Iowa. Teresa is mentor for the Business Architecture Guild's Financial Services Reference Model Team and serves on the Guild's Editorial Board.

Noon–1:00 pm	Lunch

1:00–1:45 pm	AI and the Evolution of Business Architecture: Accelerating Impact, Scale, and Value

Kristen McCloskey Dexter, Enterprise Business Architect, FedEx

Abstract: Artificial intelligence has rapidly evolved from an emerging technology to a transformative capability embedded across nearly every aspect of business and daily life. Over the past year, advances in AI have created unprecedented opportunities for business architects to enhance their effectiveness, increase the scale of their practice, and deliver greater strategic value to their organizations. This session explores practical applications of AI within the business architecture discipline, highlighting real-world use cases, lessons learned, and measurable benefits achieved to date. Attendees will gain insight into how AI is augmenting key business architecture activities, improving decision-making, accelerating analysis, maintaining, governing and maturing the business architecture framework, and strengthening stakeholder engagement. This session will also examine emerging capabilities and discuss the future role of AI in enabling business architects to operate with greater speed, precision, and influence as organizations navigate increasingly complex business environments.

Bio: Kristen McCloskey Dexter is an Enterprise Business Architect at FedEx, where she helps drive transformation through the Strategy to Execution lifecycle. She co-leads the Business Architecture Community of Practice and collaborates across architecture teams to develop frameworks and standards that deliver strategic insights and support capability maturity. Kristen is passionate about building frameworks "just enough" to deliver value, and takes a pragmatic, intentional approach to evolving the practice. She is particularly inspired by the potential of AI to enhance business architecture and looks forward to its continued evolution. With 30 years of experience in the transportation industry — spanning network planning, operations engineering, technology implementation, training, and performance management — Kristen brings a rich, cross-functional perspective to her work and the broader business architecture community.

1:55–2:40 pm	Evolving Business Architecture Through a Unified Metrics Metamodel

Ravi Warrier, Business Process Engineer, Oracle
Michael DeCamp, Director, Program & Project Management, LTIMindtree

Abstract: This session distills the Business Architecture Guild's Business Architecture Metrics Whitepaper and the resulting updates to the discipline's knowledgebase. The whitepaper establishes a coherent taxonomy, shared definitions, and a practical framework for integrating metrics into business architecture—positioning measurement as a foundational mechanism for aligning strategy, capabilities, value streams, and outcomes. This presentation introduces the updated metrics metamodel, which formalizes how strategic and operational metrics, targets, values, and portfolios connect to core business architecture domains. Attendees will also gain insights into new BIZBOK® Guide updates that expand the treatment of business metrics, offering refined terminology and usage guidance for evidence-based analysis and strategy execution. Finally, this session provides a crisp, executive-level overview of the whitepaper, equipping practitioners with the ability to apply metrics more effectively across planning, decision-making, and performance management.

Bio: Dr. Ravi Warrier is a Business Process Engineer at Oracle. He has just under five decades of experience spanning the technology; consumer products; automotive; and engineering &

construction industries with a particular focus on organizational alignment, transformation, governance & compliance, and process maturity. While he has never held a formal title containing the words Business Architect, many of the challenges he has addressed in his professional journey sit squarely within the discipline. He likes to say that he has been practicing business architecture for decades, just traveling incognito! Ravi is a Certified Business Architect (CBA)® and holds a PhD in strategic alignment.

Bio: Michael DeCamp is a Senior Consultant at LTM with focus on business case development and digital transformation where he leverages his knowledge as a Certified Business Architect (CBA)® to start, grow and mature the practice of business architecture. His professional experience spans multiple industries like healthcare, supply chain and manufacturing, telecommunications, and human resources where he has held positions in product management, project and program management, business analysis, change management, and business architect.

2:40–3:05 pm	**Break**

3:05–3:50 pm	**The Architecture of Data Trust: Unlocking AI Adoption and Sustainable Business Growth**

Ayana Richards, Sr. Director of Strategic Data Management, Arvest Bank

Abstract: To enable an enterprise data platform and bridge strategic goals with quality execution, business architecture must serve as the primary structural driver and enabler of data architecture. This presentation explores how foundational components can be operationalized to strengthen organizational capabilities. Effective operationalization requires anchoring the architecture by mapping business capabilities as distinct entities within configuration management databases, linking downward to core applications and infrastructure. Critical data elements, ownership structures, validation rules, and business lineage must be cataloged in dedicated data repositories to maintain strict transparency. Bridging systems allows governance frameworks to immediately trace how operational anomalies impact overarching business priorities. Furthermore, data architects must define a clear architectural vision, establishing policies that enforce rigorous data governance. By establishing robust security measures, metadata frameworks, and performance monitoring, organizations create a scalable foundation for advanced analytics and artificial intelligence integration. Attendees will discover actionable methodologies to remove ambiguity, eliminate data silos, standardize naming conventions, and optimize enterprise-wide platforms for sustainable business value. The true tipping point arrives when business architecture moves beyond mere operational alignment to become the ultimate catalyst for enterprise acceleration, which occurs when every business capability and every process converges to anchor data trust, power seamless AI adoption, and fuel unconstrained business growth.

Bio: Ayana Richards is the Senior Director of Strategic Data Management at Arvest Bank, bringing over 18 years of transformational leadership experience in enterprise data governance, regulatory compliance, and modernization across global financial institutions. A recognized industry leader and recipient of the Top 50 Women Leaders in Banking award, she specializes in aligning data and business architectures to drive robust data quality, risk mitigation, and operational excellence. Ayana holds an MS in Management & Systems from New York University and a BS from the University of the West Indies. She is a Google Cloud Digital Leader, holds DCAM certification, and actively contributes to and attends several Data, AI and Cloud industry working groups.

4:00–5:00 pm | Vendor Panel

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

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

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

5:00–5:15 pm | Day Two Wrap-up

Co-Chairs' Wrap-up

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

Business Architecture Innovation Summit – Day 3 (Thursday, March 18, 2027)

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

8:40–9:10 am	Day Three Opening

Co-chairs' Welcome and Update

Abstract: In the day 3 opening session of the Summit, the Guild Co-Chairs will discuss Guild and industry related plans going forward, which include strategic relationships, future events, and AI related work. This is an interactive session that includes audience feedback and questions.

9:15–10:00 am	Operationalizing Business Architecture Through an Enterprise Investment Framework

Gary Wright, Manager, EPMO, Delta Dental

Abstract: How do we move business architecture from something an organization understands intellectually to something it consistently uses? Despite significant investments in defining capabilities and value streams, many organizations struggle to integrate business architecture into everyday business decisions. The challenge is not simply creating architecture artifacts, but establishing the organizational demand, executive sponsorship, and cross-functional partnerships necessary for meaningful adoption. The central proposition is straightforward. Rather than asking organizations to adopt business architecture as a separate discipline, make business architecture an essential part of how they invest, transform, and create value. This presentation explores how the creation and implementation of an Enterprise Investment Framework can help address this challenge, creating a business reason for enterprise architecture. The framework creates opportunities for executives, finance, business leaders, architects, and delivery teams to engage with business architecture through familiar investment management activities. The discussion will examine the framework's design, its integration with existing governance processes, and how investment-driven architecture development can establish a sustainable path toward broader enterprise adoption.

Bio: Gary Wright's background spans business development, strategic partnerships, and enterprise transformation across technology, biotech, and global enterprise organizations. Over the past two decades, he has worked with startups and Global 50 companies and built partnerships with organizations such as Samsung, Bristol Myers Squibb, Apple, and GE. His focus is on aligning strategy with execution through work such as negotiating global enterprise agreements, collaborating with cross-functional teams, and driving year-over-year growth. Working in 14 countries has shaped how he approaches culture and collaboration and broadened his perspective. Gary has held executive and senior management roles and has supported C-suite strategies and enterprise-wide initiatives as a Certified Business Architect. He enjoys translating complex strategy into practical, measurable outcomes and helping teams put ideas into action. He believes that strategy delivers value when it is clearly defined and backed by strong program leadership, thoughtful business analysis, and disciplined execution.

10:00–10:20 am	Break

10:20–11:05 am	It Takes a Village: Bringing Business Capabilities to Life in a Global Retail Enterprise

Ramona Ungureanu, Capability Development Leader, IKEA
Henk Joubert, Enterprise Architect, IKEA

Abstract: Successful business architecture is not built by one discipline alone. It takes a village, a shared language, and a lifecycle that brings it all together. In a large, complex retail organization, identifying, developing and implementing business capabilities is not the responsibility of a single team. It takes a village. Business leaders, technology architects, enterprise architects, process specialists, organizational design experts, and data architects all rely on business capabilities, but each uses them through a different lens and for a different purpose. The challenge is to create a common understanding while enabling these diverse stakeholders to apply capabilities in ways that support their specific needs. This presentation shares practical insights into how a Business Architecture Centre of Excellence can bring structure and consistency to the capability lifecycle—from identification and development to implementation and continuous evolution. The overall focus is on how to turn business capabilities from a conceptual model into a practical tool that drives enterprise-wide transformation? Using the Business Architecture Guild's reference model as a foundation, the session explores how a common framework can connect different disciplines, align perspectives and support the practical use of capabilities across the enterprise. Participants will gain insights into establishing a shared capability language, connecting business and technology perspectives, and creating the governance and collaboration needed to make business capabilities actionable at scale.

Bio: Ramona Luisa Ungureanu is a business architecture professional at IKEA Retail with experience in international business environments. She is passionate about connecting business strategy, technology and organizational design through business capabilities. As co-founder of Women In Tech Alliance, she also advocates for collaboration, learning and greater inclusion in the technology industry.

Bio: Henk Joubert is an Enterprise Architect at IKEA. With extensive business and technology experience, Henk helps clients realize complex technology opportunities and, more importantly, helps identify the strategic opportunities and threats. Over his career, he has worked as an enterprise architect, strategic planner, transformation analyst, and a number of other roles. Prior to IKEA, Henk worked at Digital Innovation, Harley-Davidson, and other companies.

11:15 am–noon	Lightning Talks

Session Chair: Mike Rosen, Chief Scientist, Wilton Consulting

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

Noon–1:00 pm	Lunch

1:00–1:45 pm	The Secret Is in the Roux: Building a Shared Foundation for Business and Technical Architecture

Yolanda Griffin, Lead Enterprise Architect, Louisiana Blue
Amanda Streeter, Senior Enterprise Architect, Louisiana Blue

Abstract: In Louisiana, we know a great gumbo doesn't start with seafood, sausage, or the secret spice blend. It starts with the roux, the foundation that brings those ingredients together. In architecture, the business blueprint serves that same role, connecting business intent and strategy with technical solution design. Business architects create a business blueprint that helps technical architects design and build solutions. This session explores how Louisiana Blue is developing that relationship through ongoing collaboration, rather than a disconnected handoff. Business capabilities establish a shared foundation, value streams illustrate how value moves through the organization, and a common enterprise platform brings business strategy and technical execution into a unified enterprise view. The blueprint grounds solution decisions in business capabilities, value streams, and intended outcomes. Technical architects bring platform and implementation realities into the conversation, helping both disciplines refine their understanding while maintaining their distinct responsibilities and perspectives. Attendees will learn how capabilities and value streams can make the business blueprint useful to technical architects, how a shared platform can support a common enterprise view, and how continued collaboration can connect the blueprint to solution development without forcing both disciplines into a single model. Louisiana Blue's experience offers a practical discussion of incrementally maturing the practice rather than presenting a finished architecture journey. After all, gumbo is only as good as its roux, and an enterprise architecture is only as strong as the blueprint that brings its many ingredients together.

Bio: Yolanda Griffin, CBA®, is a Lead Enterprise Architect at Louisiana Blue with more than 15 years of experience spanning business architecture, enterprise architecture, data governance, and technology strategy. She partners with executive and technology leaders to align business strategy, capabilities, and technology investments, enabling enterprise transformation and informed decision-making. In her current role, Yolanda develops business architecture blueprints that connect strategy, processes, information, and technology, helping leaders make informed investment, modernization, and transformation decisions. She collaborates across business and technology teams to create a holistic view of organizational capabilities and drive alignment between business objectives and technology strategy. Yolanda holds an MBA from Louisiana State University Shreveport and a Master of Science in Computer Science from Clark Atlanta University. She holds professional certifications that include TOGAF, PMP®, Six Sigma Black Belt, SAFe, and ArchiMate. Yolanda is passionate about connecting business and technology, building the foundations that help organizations bring strategy, people, processes, and technology together.

Bio: Amanda Streeter is a Senior Enterprise Architect at Louisiana Blue, where she helps bridge business strategy and technology execution through business architecture, enterprise architecture, and operating model design. She partners with business and technology leaders to align strategic objectives, capabilities, value streams, and transformational initiatives across the enterprise. Amanda has broad experience in business architecture, business process management, service management, organizational transformation, and enterprise modernization. She leads efforts to develop business blueprints and future-state architectures that enable informed decision-making and strengthen alignment between business and technical teams. Her work focuses on translating business strategies into actionable architecture deliverables that support planning, investment decisions, and enterprise transformation. Amanda is passionate

about helping organizations translate strategy into measurable business outcomes and strengthening collaboration between business and technology stakeholders.

1:55–2:40 pm	The Behavior Behind the Illustration: How Business Architecture Uncovered the Hidden Experience Behind a Critical Trust Moment

Bethany Brach, Business Architect, MassMutual Life Insurance
Paige Hill, Head of Business Architecture, MassMutual Life Insurance

Abstract: At first glance, an in-force life insurance illustration appears to be a straightforward service request but behind every illustration request is a trust-testing moment where advisors help clients navigate important life, financial, and protection decisions that can significantly impact long-term outcomes. Through an innovative partnership with Advisor/Client Experience, MassMutual's Business Architecture team sparked a bold, end-to-end reimagination of the in-force illustration experience. By combining business architecture practices with journey mapping, Voice of the Customer insights, field feedback loops, and experience design, we moved beyond workflow optimization to uncover previously unseen request behaviors, unmet needs, and capability gaps that traditional process analysis alone would not have revealed. By first defining the anatomy of the moment, understanding its value stream, and then mapping the end-to-end experience across advisors, clients, and operations, this session will show how the team fundamentally changed its understanding of where transformation was required. This work exposed infrastructure limitations, revealed new capability requirements, and challenged assumptions about the original experience requiring improvement. Participants will leave with practical, experience-first approaches to uncover hidden opportunities, connect strategy to execution, and use business architecture to strengthen moments that matter most to customers.

Bio: Bethany Brach is a Business Architect at MassMutual with more than 19 years of experience spanning operations, technology, data & analytics, and program management. Drawing on a career that began on the front lines serving customers and advisors, she brings a unique ability to connect business strategy, technology, and human experience. Bethany is passionate about uncovering the hidden moments that shape how people experience an organization and helping leaders design solutions that build trust and drive meaningful outcomes. She holds a bachelor's degree in Marketing & Branding from Bay Path University and enjoys traveling with her two daughters from frequent trips to Disney World to exploring the magic and charm of the New England states.

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

2:40–3:00 pm	Break

3:00–3:45 pm	From Capability Mapping to Portfolio Rationalization: A Pragmatic Path to Operationalizing Business Architecture

Honglei Zhou, Director, SMBC

Abstract: Business architecture initiatives can struggle to gain traction when they begin with ambitious modeling efforts that are disconnected from immediate business and technology decisions. A more pragmatic approach is to start with a concrete problem where Business Architecture can demonstrate value quickly. This session explores an approach that begins by mapping the application portfolio to business capabilities, creating a practical connection between what the business does and the technology that supports it. This initial mapping provides business architects with a foundation for understanding where applications overlap, where capabilities may be underserved, and where technology complexity may warrant further investigation. From there, Business Architects can progressively apply capability context to portfolio rationalization, partnering with Enterprise and Solution Architects to identify opportunities for consolidation, modernization, reuse, and investment prioritization. The same foundation helps teams evaluate new technology requests in the context of existing capabilities and application portfolios. This session additionally demonstrates how this incremental approach can help business architects establish credibility, strengthen collaboration across architecture disciplines, and connect business architecture artifacts to real decisions. Attendees will walk away with a practical path for evolving their business architecture practice from creating models about the enterprise to using those models to change the enterprise.

Bio: Honglei Zhou is Director, Business Architect for SMBC Americas' Division. An accomplished Business Architect and Transformation Strategist, she specializes in translating enterprise strategy into future-state capabilities and technology solutions, with expertise in developing multi-year transformation roadmaps that enhance business capabilities while integrating market innovations and navigating competitive dynamics. With over 25 years of management and consulting experience in the financial services industry, Ms. Zhou has a proven track record of conducting capability assessments, identifying optimization opportunities, business scenario planning for mergers and acquisitions, and delivering measurable business value. Her areas of expertise include capability mapping, strategy blueprints, target operating model design, digital transformation roadmap formation and portfolio rationalization. Ms. Zhou holds an MBA from New York University and a bachelor's degree from Beijing Foreign Studies University. She is a certified business architect (CBA®) with the Business Architecture Guild. She co-led the translation of the Business Architecture Quick Guide into Chinese.

3:55–4:40 pm	From Workflows to Agents: A Business Architecture Blueprint for Agentic AI

Jay Thakur, Sr. Executive Enterprise Architecture, U.S. Bank
Morad Mziout, Principal Consultant & Strategic Advisor - Business & Enterprise Architecture and AI Strategy, New Horizons Services Inc.

Abstract: As organizations increasingly introduce autonomous AI agents into business operations to execute tasks, make decisions, and collaborate across systems, they face challenges extending well beyond technology. The shift from predominantly human-centered workflows toward human-AI collaboration raises fundamental questions about how responsibilities are assigned, decisions are governed, and accountability is maintained. Traditional operating models must evolve to accommodate agents operating with varying degrees of autonomy while ensuring their actions remain aligned with business objectives, organizational policies, and risk tolerance.

This session explores how Business Architecture provides a structured foundation for designing agent-enabled operating models, assigning responsibilities and decision rights, and governing the integration of autonomous AI agents into business operations. The session uses a real-world use case to show how multiple AI agents can be mapped to capabilities and synchronized with an evolving business operating model. Participants will gain an understanding of how to model agent-enabled business capabilities, design agent interactions across value streams, establish governance and accountability, and translate agentic AI into business outcomes.

Bio: Jay Thakur, Sr. Executive Enterprise Architecture at U.S. Bank, is a transformational technology and AI leader with 20+ years of experience turning emerging technologies into measurable business outcomes. Armed with advanced credentials in data science and artificial intelligence and holding industry credentials in TOGAF, AIGP and Cloud, Jay brings a rare blend of technical fluency and enterprise transformation depth with a proven track record of leading enterprise architecture. Most recently, he has applied this expertise in the wealth management space. Currently, Jay is focused on defining enterprise AI strategies, building scalable AI and cloud capabilities, and leading technology transformation initiatives that accelerate innovation and business performance, all anchored in aligning technology investments with strategic business objectives. He is an active voice in the industry, speaking, writing, and contributing practical insights on integrating technologies into the enterprise architecture to align with business goals and the future of enterprise technology.

Bio: Morad Mziout is a distinguished strategic advisor, mentor, and leader in Business & Enterprise Architecture and Business Analysis. At New Horizons Services, his work includes advising, mentoring, and teaching business and enterprise architecture. Throughout his 19-year career, he has supported organizations across the public sector, financial services, insurance, healthcare, transportation, and infrastructure industries in translating strategic vision into tangible business outcomes. He excels in defining future-state business architectures and operating models, strengthening architecture and business analysis practices, and guiding large-scale business and technology transformation initiatives. Morad holds numerous globally recognized certifications, including TOGAF® Enterprise Architecture Practitioner and Leader, CBA®, ArchiMate® Practitioner, CBAP™, and BIAN®, that demonstrate mastery of leading industry frameworks and standards, Morad has actively contributed to the advancement of business and enterprise architecture practices by leading key initiatives within the Business Architecture Guild and authoring numerous white papers. As a recognized keynote speaker and instructor, he regularly shares practical insights and proven approaches through international conferences, masterclasses, webinars, and graduate-level educational programs.

4:45–5:15 pm | Key Takeaways from the Innovation Summit

Co-Chairs' Wrap-up

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