

Business Architecture Innovation Summit – Day One Tuesday, September 25, 2018

8:30 – 8:45 am

Introduction and Welcome

Dr. Richard Mark Soley, CEO, OMG

Chairman and Chief Executive Officer of OMG, Executive Director of the Cloud Standards Customer Council, and Executive Director of the Industrial Internet Consortium, Dr. Soley also serves on numerous industrial, technical and academic conference program committees, and speaks all over the world on issues relevant to standards, the adoption of new technology and creating successful companies.

8:45 – 9:15 am

Business Architecture 2018: Where We Are / Where We Are Headed

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

Co-Chair: Whynde Kuehn, Principal, S2E Consulting Inc., Business Architecture Associates, Director, Business Architecture Guild

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Abstract: This opening address will update attendees on the current state of business architecture and discuss where things are headed from here. This includes updates on reference model work, worldwide expansion of business architecture, regional updates, and evolution of the discipline.

Bio: William Ulrich is President of TSG, Inc., President and Cofounder of the Business Architecture Guild, Partner at Business Architecture Associates and Co-Chair of the OMG Architecture-Driven Modernization Task Force. A leading voice in business architecture and business transformation, Mr. Ulrich coalesces disparate forces to drive business architecture to the next level. He is also a Certified Business Architect® (CBA)®.

Bio: Whynde Kuehn is Principal at S2E Consulting Inc. and a long-time practitioner, educator and thought leader. Ms. Kuehn is Co-Founder, Board Member and Editorial Board Chair of the Business Architecture Guild, Partner at Business Architecture Associates and founder of Metanoia Global Inc., which helps social entrepreneurs start, scale and sustain successful businesses. She is also a Certified Business Architect® (CBA)®.

9:15 – 10:00 am

Using Business Capabilities to Make IT Metrics Meaningful Business

Diana Krohn, Head of Business Architecture, United Airlines [VIEW PDF](#)

Abstract: While business capabilities are being used to drive strategy and application design, few organizations are integrating capabilities all the way into their ITSM and reporting processes. By integrating capabilities into these areas, United has found greater alignment with service delivery and a better understanding of IT performance's impact on critical business capabilities. This session will outline the steps United has taken to reposition IT reliability metrics by capability and the impact it has had on issue resolution and how it can influence our conversations with business and IT.

Bio: Diana Krohn leads the business architecture team at United Airlines. Diana assisted in establishing the company's first business architecture team in 2008. She is responsible for capability analysis, process modeling, portfolio analysis, road mapping, business impact analysis, and business analyst competency development. Prior to her current assignment, Diana held positions in industrial engineering, business analysis, and process improvement, has a B.S. in Industrial Engineering from the Milwaukee School of Engineering and was a member of the Business Architecture Guild's Advisory Board.

10:00 – 10:30 am

Networking Break

10:30 – 11:15 am

Moving From Left to Right: Leveraging Business Architecture in Digital-Transformation from Strategic Planning to Solution Design

Terence Zhang, Senior Business Architect, BMO Financial [VIEW PDF](#)

Abstract: Enterprise Digitization Program is one of the largest and most complex initiatives in BMO's 200 years of history, with an ambitious goal of transforming core banking processes across the enterprise. Business architecture is playing a critical role for the program at the strategic planning phase as well as the solution design phase. During strategic planning, business architecture provides high-level design of target state capabilities and maturity roadmap with cross-mappings to strategic objectives, stakeholders, value streams, organizations and initiatives. During the solution design, high-level capabilities are decomposed and cross-mapped to products, processes, user types, channels and user experiences. Lower-level, cross-mapped capabilities provide a framework for articulating business requirements for micro-services design and drive reusability of capability implementations across multiple instances. The session will summarize how the business architecture practice has evolved while contributing tangible value to the program.

Bio: Terence Zhang is Lead Business Architect at BMO Financial for its multi-year digitization program, accountable for overall capability target state design and roadmap. He was the driving force in establishing the business architecture practice at BMO, and is now focused on applying the business architecture principles in collaboration with business stakeholders, enterprise architecture, and solution architecture to improve the reusability and scalability of the bank's digitization efforts. Terence is a Certified Business Architect® (CBA)®. In the last five years, he has successfully established a business architecture practice to drive the effectiveness of large transformation and optimization initiatives in companies across communications and financial services industries. Terence is playing an active role in building the Guild's Business Architecture Guild Community in the Toronto Area.

11:15 am – noon

Business Architecture Reference Models: What's New & How are They Being Used?

Panel Chair: Ivan Blinov, Chief Business Architect, BMASTER, INC., MBA, PMP, CBA®, CSPO [VIEW PDF](#)

Abstract: The Business Architecture Guild offers business architecture reference models across a number of industry sectors including manufacturing, financial services, healthcare, insurance, and transportation, along with a common reference model. A government reference model is also now underway. Reference models are crafted and matured by Guild members across industries, based on a formal mapping approach. This session overviews status of various reference models, shares deployment stories, and discusses near- and long-term usage options. The panel will include representatives from the Business Architecture Guild's reference model teams.

Bio: Ivan Blinov is Technical Director and Chief Business Architect at BMASTER INC. Ivan has over 15 years of success in leading business transformation projects. He has been a member of the Business Architecture Guild since 2014 and is a Certified Business Architect®. Ivan is mentor for the Guild's financial services reference model team and an active member of the common reference model, healthcare provider reference model, strategy, and metamodel teams.

Noon – 1:00 pm

Lunch

1:00 – 1:45 pm

Business and Enterprise Architecture: Best Friends Forever

Mike Rosen, Chief Scientist, Wilton Consulting Group, Director, Business Architecture Guild

Abstract: Many organizations struggle with reconciling business-focused, business architecture efforts with enterprise architecture work underway in their IT organization. This session provides attendees with the 'big picture' and how architectural efforts fit into an overall context. This session explores an integrated view of enterprise architecture domains that includes business, information, application, and technology, clarifying relationships among business, enterprise, and IT architectures. This session also discusses how architecture is essential and can be used to excel in the new digital economy, including performance, service, integration and security perspectives so critical to businesses today.

Bio: Mike Rosen is Chief Scientist of Wilton Consulting Group, which specializes in helping organizations create and get value from business and enterprise architectures as a key enabler of digital transformation. Mike has over 35 years of experience in architecture and application development, has held numerous CTO and Chief Architecture positions, and is internationally regarded for his presentations and courses in architecture. He is also Director, VP and Co-founder of the Business Architecture Guild. Mike is a Certified Business Architect (CBA)®.

1:45 – 2:30 pm

Partnership of Business Architecture and Digital Resiliency to Develop Business Continuity Management

Jolanta Sniadkowska, Senior Enterprise Architect, Export Development Canada [VIEW PDF](#)

Abstract: Business architecture, capability, value stream and information models provide the knowledge base instrumental to develop and maintain business continuity and disaster recovery plans. Understanding dependencies between business services and critical information is essential to the plan. But as important it is establishing the right level of governance of the business architecture and operating models to ensure the plans are current and relevant in the changing environment subject to pervasive business transformation. This presentation shares our experience in making this happen.

Bio: Jolanta Sniadkowska is a senior enterprise architect with over 30 years of experience focusing on Strategic Enterprise Planning, Business and Information Architecture, Analysis and Modeling. During her career developed a pragmatic approach to quickly generate, assess and adopt ideas and concepts that deliver value to the Organization by effectively establishing relationships, influence, negotiate, plan and execute on objectives. At EDC, she has advanced the business architecture discipline by establishing the enterprise capability and information models that are being leveraged by many partners, one of them being the digital resiliency and business continuity management.

2:30 – 3:00 pm

Networking Break

3:00 – 3:45 pm

Business Architecture Modeling for Everyone

Glenn Walker, Director, Planning & Enterprise Architecture, Alberta Investment Management Co (AIMCo)

Chris Armstrong, President, Sparx Services North America (SSNA)

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Abstract: One challenge organizations have had is to align industry tool support with standard approaches to business architecture. This session will review the UML® Profile for BIZBOK® created at the Business Architecture Guild to increase adoption of BIZBOK-based modeling for existing UML tool users. Not only does this solution diminish the need for end-users to create their own one-off customizations, but will also allow integration of business architecture models with other OMG-based model content including UML, SysML, BPMN, BMM, and UAF. The speakers will also review case studies that demonstrate real-world end-user application of the approach and related technology.

Bio: Glenn has been an architect working in the information technology world for over 30 years. Having worked in the consulting world for companies like CGI, EDS and IBM, Glenn now works for AIMCo, an investment management company located in Edmonton, Alberta. As part of his role as a solution architect and now Director of the Planning and Architecture, Glenn has been working on integrating the techniques from the BIZBOK® Guide into the existing eco-system of his company. One of the challenges was tooling to support the notation. Glenn turned to Sparx Enterprise Architect as a base for the solution and joined the Business Architecture Guild team working on a profile that could be used to support BIZBOK® artifacts alongside other notations supported by Enterprise Architect.

Bio: Chris is President of Sparx Services North America (SSNA), is an internationally recognized thought leader in enterprise architecture, formal modeling, process improvement, systems and software engineering, requirements management, and agile development. Mr. Armstrong represents SSNA at The Open Group, the Object Management Group, and the Business Architecture Guild. Mr. Armstrong is leading the UML Profile for BIZBOK® project, a co-chair of the TOGAF Certification Standing Committee (CSC) and EA Capability Improvement project, and is contributing to the next version of TOGAF, ArchiMate, and IT4IT. He is certified in TOGAF, ArchiMate, IT4IT, Open FAIR, UML, SysML, and is a Certified Business Architect® (CBA®).

3:45 – 4:30 pm

Transformation Using Business Architecture and Technology at TD Bank

Colin Leung, Enterprise Real Estate (ERE) Manager of Technology, TD Bank.

[VIEW PDF](#)

Abstract: Approximately two years ago, the Enterprise Real Estate (ERE) Business Unit at TD Bank started combining technology with business architecture. This presentation will share the goals, discoveries and achievements from that journey, with a focus on how the initiative has leveraged technology to deliver greater transformation capabilities using business architecture.

Bio: Mr. Leung serves as TD Bank's Enterprise Real Estate (ERE) Manager of Technology for the Business Management and Governance. He is responsible for the strategic planning, project oversight, and operational execution of various technology solutions in ERE. Colin is also currently active as the technology lead for ERE's North American Optimization initiative, normalizing ERE's Retail and Corporate Real Estate processes to a North American model and consolidating solutions to a single enterprise ecosystem. Prior to joining TD, Colin had over 17 years of experience working in IT as a software developer, technical product manager, consultant and trainer in IT automation, process efficiency, and workflow

4:30 – 5:15 pm

Business Architecture Survey – Guild Council of Executive Advisors

Moderator: Diane Le Beau, Director and GCEA Chair, Business Architecture Guild

Abstract: The Guild Council of Executive Advisors (GCEA) was formed in 2017 to advise the Business Architecture Guild's Board of Directors on approaches and strategies for communicating the value of business architecture to senior business executives. Over the past year, the GCEA has focused on executive communications, focused executive scenarios and understanding best practices as engaged in the field. This session will discuss the results of a survey the GCEA commissioned on best practices for communicating and leveraging business architecture.

Bio: Diane Le Beau is Director and GCEA Chair at the Business Architecture Guild and former Director of business architecture at United Airlines. Diane is an experienced leader with expertise in mergers and integration, process analysis, and strategic approaches to business improvement. At United, Diane managed a common view of the airline's capabilities and work across the business and engaged with senior management to meet strategic business demands. Diane is currently leading the Guild's efforts to engage with senior management to advance the value proposition of business architecture globally.

5:15 pm

Day 1 Wrap-up & Day 2 Preview

Co-Chairs: William Ulrich and Whynde Kuehn

Abstract: The day 1 wrap-up will review what was covered throughout the day's sessions and look ahead to day two of the Summit.

Business Architecture Innovation Summit – Day Two Wed. September 26, 2018

8:45 – 9:10 am

What Happens When the Summit Ends? Networking Opportunities, Getting Involved

Co-Chair: Whynde Kuehn, Principal, S2E Consulting, Director, Business Architecture Guild, Partner, BAA

Abstract: The Summit will end but the discussions and work will continue. This session will outline how you can extend your Summit experience beyond Reston, with a focus on joining the community of fellow business architects on collaborative teams and other endeavors.

9:10 – 10:00 am

Business Architecture – The Gateway to Transforming an Organization into an Agile Enterprise

William Ulrich, President, TSG, Inc., Partner, Business Architecture Associates

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Whynde Kuehn, Principal, S2E Consulting Inc., Business Architecture Associates

Abstract: Architecture and Agile: Can they really coexist? While seemingly contradictory opposites, this session will discuss how business architecture is, in fact, the gateway to establishing and sustaining enterprise agility. As organizations increase the pace of delivery across ever-changing business ecosystems, business architecture provides the stable foundation that enables businesses to expedite strategy formulation through strategy execution. In other words, business architecture helps ensure that organizations enacting change are doing the right things in the most effective ways possible. This session will walk attendees through the specifics of how business architecture is used to guide agile execution approaches and outline practical steps that organizations can take to integrate business architecture into the agile process, with a keen eye on critical conditions for success.

10:00 – 10:30 am

Networking Break

10:30 am – 11:15

Business-Driven, IT Architecture Transformation

Alla Adler, Senior Business Architect, Aviva

[VIEW PDF](#)

Abstract: This session will showcase business capabilities' relationship to the three leading business modeling standards produced by the Object Management Group (OMG) in recent years. Explained and demonstrated will be both general methods and best practices to linking business capabilities to an organization's operations captured using the Business Process Model and Notation (BPMN), the Case Management Model and Notation (CMMN) and the Decision Model Notation (DMN).

Bio: Alla Adler has over 18 years of experience in Government, Banking, Finance and Telecom industries, where throughout her professional career in business architecture, business analysis, business process re-engineering and system analysis Alla played a key role in a delivery of a large-scale projects for Service Delivery Management, Enterprise Risk Management, Enterprise Finance Management, Operational Risk Management, and Corporate Information Technology business areas. Alla holds a Master's Degree in Business Economics and is pursuing CFA designation. Alla is a Certified Business Architect® (CBA®).

11:15 – noon

A Journey to the Left: Moving from Execution to Strategy

Josephine Gilmore, Manager, Marketing Business, FedEx

[VIEW PDF](#)

Abstract: One of the key challenges for new business architecture practices is to quickly establish and demonstrate value-add by engaging in initiative assessment, as naysayers want to see results early in the lifecycle of practice. This is accomplished through engaging with in flight or planned initiatives and helping the corporation accomplish its strategic goals. However, the true value of business architecture is realized by engaging earlier in the process, where the practice can help an improved understanding of the initiative by project teams with a solid focus on the customer, as well as inform and drive strategy. FedEx has been on this journey for over a year and as the practice is being solidified, the business architecture team's focus is shifting earlier in the process to

the left, where the team is getting more involved with discovery and conceptualization, thereby eventually helping shape strategy.

Bio: Jo Gilmore is a Manager in the Product Development organization at FedEx Services. Her team supports the planning and execution through the implementation of Business Architecture practices, collaborating with other Business Architecture groups in a FedEx-wide Community of Practice. She has over 25 years of experience in product and portfolio development strategy in the technology, publishing and transportation industries. Jo sits on the Guild Council of Executive Advisors, which provides valuable executive business insights into the value and application to business.

Noon – 1:00 pm | Lunch

1:00 – 1:45 pm

Leveraging Business Architecture from Strategy Definition through Solution Deployment

Giovanni Traverso, Chief Enterprise Architect, Huawei Technologies [VIEW PDF](#)

Abstract: In this paper we will share experiences from a comprehensive transformation at a major Telco, enabled by Service Operation Center deployment along with a Smart-Care solution. Rather than implementing it in isolation, the solution represents a cornerstone enabler of a comprehensive Telco vision, to become a digital life service provider. Business Architecture-led approach was pursued, in order to ensure strategy alignment and integrate the new capabilities into operations throughout the whole organization. We used BA to coordinate and integrate several techniques such as Maturity Level Assessment, Design Thinking, Customer Journey mapping, Value Mapping through Multiple Parallel Value Streams, System Dynamics value modeling, Process and Metrics design, Organization Design and Competency Mapping.

BIO: Giovanni Traverso led various business transformations throughout his career as line of business manager as well as consultant/architect. Giovanni founded the business architecture practice in Huawei, where it had been adopted as an internal means to drive transformations and now is being used to help Telco customers drive their own digital transformation. He is a Certified Business Architect® (CBA)® and SABSA Foundation certified.

1:45 – 2:30 pm

Advancement of Business Architecture in the TOGAF Ecosystem

Steve DuPont, Associate Technical Fellow and Enterprise Architect, The Boeing Company [VIEW PDF](#)

Abstract: Led by a team of Certified Business Architects® from the Business Architecture Guild, the Business Architecture Workstream, within the Open Group Architecture Forum, has updated the TOGAF Ecosystem to apply key principles and methods. TOGAF Version 9.2, made available in April 2018, includes critical artifacts and methods for the modern business architecture practice, supported by a series of guides that delve deeper into methods and artifacts. This session will summarize these updates and the successes to date at integrating the discipline into the enterprise architecture domain.

Bio: Steve DuPont is an Associate Technical Fellow and Enterprise Architect with The Boeing Company. Steve's mission is to advance the state of the business architecture practice at Boeing and contribute to the body of knowledge and industry standards in the business architecture discipline. Steve first contributed to The Open Group standards in 2009 and is currently working to improve the alignment of TOGAF with modern business architecture practices and standards. Steve is a Certified Business Architect (CBA)®.

2:30 – 3:15 pm

Leveraging Business Architecture from Strategy Definition through Solution Deployment

Pierre Hadaya, Professor, School of Management of the Université du Québec à Montréal [VIEW PDF](#)
Bernard Gagnon, President and Co-Founder, ASATE Group Inc.

Abstract: Although numerous best practices have been adopted by organizations over the years to help them succeed in their strategic endeavors, they still face serious difficulties. That is why we have spent 5 years devising an innovative approach to help organizations surmount these persistent difficulties and achieve superior results. At the heart of this approach is a strategy management framework that leverages business architecture and other best practices. This

system enables organizations to strike the balance between urgency and diligence that is essential to the successful formulation, implementation and execution of a winning strategy. The objective of this talk is to present this business-architecture-enabled strategy management framework.

Bio: Pierre Hadaya is a professor at the School of Management of Université du Québec à Montréal. He holds a Ph.D. in Management of Technology from the École Polytechnique de Montréal. His main research interests focus on the formulation, implementation and execution of the strategy including organizational transformation governance, business architecture as well as the strategic alignment of IT systems within organizations (including IT Enterprise Architecture). As Co-Founder of ASATE Group Inc., Dr. Hadaya also collaborates with organizations striving to transform themselves so they can develop a competitive advantage.

Bio: Bernard Gagnon is president and Co-Founder of ASATE Group Inc., a management consulting firm that helps organizations better formulate, implement and execute their strategies. He has more than 30 years of experience working with organizations in the aerospace, banking, biotech, investment, manufacturing, retail, telecommunication, transportation, and utilities industries.

3:15 – 3:30 pm

Networking Break

3:30 – 4:15 pm

Using Business Capability Models to Enable IT Strategy and Drive Application Rationalization

Michael Khodosko, Senior Enterprise Architect, Suncor / PetroCanada [VIEW PDF](#)

Abstract: Business Architecture is still relatively new discipline in Oil and Gas domain in Canada and reference architecture models are still evolving. Big Energy companies around the world are trying to understand the value of such models and how can they generate value in real world. Do we need to build our own model? Where do we get one? Can we just buy one? We have a model – now what? This presentation will focus on practical use of the business capability model for Suncor/Petro Canada - the largest integrated Oil and Gas in Canada, and how it can be used to enable business strategy and capability-based roadmaps.

Bio: Michael Khodosko is experienced Enterprise Architect/Chief Architect currently working for Suncor and before joining Suncor, Michael worked as Chief Architect/IT Strategy consultant at the University of Queensland in Australia, University of Manitoba, Canada as well as an Enterprise Architect/Strategy Consultant in a number of industries, including Oil & Gas, Transportation, Insurance, Energy and Utilities, Telco across Canada, USA, Australia, Europe and Middle East. He holds Master's degree in Computer Science and MBA from the University of Calgary along with certifications in TOGAF™ and EACOE.

4:15 – 5:15 pm

Business Architecture Tool Vendor Panel

Moderator: Mike Rosen, Chief Scientist, Wilton Consulting Group, Director, Business Architecture Guild [VIEW PDF](#)

Abstract: Business architecture advances have seen rapid evolution of vendor tool support for the practice as well as the movement towards industry standards and reference models. Organizations are seeing real benefits from these advancements. This panel brings together the topics of vendor tool support for business architecture, the emergence of industry reference models and related vendor support, and the role of tool-related standards over the long-term. Panel discussions will engage vendors supporting the business architecture industry, standards work, and critical needs of the global community of practice.

5:15 pm

Closing Remarks / Adjourn

William Ulrich, President, TSG, Inc., Director, Business Architecture Guild
Whynde Kuehn, Principal, S2E Consulting, Director, Business Architecture Guild, Partner, BAA

Abstract: This closing session will recap the Summit, key learnings and what to do next. The session will also preview Thursday's hands-on, [Business Architecture Government Reference Model Workshop](#).

6:00 – 8:00 pm

| Networking at OMG Evening Reception