Business Architecture Innovation Summit – Day One
Tuesday, March 21, 2017

8:30 am – 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 am – 9:15 am Business Architecture 2017: Where We Are / Where We Are Headed
Co-Chair: William Ulrich, President, TSG, Inc., President, Business Architecture Guild
Co-Chair: Whynde Kuehn, Principal, S2E Consulting Inc., Director, Business Architecture Guild

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

BIO: William Ulrich is a management consultant, mentor, author and workshop leader. He is President of TSG, Inc., President and Co-founder of the Business Architecture Guild, and Co-Chair of OMG Architecture-Driven Modernization Task Force. A leading voice in business architecture, William is bringing together disparate forces to drive the discipline to the next level. He is also Partner in Business Architecture Associates, a Guild accredited training company. He is a Certified Business Architect (CBA)®.

9:15 am – 10:00 am Facilitating Business Transformation with Business Architecture
Christina Honore, Business Architect, Business Architect Nordea Life & Pension

Abstract: This case reveals how business architecture can play a significant role and have a profound impact. In many companies replacing an old legacy system with a new flexible system is an enormous undertaking where the business perspective quickly can be replaced by an all-consuming IT program. Learn how Business Architecture can help the business get back on-track and gain perspective of what is business-critical in a structured way. The case describes an attempt of a transformation from the traditional product-focused technology-driven solutions to a holistic stakeholder-focused business-driven approach. It then shows how business architecture contributed to this transformational program by providing a clear and complete view of the business issues, depicting the multi-dimensional relationships among business concepts, and identifying a holistic approach to deliver a business-driven transformation.

BIO: Christina Honore is a Business Architect at Nordea Life & Pension in Copenhagen. She has served as a business process analyst and has experience in IT projects and financial products. She specializes in business requirements elicitation, stakeholder management, business design, and transformative business projects.

10:00 am – 10:30 am Break

10:30 am – 11:15 am Using Business Architecture to Build a Better Boeing
Steve DuPont, Associate Technical Fellow, Enterprise Architecture, Boeing
Tom Strevey, Associate Technical Fellow, Enterprise Architecture, Boeing
Abstract: On July 15, 1916, William Boeing founded the company that became today's Boeing, changing the world forever. The speakers discuss how Boeing is using business architecture to increase its focus on innovation, growth, and productivity in its century going forward. They conclude by providing a vision for a powerful and agile business architecture practice that enables a sustainable competitive advantage.

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 practice of strategic business architecture at Boeing and contribute to the body of knowledge and industry standards in the business architecture discipline. Steve is a Certified Business Architect (CBA)®.

BIO: Tom Strevey has worked on defense and commercial programs across the enterprise giving him a very broad range of experience integrating diverse products and architecture. In his current role as an Associate Technical Fellow and Enterprise Business Architect, he is leading the establishment of business architecture practices and methods across The Boeing Company.

#### 11:15 am - Noon

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<thead>
<tr>
<th>From Strategy to Solution, Architecture in a SAFe Environment</th>
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<tr>
<td>Jeff Green, Business Architect, FedEx Express</td>
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<td>Cari Brose, Business Architect, FedEx Express</td>
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Abstract: This presentation will provide an overview of how FedEx is taking strategy to solution architecture using business architecture. We will explain how this architecture process is being deployed in parallel with Scale Agile Frameworks (SAFe) and provide an example and share their experiences.

BIO: Jeff Green has been in a business architect role at FedEx Express for several years and is leading the team in establishing the practice in the organization and integrating with Solution Architecture and SAFe.

BIO: Cari Brose is relatively new to the business architecture role, but has over 20 years' experience in business analysis. She is establishing the business architecture practice, developing artifacts, and building the team.

#### Noon - 1:00 pm

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#### 1:00 pm - 1:45 pm

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<th>Business Architecture Led Approach to Omnichannel Enables Advanced Customer Experience Management</th>
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<tr>
<td>Giovanni Traverso, Corporate Chief Business Architect, Huawei Technologies</td>
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Abstract: Huawei Technologies is a large, worldwide provider of telecommunications technologies based in China. Omnichannel is an important requirement for organizations that want to be "digital". Huawei and Vodafone developed a solution adopting what was called "Business Architecture-led approach". There we combined Customer Experience Management, value stream mapping, and capability mapping into an integrated method. We then used the outcomes of that method to decompose the Omnichannel solution into microservices delivered by an ecosystem of partners and orchestrate them in a cloud environment through APIs.

BIO: Giovanni Traverso has 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)®.

#### 1:45 pm - 2:30 pm

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<th>Business Capability - Designed for Agility</th>
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<td>Terence Zhang, Business Architect, Allstream</td>
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Abstract: Business capability as a foundational business architecture view, if developed well, is a powerful tool to drive clarity and transparency when a company embarks on transformational changes. As part of it BSS Renovation Program at Allstream Inc., the authors have developed a business capability mapping approach that proved useful in bridging the gaps between program strategies and business requirements, as well as between business needs and IT solutions. The approach was characterized by - engaging a collaborative network of business and IT SMEs to achieve the balance of abstraction and realization; decoupling capabilities at customer / service / resource layers to enable agility and flexibility; cross-mapping of capabilities with target organizational design and application functions to drive holistic transition roadmap.

BIO: Terence is a Certified Business Architect (CBA)® with the Business Architecture Guild and a Certified Architect with the Open Group (TOGAF® 9). He holds a M. Eng. degree in Technology Management from Carleton University (Ottawa). In the last 12 years of his 20-year career in the ICT industry, Terence has worked as a business architect and equivalent roles in 50+ business/IT transformation initiatives, advancing strategic goals by delivering business architecture blueprints, business solutions design, and implementation support. He is currently a Business Architect at Allstream Inc. as part of the Business Transformation team.

#### 2:30 pm - 3:00 pm

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<th>Industry Networking Break</th>
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#### 3:00 pm - 3:45 pm

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<th>Capability-Based Strategy for Radiology: Capability Assessment</th>
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<tr>
<td>Subodh Atal, Team Leader for Innovation, Social Security Administration</td>
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<tr>
<td>Lynn Newton, Program Manager for Strategic and IT Planning, Social Security Administration</td>
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Abstract: The Social Security Administration is embarking on a new and revamped IT planning and investment process. As part of this process, we are leveraging business needs and capabilities to drive planning efforts while exploring a product-based strategy. For SSA's online services, we are working on organizing investments around key business capabilities that are required to provide electronic services as well as customer support. An initial effort has focused on creating a customer engagement roadmap. This draft roadmap is based upon business capabilities that will fulfill the needs of customers seeking assistance, as well as those capabilities needed by SSA technicians who provide front-line support. We plan to establish a process where newly identified business needs and capabilities are assessed for feasibility and prioritization before incorporating into the existing roadmap.

BIO: Subodh Atal, Social Security Administration Team Leader for Innovation Subodh has been at the agency for 10 years. He has led agency IT projects for medical providers and business partners, as well as for Security and Authentication for SSA's my Social Security portal. Prior to SSA, he worked as a
Business Architecture Innovation Workshop

developer and software architect on various federal contracts.

**BIO:** Lynn Newton/Social Security Administration Program Manager for Strategic and IT Planning Lynn has 32 years with the agency, serving over the past 10 years in multiple capacities leading efforts to

| 3:45 pm - 5:00 pm | Business Architecture Lightning Talks - Mike Rosen, CBA®, Moderator |

*Moderator: Mike Rosen, Research VP for Strategic Architecture, IDC*

**Abstract:** Attendees will hear from a cross-section of practitioners and thought leaders, each of whom will share experiences and insights into various aspects of business architecture. These talks will do everything from inform people on success stories to stirring the imagination of what is possible with business architecture.

**BIO:** Mike Rosen is Research VP of Strategic Architecture at IDC. He is also VP and Co-founder of the Business Architecture Guild. For the past 15 years he was Chief Scientist of Wilton Consulting Group, which specializes in helping organizations create and get value from business and enterprise architectures. 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. Mike is a Certified Business Architect (CBA®).

| 5:00 pm - 5:15 pm | Day One Wrap-up & Day Two Preview |

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

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**Business Architecture Innovation Summit – Day Two**

**Wed. March 22, 2017**

| 8:30 am - 8:45 am | What Happens When the Summit Ends? Networking Opportunities, Getting Involved |

*William Ulrich, President, TSG, Inc. & Business Architecture Guild*

**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.

| 8:45 am - 9:00 am | Business Architecture Innovation Summit: Day 1 Recap / Day 2 Overview |

*Wynnde Kuehn, Principal, S2E Consulting Inc, Director Business Architecture Guild*

**Abstract:** This session will recap day 1 and provide an overview of day two. This is an opportunity to share feedback and look ahead.

| 9:00 am - 10:00 am | Industry Reference Model Panel |

*Moderator: Wynnde Kuehn, S2E Consulting Inc., Director Business Architecture Guild*

**Panelists:**
- Chalon Mullins, Kaiser Permanente, Health Care Industry
- Ivan Blinov, BMASTER, Inc., Financial Services Industry
- Amy Crockett, VF Manufacturing, Manufacturing Industry
- Michele Flakes, Aflac, Insurance Industry
- David Wilson, CMS Energy, Common Reference Model

**Abstract:** Panelists from each of the Business Architecture Guild Reference Models will be represented on a moderated panel. They will discuss their experience in establishing business architecture reference models, including capability maps, value streams and other business blueprints, where their work is to date, unique industry perspectives for each team and how businesses can leverage these reference models. Focus will be on work completed for the health care, financial services, manufacturing and insurance industry, as well as cross-industry strategic and supporting perspectives from the Common Reference Model team.

| 10:00 am - 10:30 am | Networking Break |

| 10:30 am - 11:15 am | Using Business Capabilities to Make IT Metrics Meaningful |

*Speaker: Diana Krohn, Sr. Enterprise Architect, United Airlines*

**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 presentation will cover the steps United has taken to provide IT reliability metrics by capability and the impact it's had on issue resolution and how it can influence our conversations.

**BIO:** Diana Krohn is a Principal Business Architect 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.

| 11:15 am - Noon | Bending Trends with Business Architecture |
Terry Lowe, Strategic Consultant, Humana  
Kishore Maranganti, Manager of Group Business Architecture, Humana

Abstract: In an effort to shape the market in which Humana competes we embarked on a bold initiative where we put the consumer’s health and well-being at the center of our business. This initiative not only helped bend health care trends but also allowed us to gain competitive advantage by being a consumer’s well-being partner. This course had a multitude of possible pathways that most in senior leadership believed could impact the health care trends. The difficulty was to determine which pathways would yield the biggest advantage and which trends Humana was most capable of impacting. Creating innovative solutions to shape the trends in health care required deep consumer understanding and extensive collaboration across the Enterprise to leverage or enhance existing capabilities. Where those capabilities were absent or very nascent we looked outside the organization in the form of partnerships or acquisitions to accelerate capability maturity. This dichotomy to enhance what we have versus look external to the organization sits squarely in the Business Architecture Sweet Spot. Initial engagement focused on showing value and gaining senior executive alignment on one pathway. We developed investment advantages through the use of strategic planning discipline that helped bridge the minefield between strategy and IT investments/projects. We relied on capability based planning as one of the tools that looked at best “mix” of resources required to develop this cohesion. Next we used our comprehensive view of investment needs to further assess capabilities for the remaining pathways to assist with decisions to leverage, build, partner, or buy additional capability maturity in route to bending the trends. The blueprint developed by our business architecture team had laid the foundation for the path forward to bend the health care trends affecting Humana. We will remain engaged to monitor and measure the results of investments in innovation and adjust blueprint as necessary to insure optimal results.

BIO: Terry is a former technology executive and entrepreneur with experience in Healthcare, Insurance, Retail, Manufacturing, Government, and Not-For-Profit organizations. He founded Adaptive InfoSystems, Inc. in 1998 focusing on IT consulting in the mid-market space. He sold the company in 2011 and joined Humana in 2012. Terry has over 20 years of experience in developing and delivering simple IT solutions for complex businesses problems for companies ranging from small startups to Fortune 100 companies including United Health Care, Cincinnati Bengals, Macy's, and Humana. He holds a Bachelor's of Science in Computer Science from Ohio University, Athens and a Master's in Business Administration from The University of Cincinnati.

BIO: Kishore Maranganti is a Manager of Group Business Architecture at Humana. He has over 20+ years of demonstrated experience in leading and executing complex, high value projects to promote organizational growth using emerging methodologies and technologies. Kishore immensely enjoys leading people, building relationships, driving successful teams, solving complex problems, and making a difference. He is spearheading the first business architecture team at Humana. He is responsible for strategic planning, strategic execution guidance, and business / IT alignment for the Group segment. He holds a Master's Degree in Computer Science and a Bachelor's of Engineering in Civil Engineering

Noon-1:00 pm  Lunch

1:00 pm - 1:45 pm  Building Demand for Strategy in Non-Strategy Organizations

Nick Malik, CEO, Vanguard EA

Abstract: Some companies proceed through their fiscal planning cycle without making any attempt to describe and distribute corporate strategies. The effectiveness of business architecture, and the value proposition of many business architecture practices, is reduced when strategies are hidden (or simply never created). In these companies, leaders may argue that creating a defined corporate strategy is an "academic exercise" or is "too constraining" on the business. Nick will describe techniques and opportunities to encourage senior managers to begin the process of developing corporate strategies and sharing them with the organization. He will focus on building executive visibility, demonstrating tangible results, and on the steady progression of maturity in strategic planning as enabled by enterprise architecture and business architecture.

BIO: As a leader in the Enterprise Architecture community, Nick has been a leading voice for including Business Architecture in the set of methods, skills, and responsibilities of an Enterprise Architecture team. In his practice, he has successfully used the concepts and methods of business architecture to help companies achieve change.

Track 2

1:00 pm - 1:45 pm  Track 2 - UML® Profile for BIZBOK Guide® - Modeling for Everyone

Jeff Crites, Business Architect, FedEx

Abstract: A business with decades of history and units consolidated from multiple companies faces very complex challenges in transforming to aligned, optimized value delivery. Business architecture provides a powerful set of methods for taking a common strategy, focusing key elements of the whole business around the top priority value streams, and driving focus on the same capability gaps across functional silos. Part of the power is the ability to model portfolio-level decisions spanning across product areas or lines of business, by consistently focusing all results to the same measures of business value for the same stakeholders. This paper provides this journey taken at Raytheon.

BIO: Jeff Crites is a Business Architect as FedEx. He is skilled in business architecture, business analysis, Scaled Agile Frameworks, and related business and IT disciplines. He previously worked at TEKsystems and Fidelity National Bank, and attended Purdue University. Jeff is a pilot and owns his own plane.

1:45 pm - 2:30 pm  Business Architecture at a Portfolio Level - Executing Business Strategy Across Market Areas and Functions

Speaker: Brian Potter, Raytheon

Abstract: A business with decades of history and units consolidated from multiple companies faces very complex challenges in transforming to aligned, optimized value delivery. Business architecture provides a powerful set of methods for taking a common strategy, focusing key elements of the whole business around the top priority value streams, and driving focus on the same capability gaps across functional silos. Part of the power is the ability to model portfolio-level decisions spanning across product areas or lines of business, by consistently focusing all results to the same measures of business value for the same stakeholders. This paper provides this journey taken at Raytheon.
BIO: Brian Potter is a business architect within Information Technology at Raytheon. He has spent the last two years identifying gaps in business unit and enterprise capabilities and working to develop the architectural vision, strategy and planning to address those gaps. Previously, he spent twelve years as a Quality Manager (software, supply base), R6s Expert (advanced manufacturing), and IT Project Manager. Earlier professional experience included BiosGroup (adaptive agent-based software) and Hewlett-Packard (business applications, middleware, online store).

Track 2
1:45 pm - 2:30 pm  | From Meta Models to Working Models

Frank Kowalkowski, President, Knowledge Consultants

Abstract: Using the meta model for an organization to produce something useful and pragmatic for analysis and analytics is one of the challenges today. The Business Architecture Guild has a meta model for the business as well as meta models for the major components. There are other meta models that result from management disciplines like value chain, balanced scorecard and any of the 60+ other approaches to characterizing the business. All these are also available for conversion to a working model that describes that specific business. This presentation describes a technique used in over 30 projects for converting these meta models to 'working models' that represent an organization. This provides the architect with a baseline structure to work with in developing execution alternatives with management.

BIO: Frank Kowalkowski is President of Knowledge Consultants, Inc., a firm focusing on business performance, business/IT architecture and business analytical techniques. He has over 30 years of management and consulting experience in a wide variety of industries. He has been involved with many projects including business analysis, process management, business performance measurement, business and competitive intelligence and knowledge management. In addition to being a keynote speaker at international conferences as well as a conference chair, he has written numerous papers and spoken at conferences on a variety of subjects. He conducts frequent seminars nationally and internationally on a variety of business management and information technology topics. He is the author of a 1996 book on Enterprise Analysis (Prentice - Hall, ISBN 0-13-282-3365) and numerous papers.

Networking Break

2:30 pm - 3:00 pm  | Networking Break

2:30 pm - 3:45 pm  | Success from a Young Enterprise Business Architecture Team

Mary Sue Moore, Principal Business Architect, Asurion
Aaron Burns, Director Enterprise Business Architecture, Asurion

Abstract: As a young Enterprise Business Architecture team, we've had to overcome challenges to deliver value to our partners across the corporation. These challenges range from the difficulty of gaining traction with abstract models to dealing with time-poor partners to providing influence in a highly competitive organization. In this presentation, we will briefly share our real world challenges and then focus on two case studies where we partnered with key business leaders to provide value: one at the objective based planning level which utilizes capability models and assessments and the other at the implementation planning level which utilizes the integration of product models and implementation information such as Clients, Geos, and Applications. In each case, we will be illustrating the value from a leader's perspective, how it improved our EBA practice, and the challenges we overcame to deliver it.

BIO: Mary Sue Moore is the Principal Business Architect for Asurion, aligning business and technology teams. She has integrated business process architecture through business and process modeling, model management, and discipline definition for Model Driven BPM-SOA. Mary Sue has been a Process Definition Consultant, Project Manager, and Software Engineer. Along with device and data protection insurance, her background includes commercial finance, telephony, healthcare insurance, and electrical controls. Mary Sue is an alum of Western Carolina University, University of Central Florida, and Ithaca College.

BIO: Aaron Burns has a passion for translating business opportunities into solutions. His career has been focused on distilling common "productizable" solutions from custom or diverse solution implementations. Aaron has worked in a wide variety of roles from application developer to business analyst, from product owner to enterprise architect. He is currently a Director of Technology at Asurion where his focus is establishing a practice of business architecture. Aaron earned a BS in Management Information Systems and a MS in Computer Systems Management from the University of Maryland.

3:45 pm - 4:30 pm  | Capability-Based Strategy for Radiology: Capability Assessments in the Real World

Peter Hoots, Principal Enterprise Architect, Kaiser Permanente
Chalon Mullins, Principal Enterprise Architect, Kaiser Permanente

Abstract: When it was all said and done the sponsoring physician reflected, "Sometimes it's the journey that teaches you a lot about your destination." The journey, in this case, involved repeated attempts to get funding for a new Radiology Information System (RIS) for the Kaiser Permanente Radiology department in Northern California. After the project sponsors were told "No." numerous times they turned to the Kaiser Permanente Business Architecture to help them reframe the discussion using a business architecture approach. The results were a clearly articulated vision, goals, strategy, and capabilities that were used to create a roadmap that made the benefits so clear that the answer to the next request was an enthusiastic "Yes!"

BIOS: Chalon Mullins and Pete Hoots are both Principal Business Architects at Kaiser Permanente. Chalon has been on the forefront of enterprise architecture for decades and helped organizations adopt and apply it appropriately to solve business problems. Chalon is heavily involved with the Business Architecture Guild, where he has contributed to, among other things, the development of the Health Care Provider and Insurance industry reference models. Pete has spent much of his career in the high tech sector, but since joining Kaiser Permanente he has become passionate about healthcare and Kaiser's mission. Pete is the product owner of Kaiser's Business Architecture Platform and head Business Architecture trainer.

4:30 pm - 5:25 pm  | Business Architecture Case Study Panel

Panel Chair: Janice Lewis, Pfizer

Abstract: This panel brings together business architecture case study submitters to share a summary of their case study submissions. These case studies will be published post-event. The discussion will include issuance of the first annual "BA Guild Case Study Award" at the end of the panel session.

BIO: Janice Lewis is the Director of Enterprise Architecture at Pfizer. Her focus is on delivering the connected view of the enterprise to stakeholders across the company to provide line of sight from strategy to execution and business entry points to Pfizer business technology products and services.
Janice is a Certified Business Architect (CBA)®.

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<th>Time</th>
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<tr>
<td>5:30 pm</td>
<td>Closing Remarks / Adjourn</td>
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<tr>
<td>6:00 pm - 8:00 pm</td>
<td>Networking at OMG Evening Reception</td>
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**NOTE:** If you register for the Technical Meeting Week, you do not have to pay the additional fee(s) to attend any or all of the special events. If you register only for special events, the special fees apply.