

## Business Architecture Innovation Summit – Day One (Tuesday, March 22, 2022)

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

### 8:45 – 9:15 am | Welcome Address: Business Architecture 2022

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

*Co-Chair: Whynde Kuehn, Managing Director, S2E Transformation Inc., Business Architecture Associates, Director 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 Co-founder 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)<sup>®</sup> 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)<sup>®</sup> and on the Guild certification committee.

### 9:15 – 10:00 am | How Business Architecture Enables Strategy Execution (Biopharmaceutical)

*Pete Caldwell, Director of Business Architecture, Abcam*

*Clare Gill, Business Architect, Abcam*

**Abstract:** Abcam is an established life sciences company with an audacious growth strategy and is using business architecture to help unlock constraints, drive innovation and deliver profitable growth. Abcam was founded in 1998 in Cambridge, UK, with the aim of providing high quality antibodies to scientists working in biological research. Today, it is listed on the AIM and Nasdaq exchanges, sells to over 100 countries, has manufacturing operations on four continents and provides a range of proteomic tools and services designed to support life science researchers and help accelerate their next scientific breakthroughs. Two years ago, the company invested in business architecture to provide enhanced focus during a major growth phase, instill greater maturity into the company's strategic decision-making processes, ensure efforts were directed to areas of highest priority and enable strategy execution. This paper describes some of the achievements and successes that have been delivered as a result, using tools such as the business model canvas, the VMOST framework, a business-wide capability model, a capability maturity assessment process and a comprehensive change heatmap. In addition, it highlights how these tools have been used to provide the business with improved resource planning and technology roadmap and the ability to better deliver cross-functional strategic projects. This session will provide example approaches,

visualization techniques, key learnings and insights generated along the journey applicable to other sectors.

**Bio:** Pete Caldwell joined Abcam in 2020 where he is currently the Director of Business Architecture. Prior to that he spent the twenty years in management consulting with KPMG, Boxwood and Cambridge University, specializing in business strategy, operating models and business architecture. Before that, he spent ten years in operational leadership roles in electronics and automotive manufacturing. He has authored a number of papers in the areas of capability maturity diagnostics and diagnostic benchmarking, and how they support strategy definition and deployment. He holds degrees in Engineering, Manufacturing and Management from the universities of Exeter and Cambridge.

**Bio:** Clare Gill has worked in business architecture and organizational structuring for 5 years and is a Business Architect at Abcam. She is the designer of Abcam's organization-wide capability model and maturity assessment process and supports business functions in addressing priorities and enabling strategy deployment. Prior to Abcam she worked for a large UK retailer and a leading risk and insurance provider, supporting large scale structural redesign and execution.

10:00 – 10:20 am | Break

10:20–11:05 am | Improving Customer Experience with Business Architecture and Agile Approaches

*Suprithi Mukhrjee, Director, Business Architect, Fidelity Investments*

*Tobin Spear, Product Area Leader, Digital Workplace, Fidelity Investments*

**Abstract:** The ability to listen to the customer and use their voice to inform and prioritize product strategy is one of the biggest challenges of product area management today. Mapping, rationalizing and standardizing strategy to enable business partner alignment makes this a very complex topic. Business composability defines the maturity of an organization to manage this intricate ecosystem and one of the founding pillars of business composability is business architecture. This session presents a dynamic case study that leverages the business architecture framework and utilizes agile practices to increase transparency and maximize efficiency while remaining focused on customer needs. The approach suggested in this case study is loosely inspired by Simon Sinek's Golden Circle and has its roots in business architecture and the agile framework. The strategy is to always start with the 'why'. Is the customer voice incorporated into the 'why'? Why is a particular initiative prioritized? Why is a particular prioritization strategy being used? The next step is to define the 'how'. How will the work be executed? Are the right people, process, technology and information being considered to more fully define the 'how'? How do these decisions affect organizational culture? Finally, the 'what' must be mapped. What capabilities need to be worked on to implement the value stream? The answers to these questions help us incorporate the customer's voice in product management and manage work in a strategic manner, thereby increasing the business composability index.

**Bio:** Suprithi Mukhrjee has over 25 years of experience in Information Technology, including 10 years of business architecture experience. She has a M.S. in Industrial Engineering and holds various certifications including project management, Agile scrum master, certified product owner, Lean Six Sigma Master Black Belt and FINRA Series 99. She joined Fidelity in June of 2017. During her tenure at Fidelity, she has led several business architecture efforts in various business units. Presently, she

is building the business architecture framework for Digital Workplace and coaching peers on ways to implement the framework across the product lifecycle.

**Bio:** Tobin (Toby) Spear is a leader in the Digital Workplace at Fidelity Investments. Fidelity helps 40 million people feel more confident in their most important financial goals, manages employee benefit programs for over 22,000 businesses, and supports more than 13,500 financial institutions with innovative investment and technology solutions to grow their businesses.

As the Product Area Leader for Fidelity's Digital Workplace (DW), Toby provides the vision and oversight to ensure Fidelity's associates have an integrated, engaging digital experience along with the tools, training, and support to do our best work on behalf of our customers, clients, and partners.

Over his 16-year career at Fidelity, Toby has been a leader in several product development, sales, planning and relationship management roles. Prior to joining Digital Workplace, Toby was leading a large sales and planning organization within Fidelity's Personal Investing business. Toby earned an MBA from Boston University and a Bachelor of Arts from Syracuse University. Prior to Fidelity, he spent several years as a management consultant, working with many of the world's largest financial services firms. Toby lives in Southlake, TX with his wife and two children.

**11:15 am – Noon | Building and Scaling an Enterprise-wide Business Architecture Practice**

*Payal Lamba, Enterprise Architecture Practice Lead, Telstra Corporation*

**Abstract:** When one is a solution designer recommending solutions requiring a considerable amount of capital, one wants to be absolutely sure that the recommended solutions are aligned to the enterprise architecture blueprints and reference models. One is accountable to ensure they are spending company capital to build capabilities or new features in accordance with the company's strategic direction. If the organization is going through a reset/transformation, these artifacts can become out of date or lost as teams disband. When there is no reference/baseline and a large integrated business to run, solutions can pile up very quickly adding more complexity to technology and operational processes. So how does one create an architecture practice which is resilient enough to survive any transformation and build the business focus into the DNA of every single employee? What are the various aspects of business architecture that must be weaved into this focus? Join this session to find out.

**Bio:** Payal Lamba has worked in the technology, strategy and architecture space for more than 7 years. Prior to that she was a business analyst for 10+ years. She has maintained a strong focus on traceability in anything done to the requirements of the business. Projects, programs and designing an organization should be no different. Her current role with Telstra is to setup, scale and lead an enterprise architecture practice which revolves around the needs of the business. With business architecture at the heart of everything she does, she is currently in the process of building standards, designing processes and a capability framework to operate a collaborative, business-driven in-house consultancy, which will govern very complex people, processes and technology environments.

**Noon – 1:00 pm | Lunch**

1:00 – 1:45 pm

## Accelerating Regulatory Compliance and Organization Maturity Through Business and IT Alignment

*Faizal Pakrudeen, Associate Director of Architecture, ODST, Public Company Accounting Oversight Board*

*Ivan Blinov, Business Transformation Architect Consultant, Public Company Accounting Oversight Board*

**Abstract:** The Public Company Accounting Oversight Board (PCAOB) uses data and information technology assets to increase productivity and drive continuous improvements across the organization. Effectively tracking strategic progress requires adaptation of performance measures and indicators to inform future organization-wide planning efforts and support regulatory compliance. Capability-based planning is a powerful mechanism to ensure that strategic business plans drive the enterprise from a top-down approach, assist in aligning IT with the business and help focus IT architects on the continuous creation of business value. A combination of capability-based planning with performance insights across an organization provides feedback to the business about each initiative. Using reference models as an initial set of capabilities helps accelerate the organization's maturity growth by reducing time to start using capability-based planning. The PCAOB enterprise architecture team is pleased to share a unique perspective of evolution of the PCAOB capability catalog and enterprise-level performance management platform using business architecture. Collaboration is the key for successful business and IT alignment. The capability catalog provides the shared language and visibility to bridge strategy, execution and organization maturity.

**Bio:** Faizal Pakrudeen is the Associate Director, Architecture, Office of Data, Security and Technology in the PCAOB. Faizal Pakrudeen is a TOGAF certified enterprise architect with experience in leading architecture and engineering organizations for commercial and public sector agencies. Faizal holds a bachelor's and master's degree in Computer Science and Electrical Engineering and is a certified project management professional (PMP).

**Bio:** Ivan Blinov is a Business Transformation Architect, a Certified Business Architect<sup>®</sup> and serves as Business Transformation Architect to support the organization's knowledge and role of performance measures to provide the Board with effectiveness of innovations in IT and oversight of business transformation. Ivan holds a master's degree in Computer Science from Moscow Power Engineering Institute, an MBA from Virginia Tech and a Stanford University Professional Certification in Innovation and Entrepreneurship and Digital Transformation.

1:55 – 2:40 pm

## Using Business Architecture As the Organization's Digital Twin

*Lorraine Pestell, Acting Director, Information Strategy & Architecture, Queensland Government, Australia*

**Abstract:** The term "Digital Twin" often refers to spatial models of a physically built environment or land mass, where intersections of rich datasets enable visualization and analytics covering a wide range of use cases. The Queensland Government Enterprise Architecture is currently undergoing a refresh to meet the demands of new Digital Economy and Digital Government Services strategies, with citizens, communities and businesses at its heart. Using business architecture techniques, capabilities, services and information assets, we are creating a Digital Twin of the Queensland Government which abstracts the complexity of agency structures from the customer's pathway to successful service outcomes.

**Bio:** Lorraine Pestell has held IT leadership, enterprise architecture and portfolio management roles in public and private sector organizations around the world. In recent years, her work has concentrated on designing digital, data and ICT strategies using business architecture models, lean and agile methods and real-world risk and benefits management. Her role within the Queensland Government Customer and Digital Group involves developing a whole-of-government policy framework to support the state's Digital Economy and Digital Government Services Strategies and collaborating with agencies and departments on enterprise architecture and investment roadmaps. Lorraine is also the author of the contemporary fiction novel series, "A Life Singular".

2:40 – 3:05 pm | Break

3:05 – 3:50 pm | **Special Session: Business Architecture Core Metamodel (BACM) Standard Update**

*Lloyd Dugan, Chief Architect, BPM, Inc.*

**Abstract:** From representing and mapping business architecture artifacts to aligning and cross-referencing business process management (BPM) artifacts, outcomes as achieved or needed by capabilities are the key to understanding the respective viewpoints of business architecture and business process management. The differences in granularity and scope of capabilities versus corresponding processes can be resolved by seeing outcomes as the central concept linking these viewpoints. This presentation guides one through these conceptual complexities with referenced examples and shows how the forthcoming Business Architecture Core Metamodel (BACM) OMG standard and related efforts empower business architects to create and deliver improved business value.

**Bio:** Lloyd Dugan is a Business, Enterprise, Process and Solution Architect with 35 years of experience in model-driven process improvement and software design, covering both public and private clients. He is internationally and nationally recognized, a published expert in BPM and BPMN, a frequent speaker at national and international conferences on BPM, enterprise architecture, and business architecture, a Business Architecture Guild member, a member of the Business Architecture Metamodel Team and BPM Alignment Team, a representative on the Business Architecture Capability Metamodel (BACM) Team for the proposed OMG standard and co-author of first Guild whitepaper on BPM alignment with business architecture and reviewer on the second.

4:00 – 4:45 pm | **Leveraging Business Architecture to enable Dynamic Rules-Based Routing: A Case Study**

*Ken Williams, Business Architect, AIG*

**Abstract:** When we distill the value stream and its stages down to the corresponding business processes, we are often faced with multiple, overly complex, overlapping process maps that in themselves don't provide a clear holistic view. When working with stakeholders and solution architects it is further challenging to find the "happy path". Dynamic rules-based routing provides an alternative method to visualize workflow that is event and state-based, in an easy-to-understand manner. This session will trace the execution of a transformation initiative from strategy development through impact analysis, target state architecture visualization, initiative definition, design solutioning, and to the implementation of a dynamic rules-based workflow to deliver straight

through processing and an improved customer experience. All the while showcasing the inputs that support the creation of the routing map and the disciplines and deliverables it helps enable. Through each phase of the project business architecture had a key hand in informing the strategy team, communicating with the stakeholders, assisting the solutions team, and realizing the benefits of the project.

**Bio:** Ken Williams is Business Architect for Life and Retirement Centralized Global Operations at AIG. Together with his team he enables execution of strategic and tactical transformation through the alignment of business architecture, change management, benefit realization management and agile project management. Ken is a Certified Business Architect (CBA)<sup>®</sup>, Certified Change Management Professional (CCMP)<sup>®</sup>, Project Management Professional (PMP)<sup>®</sup>, PMI Agile Certified Practitioner (PMI-ACP)<sup>®</sup> and Certified Customer Experience Practitioner (CCXP)<sup>®</sup>.

#### 4:50 – 5:15 pm | Industry Reference Model Update & Day 1 Wrap-up

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

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

**Abstract:** The Guild Co-Chairs will provide an update on available industry reference models and their levels of maturity and general industry utilization. They will additionally open the floor to discuss feedback and questions from Innovation Summit Day 1.

## Business Architecture Innovation Summit – Day Two (Wednesday, March 23, 2022)

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

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

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

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

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

### 9:15 – 10:00 am | Business Capability Based Approach to Design Stable Microservices Composition

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

**Abstract:** Microservice architectural style is being used to designing flexible, agile, resilient and scalable enterprise applications. It is an approach to developing a single application as a suite of small services, each running in its own process and communicating with lightweight mechanisms. The style is usually compared against the monolithic style in which applications are developed as single units. The problem with the monolithic style is that, change cycles are heavy and tied together. But for the microservices style to address this problem effectively and avoid making the situation poorer, it should use an effective method for componentizing the application into stable services composition. By stable here, we mean the components are coherent, loosely coupled, with simple connections and do not collapse with change. The problem here is that, it's hard to figure out exactly where the component boundaries should lie. This article addresses this problem by articulating an approach to design stable microservices composition by using the capability map as context and coordinating their interactions and dependencies by using the value streams-to-capabilities map. There are two advantages in aligning the business architecture with the microservice composition. Using the business architecture as a context for the componentization method, help designing stable architectures and help organizing the enterprise digital capabilities into modular reusable components. Also, it views the operational side of the business architecture, and provides insights into its actual usage and impact. These insights can feedback into the business transformation scenarios.

**Bio:** Hassan Ahmed Hassan Mohamed was introduced to business architecture about 6 years ago and exploded into the profession about 3 years ago with courses and certification as a Business Architect. He established a business architecture practice for a large insurance company focusing mainly on capabilities, value streams, information and working with multiple other practices within the company having found ways for all to come together effectively. Hassan's background is primarily in IT and he has worked as a Manager, Business Analyst, created a Business Analyst Competency Centre, dabbled in Project Management, Account Management and as a Scrum Master.

### 10:00 – 10:20 am | Break

## 10:20 – 11:05 am | Using Business Architecture in Strategy Development and Execution

*Lara Meyers, Business Architecture in Strategy Execution, Powerlink*

**Abstract:** Business architecture at Powerlink is a key function which is part of strategy development and execution. The Strategy Team is engaged in a full strategy development process and just released its new enterprise organizational strategy in July 2021, which will last the next 3-5 years. The strategy was developed utilizing the methodology outlined in the book “Playing to Win” by Roger L. Martin. In this process after working out ‘where to play’ and ‘how to win’, one then goes about determining what capabilities are needed and what management systems are required to implement it. The Business Architect manages business capabilities that are then used to inform the portfolio of work that is used to implement the strategy and support the business moving into the strategy execution phase. This session discusses a practical approach to using business architecture fundamentals to support these strategy phases and where business architecture can provide most of its value within strategy to support an enterprise perspective of organizational capabilities and insights to support an enterprise perspective in strategy execution. It highlights the pitfalls, challenges and the risks in operating within the strategic arena and approaches to overcome them.

**Bio:** Lara Meyer’s career in business architecture spans the United States and Australia – it branched into architecture after working with process architectures, business process management and consulting. She has delivered guest lectures at Queensland University of Technology to the Master’s Program including topics surrounding capability assessments and maturity models. She has also recently published papers on topics including capability maturity models, holistic BPM and process architecture. Lara has been a Business Architecture Guild member for many years and helped start a local community in 2020. Lara is currently heading the business architecture function at Powerlink Queensland in Brisbane, Australia.

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

*David Rogers, Head of Information, Morasha Olami, Inc.*

**Abstract:** This presentation builds upon the one delivered during the 2021 Summit. Having stabilized the core business for Olami in the first 18 months, the leadership kicked off its strategy to transform itself based on this foundation of successful digitization. To succeed, organization had to be formulated and implemented while campaigns and channels had to be planned, launched and sustained - all at once! Business architecture applied by rational actors in the chaos would provide the framework and the tools for allowing a level playing field comparison of all priorities in their natural context of the vision of what they wanted to become.

**Bio:** David Rogers has facilitated strategic change and operational excellence for twenty years. Drawing upon his unique blend of competencies in architecture, information management and operational strategy, David partners with subject matter experts to learn from them, adapt their knowledge and methods and drive focus toward achievable paths to their business goals. David has been a management consultant for firms in biotechnology, cloud computing, education, financial services and insurance, non-profit administration, pharmaceuticals, software engineering, telecommunications and transportation. Currently, he serves as Olami's Head of Information.

Noon – 1:00 pm | Lunch

## 1:00 – 1:45 pm | Leveraging Business Architecture in Software Design

*Rajinder Singh, Principal Business Architect, H&R Block*

**Abstract:** Leveraging business architecture in software design is a game changer in many ways for an organization. It won't just provide logical composability for a business, but can also play an important role in software design. Key to a good software design is the right composability of its reusable components. Architecture patterns in an organization may vary from object oriented to service oriented and microsites or microservices. The fact that underlying business objects stay the same, business architecture can be utilized to conceptualize and define these basic building blocks for an application or experience. One can start by understanding business strategies and needs and then transpose them in terms of business capabilities. Capability decomposition techniques then can be utilized to uncover or conceive lower-level capabilities. Business capability maps help in two very discrete ways: 1) decomposed capabilities direct the design of microsites, APIs or services at the right level of scope and granularity and business capabilities can be used to translate, direct and organize feature teams to enable DevOps and 2) a business architecture artifact that is very pertinent to software design is value stream. As product teams ideate on the right user experience, value streams act as a tool to align with expected user journey. For software design, value streams specifically address the orchestration of building blocks to provide desired user experience. With additional details, this can also identify and direct the interface design among the defined reusable components.

**Bio:** Rajinder Singh has a MBA from the University of Kansas and has worked in IT for last 25 years and spent time in fortune 500 companies including Sprint (Now T-Mobile) and 14 years at IBM. During his IT tenure, he was a developer, lead, project manager, architect and product owner. He also started a business architecture practice at H&R block about 3 years ago and was able to establish business capabilities for the entire organization. He was able to articulate the benefits of business architecture in business and IT and align data, application and infrastructure architecture with organizational capabilities.

## 1:55 – 2:40 pm | Business Capability Dimensions - Understanding What Makes a Capability Tick

*Pedro Alvarez, Business Architect, UPS*

**Abstract:** A business capability is composed of 4 dimensions: stakeholders, processes, technology and information. These are the fundamental components that make a capability come to life. In this session examples will be explored to demonstrate how these capability enablers are the key to capability-based planning when realizing value streams to meet organizational needs. Relationships between these dimensions will be addressed and how they help define strategies and roadmaps as well as the use of capability increments to deliver scalable solutions to business and technological problems.

**Bio:** Pedro Alvarez is a Business Architect at UPS, with 25 years of IT experience in business systems analysis, business architecture and enterprise architecture. He manages UPS's enterprise-wide business architecture practice, which includes ownership of the Business Architect role, development and stewardship of UPS's Business Capability Model, Value Streams, and Information Map, as well as maintaining enterprise-wide standards and COE for business architecture. Pedro is also responsible for the continued adoption of business architecture across the UPS IT organization, along with his role as Enterprise Business Architect for Strategic Initiatives and Emerging

Technologies. In prior roles, he served as director of UPS's Business Analysis Practice, Business Systems Analyst, Business Process Analyst and Technical Writer.

2:45 – 3:05 pm | Break

3:05 – 3:50 pm | Special Session: Strategy Execution: An Incomplete Component of Business Education?

*Brian Cameron, Associate Dean for Professional Graduate Programs and Executive Education, Penn State University, Smeal Business College*

**Abstract:** In their 2001 book, "The Strategy-Focused Organization", Robert Kaplan and David Norton reported that "a mere 7 percent of employees today fully understand their company's business strategies and what's expected of them in order to help achieve company goals." Furthermore, in most industries, strategy is not static and is tweaked as conditions on the ground change. No plan survives contact with the enemy. How can we hope to successfully execute something that is changing and that a very low percentage of people fully understand? This question is at the heart of the problem. For the most part, organizations today are no better at executing their business strategies than they were twenty years ago. We've seen decades of research and teaching in the area of strategy execution yet little improvement in our ability to execute business strategy. The MBA Roundtable and Business Architecture Guild partnered on a survey to better understand how the topic of strategy execution is approached in graduate business education today and suggest possible reasons why strategy execution still remains elusive in many organizations. This session will debrief the findings of that study and also suggest a possible future role for business architecture in graduate business curriculums.

**Bio:** Brian H. Cameron is the Associate Dean for Professional Graduate Programs and Clinical Professor of Information Systems in the Smeal College of Business at Pennsylvania State University. Dr. Cameron is also the Founding Director of the Center for Enterprise Architecture in the College of Information Sciences and Technology at Penn State and Founding President of the Federation of Enterprise Architecture Professional Organizations (FEAPO). He designed and implemented the first online Enterprise Architecture Master's Program in the world. Dr. Cameron was awarded the NPA Career Achievement Award in 2011 for efforts related to founding FEAPO, building the Center for Enterprise Architecture and associated service to the enterprise architecture profession.

4:00 – 5:00 pm | Business Architecture Vendor Tool Panel

*Chair: Jason Smith*

**Abstract:** The Business Architecture Guild (Guild) has a tool vendor program that engages vendors that agree to adopt the pending Business Architecture Core Metamodel standard, which has the ability to import and enable the advancement of the Guild's industry reference models. Some of these tool vendors will join this panel to discuss the latest advancements in tools and technologies available to organizations today.

**Bio:** Jason Smith has more than three decades of experience as a software engineer, researcher and author. He currently serves as VP/Technical Director for the Object Management Group (OMG) standards development organization where he works with the world's leading experts in technical modelling and ontologies, oversees processes for technology specification adoption and chairs the

Architecture Board. Additionally, Jason serves as CIO of OMG, leading modernization of the technical infrastructure supporting several industry-leading member communities. Prior to OMG, Jason founded Elemental Reasoning, served as Director of Innovation and Lead Researcher at TSRI, worked as a Postdoctoral Researcher at IBM and authored the ground-breaking book, *Elemental Design Patterns* (Pearson Publishing). A board member of the Robinson Center for Young Scholars, Jason graduated from University of North Carolina at Chapel Hill with a PhD in Computer Science, following prior degrees in Physics and Mathematics.

**5:00 – 5:15 pm | Day 2 Wrap-up**

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

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

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

## Business Architecture Innovation Summit – Day Three (Thursday, March 24, 2022)

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

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

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

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

**Abstract:** The Guild Co-Chairs will discuss content, reference models, training referrals and working groups available to members of the Business Architecture Guild and answer any relevant questions on that topic.

### 9:15 – 10:00 am | Leverage Reference Models to Enable a Business-oriented IT Planning

*Rumeng Zhu, Senior Consultant, Huawei*

*Hengchun Zhou, Senior Director of IT, Deppon Express*

**Abstract:** Deppon Express is a leading logistics service provider in China. To adapt to a rapidly changing business environment, Deppon increases its IT investment each year to empower logistics with technology. However, with an increasing number of IT systems, IT silos lead to difficulties in data integration and similar functions are repeated in different IT teams. The new CIO opted to embrace business architecture to achieve business-oriented IT planning. We leveraged the Transportation Reference Model published by the Business Architecture Guild to frame a common language across business and IT teams and establish a foundational business architecture for Deppon in 3 months and simultaneously trained a capable business architect team. Following the project, the Deppon business architect team now follows this new approach and uses the foundational value streams and capabilities in several different IT planning areas. All the while, the Deppon IT team is becoming more business-oriented.

**Bio:** Rumeng Zhu is a senior consultant at Huawei Technologies, focusing on business architecture, enterprise architecture and digital transformation planning. She is also a co-leader and long-term contributor of the Manufacturing Industry Reference Model team in the Business Architecture Guild. Rumeng Zhu is a Certified Business Architect and TOGAF Certified. In the last 2 years, she has actively promoted BIZBOK in China, helped multiple customers build their business architecture foundation and carried out digital transformation planning, covering multiple industries such as aviation, logistics and manufacturing.

**Bio:** Hengchun Zhou is Senior Director of the IT architecture management department at Deppon Express. He has over 14 years of experience serving the logistics industry in the area of information technology and has a deep understanding of industry best practices and solutions. He continues to be responsible for the construction of a big data technology system and core business system, along with the architecture design for multiple large-concurrency and high-availability business systems.

### 10:00 – 10:20 am | Break

## 10:20 – 11:05 am | Implementing Artificial Intelligence with Business Architecture

*Shruti Pandit, Senior Director of Agile Transformation, Internet Travel Solutions*

**Abstract:** Even though artificial intelligence (AI) technology is promising, real-world deployment presents a challenge to many organizations. Budget and resources are often limited and organizations are reluctant to spend on technology that has not yet proven profitable for a hypothetical return on investment. Based on these aforementioned challenges, company leaders need help gaining clarity to improve their decision-making as it relates to AI investments. This is where business architecture comes into play with its holistic approach. This session will shed light on 4 aspects of business architecture that enable artificial intelligence deployment: value streams, capabilities, information and organization. This session will focus on building a strategic AI roadmap and include multiple examples that tie back to business architecture's role. The discussion will center on the 5 pillars of AI adoption: strategy, data, technology, people and governance as well as leverage an AI maturity framework.

**Bio:** Shruti Pandit is an agile and a cloud enthusiast who believes in the power of blockchain, cloud, AI and agility. She is an active contributor, speaker and participant in agile and Devops communities in India. Awarded with "Women of Excellence Award" in 2nd National Conference by Elite Club of London in March-2019 in Delhi, she is an award-winning speaker and an agile leader. With a background in agile, cloud, Devops and cyber security, her career expands over several industries including banking, cybersecurity finance and travel. She was also voted amongst top 101 Global Diversity and Inclusion Leaders at 6th Women Leadership Congress and Awards in January-2019 in Mumbai. Currently serving as a Senior Director of Agile Transformation at ITS, she is passionate about helping her clients learn agile, blockchain and cloud strategies needed to succeed irrespective of market activity.

## 11:15 am – Noon | Case Study: Ninja Business Architecture: How Monsanto Created a Business Architecture Culture with No EA In Sight.

*Darin Powell, Global Digital Leader of Transformation Strategy & Experimentation, Bayer AG Crop Sciences*

**Abstract:** This session will convey a tale of how one business architect can make a difference. After being hired as a global Business Architect by Monsanto, I was surprised to discover what they thought was a BA was actually a Business Partner. However, I immediately understood a BA could transform the company and introduced them to it. The problem was that no Enterprise Architecture team existed and the company had no desire to form one. How did I manage to not only open the eyes of a corporation to business architecture, but also have it become viral and integral to the business? Understanding the value, influencing key stakeholders and a lot of partnering. This work helped not only Monsanto, but Bayer as well. Join this session to learn more.

**Bio:** Darin Powell has worked in the role of business architect for three major corporations (Bayer, Boeing and Monsanto) spanning multiple manufacturing genres. Most notably, he launched business architecture principles, tools and methodologies at Monsanto, without the aid of an existing enterprise architecture function. Leveraging the value of the business capability map he led development on and opened the way for business architecture to be adopted and used at that company and did the same thereafter at Bayer. He also contributed and worked on the Manufacturing Industry reference model team which drafted the BIZBOK® Guide.

Noon – 1:00 pm | Lunch

1:00 – 1:45 pm | Architecting Growth

*Rick Dizy, Growth Committee Chair and Board Member, Certified Management Consultants of Saskatchewan*

**Abstract:** The Certified Management Consultants of Saskatchewan (CMC-Saskatchewan) in alignment with the Canadian Association of Management Consultants (CMC-Canada) needs to grow to fulfill its vision of a thriving and diverse profession that contributes to Canada's prosperity, with CMC recognized as the pinnacle of management consulting practice. This session will outline how CMC-Saskatchewan is using business architecture to plan and execute its business strategy. Participants will learn more about the practical steps a business architect may take to help organizations develop strategy, architect change, plan initiatives, deliver solutions and measure results. In addition, those attending will discover how the business architecture guild reference models can assist in accelerating the creation of a tailored business architecture that excites and aligns the strategy team.

**Bio:** Rick Dizy is the Growth Committee Chair for the CMC-Saskatchewan. For over 5 years, he has helped foster excellence and integrity in the management consulting profession. In addition, Rick has spent over 18 years at Paradigm Consulting where he works with organizations in insurance, banking, healthcare, marketing and retail industries. He uses a facilitative approach to assist organizations prepare and implement the change necessary to achieve its strategic goals. Rick has been a member of the Business Architecture Guild since 2016 and is a Certified Business Architect, Certified Management Consultant and a Certified Business Analyst.

1:55 – 2:40 pm | Improving Customer Experience with Business Architecture

*Pritam Dey, Enterprise Solutions Architect, MedImpact*

*Ron Ballard, Solution Architect, MedImpact*

**Abstract:** The clients and members of a traditional healthcare organization have a frustrating experience with user interfaces and systems. Some clients terminate their relationship because the systems are not modern and user friendly while user interfaces lack a consistent language. Customer satisfaction is low. There is an urgent need to provide an exceptional customer experience through a modern, intuitive, guided user experience to regain client confidence and satisfaction. The company applied business architecture concepts to transform from inside-out to outside-in by organizing around an external view of its ecosystem, placing value delivery and a consistent customer experience at its center. Applying customer journey mapping and customer personas, along with the Business Architecture Guild's Healthcare Industry Reference Model, the company undertook a major rebranding of its products and services and even reorganized itself to better serve its customers and members. All user interfaces for clients, members and employees have been redesigned and rebranded to provide a unified, well-integrated and consistent customer experience. The result was a comprehensive vision of the end-to-end customer experience. In addition, underlying IT assets were transformed to reduce the complexity of the holistic user experience that brought all relevant business functions together seamlessly from the user perspective. The final result provided a one-stop shop for clients, members, and employees, delivering a superior digital customer experience, speed-to-market and operational efficiency.

**Bio:** Pritam Dey is a Certified Business Architect and a TOGAF-certified Enterprise Architect. He has an extensive background in developing and implementing business architecture frameworks and standards for internal and external clients, resulting in significant improvements to business efficiency and profitability. He also has experience serving in an advisory role to senior management, drawing upon business and technical knowledge to identify enterprise solutions (aligned to business objectives) that facilitate growth and minimize downtime. In his current role at MedImpact, he partners with business leaders to drive enterprise/business strategy, IT strategic elements supporting it, strategic planning and defining target architectures. A key aspect of this role is using business architecture framework to understand business drivers and business capabilities and determining corresponding enterprise system changes to drive the organization's targeted business outcomes. Pritam Dey holds an MBA from Carlson School of Management, University of Minnesota.

**Bio:** Ron Ballard is a TOGAF Certified Enterprise and Solution Architect in the health care industry. Ron is currently embarking on a modernization effort to create a composable and interoperable business capability-based enterprise application landscape within the organization. He is using enterprise and business architecture to define the organization's strategic goals and desired capabilities leading to creating an aligned target IT landscape and corresponding planning roadmaps at both an enterprise and detailed specific solutions levels.

2:40 – 3:00 pm | Break

### 3:00 – 3:45 pm | Technology Modernization Through Business Architecture

*Kishore Maranganti, AVP Portfolio Management, Humana*

*Daria Robinson, Associate Vice President, Enterprise Architecture, Humana*

**Abstract:** As Humana embarks on an audacious journey to modernize its technology ecosystem, its leaders face the daunting task of prioritizing investments that provide the most value to the organization. Key objectives include improving innovation, increasing agility, reducing technical debt, lowering cost and reducing technology complexity and related risks. Understanding and prioritizing value-driven investments requires the ability to view the organization's strategic priorities through a common lens to build a strong business case, which in turn requires a holistic understanding from a strategy, technology and cost perspective. Leaders needed a framework to deliver this shared understanding and turned to business architecture, which has the ability to shine a light on the critical capabilities that support Humana's strategic priorities. Capability classifications, such as strategic or tactical, externally or internally focused and business criticality helps leaders align proposed transformation and modernization investments. Business architecture has become a foundational part of Humana's technology investment planning and continuous modernization process. It allows Humana to paint a complete picture of its application portfolio to make modernization investments that provide strategic business value while reducing portfolio run costs.

**Bio:** Daria leads Humana's Enterprise Architecture Practices organization, where her team is responsible for creating standards, processes, and frameworks to ensure proper due diligence and transparency for broad-reaching architectural decisions. This responsibility includes forming a Business Architecture Practice which balances Business Strategy and Technology Modernization needs when creating Humana's Technology Strategy. Daria has spent the majority of her 20+ year career in various architecture roles, including Enterprise, Solution, and Application Architecture, spanning areas such as Clinical, Consumer Experience, Wellness, Identity, and Access Management,

Digital Channels, and Contact Center. Daria enjoys traveling abroad with her husband and two children (ages 6 & 8) outside of work.

**Bio:** Kishore Maranganti leads Humana's Modernization Program, where he and his team are responsible for the governance structure, process, investment needs, and resulting roadmaps for modernization. He has over 25 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 holds a Doctorate in Business Administration, a Master's Degree in Computer Science, and a Bachelor's of Engineering in Civil Engineering.

3:55 – 4:40 pm | How Cargill Uses Business Capability Assessments to Drive Strategy

*Linda Finley, Global Architecture Lead, Cargill*

*Vernon Smith, Founder and Chief Strategy Officer, UMT360*

**Abstract:** Cargill connects farmers with markets, customers with ingredients, and people and animals with the food they need to thrive, combining experience with new technologies and insights to serve as trusted partner for food, agriculture, financial and industrial customers in more than 125 countries. Due to the complexity of the business environment, Cargill requires business capability assessments at multiple levels, by function, enterprise, region, country, business group and individual business. These assessments record business capability maturity, notes and rationale, and current and future state performance values for people, process, data and technology. Some scores need to increase, while others need to decrease, where investments are always driven by where it makes good business sense. Assessment types include enterprise-wide assessment of critical and strategic capabilities, pre-deployment assessments to measure business readiness for ERP implementation and strategy assessments for critical services that identify gaps and opportunities for major initiatives. Cargill has developed highly consumable assessment dashboards to provide strong visual illustration of current and target maturity states, which often serve as input to the Cargill strategy document. Regularly performed assessments demonstrate how change occurs over time. This session will discuss the different ways Cargill performs and utilizes their assessments.

**Bio:** Linda brings experience as a leader, architect, community builder, consultant, practitioner, speaker and coach for the benefit of Cargill and the TCBAF Business Architecture Community. Linda's commitment to equipping these organizations and individuals for success and her effectiveness as a trusted adviser has enabled improvement, facilitated formation of strategy and guided desired transformation. Linda focuses on clarifying individual and organizational purpose as a critical starting point in maximizing the skills and talents individuals bring to organizations and designing business capabilities for extraordinary results. She is enthusiastically interested in the practice and performance of enterprise and business architecture to drive strategy, transformation and growth.

**Bio:** Vernon is a highly experienced Enterprise Architect, with full-lifecycle experience gained over 30 years. He has built and delivered entire architectural practices for major organizations and was responsible for creating the Architecture Profession at one of the world's largest global companies. He has established and implemented cultural change at the most fundamental level, changing the way that organizations think about their corporate information and driving transformation as a direct result. By bringing a business focus to Enterprise Architecture, Vernon is able to lead change in an

organization with his passionate and engaging approach that brings together management consulting and IT strategy in a way that shows true value and benefit to both.

**4:45 – 5:15 pm | Closing Remarks**

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

**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, delivering closing remarks and discuss where attendees can continue to engage in business architecture beyond the Summit. The session will take open questions and provide insights into other topics attendees may raise.