Business Architecture Innovation Summit – Day One
Tuesday, March 20, 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., President, Business Architecture Guild®, Partner, BAA
Co-Chair: Alex Randell, Assistant Director – Business Architecture, Principal, 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: William Ulrich is a management consultant, mentor, author and workshop leader. He is President of TSG, Inc., President and Cofounder 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)®.

Bio: Alex Randell is Assistant Director, Business Architecture at Principal. Alex leads the business architecture discipline in the translation of business strategy and capabilities, including the strategy-to-execution value stream, business/technology alignment, and strategic business transformations. Alex is a member of the Business Architecture Guild's Board of Directors and Editorial Board, with specific responsibilities as the BIZBOK® Guide Manager. He is also the founder of the Business Architecture Community group in Des Moines, Iowa and on the planning committee for the Twin Cities Business Architecture Forum. Alex has experience in marketing, analytics, and technology across diverse industries, holds an MBA with Marketing emphasis from the University of Iowa, and is a Certified Business Architect (CBA)®.

| 9:15 – 10:00 am | So You Have a Business Architecture Practice, Now What? |

Kelley Eckmayer, Business Architect, PNC Bank
Heather Gavlak, Business Architect, PNC Bank

Abstract: PNC has established a business architecture practice, including standard adoption of the BIZBOK® Guide. We will guide you through the next steps to mature your business architecture practice, including lessons learned. Our next steps in maturity include establishing governance, expanding potential usage, and providing guidance and value to leadership. We will briefly review how we established the business architecture practice at PNC and walk through each step in the maturity process as well as our future development plans.

Bio: Kelley Eckmayer is a business architect with over 15 years of proven track record as a value-adding, delivery-loaded project hardened professional. She has hands-on expertise spanning in business architecture, business analysis, system analysis, architecting financial applications, data warehousing, data migrations, data processing, and ERP applications. Kelley has worked as a business architect, business analyst and project manager and has maintained budgetary control over all projects within an organization and has been responsible for company resourcing. Kelley is TOGAF Certified, a Certified Business Analysis Professional (CBAP), and Six Sigma Black Belt.

Bio: Heather Gavlak is a business architect with a strong financial services background experienced in both line of business and enterprise architecture solutions. She has a proven ability to identify and execute scalable business solutions that support the long-terms strategies of the enterprise. Heather has experience in business analysis and process improvement in financial services and manufacturing. Heather is involved as a Board Member for Gift of Adoption Fund – Ohio; a national, non-profit focused on providing adoption assistance grants that give vulnerable children a permanent home and the chance to thrive.

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

| 10:30 – 11:15 am | The Role of Business Architecture in Digital Transformation at Traditional Banks – a Case Study of the Bank of Montreal |

Terrance Zhang, Senior Business Architect, Bank of Montreal

Abstract: The Bank of Montreal Digitization Program, one of the largest initiatives in the bank's 200 years of history, is in the second year of its journey with an ambitious goal of transforming the paper-heavy core banking processes for all of its line of businesses in a sustainable way. Business architecture plays a critical role in ensuring the reusability and scalability by – firstly, prioritizing the capabilities by relating them to the customer journeys and value streams to be transformed; secondly, mapping out the capability instances by relating them to all the line-of-business processes, and identifying common configurable items among instances that will drive reusability across the line of businesses; thirdly, decomposing the capabilities to a granular level that will drive the design of micro-services and APIs and their orchestration into reusable and configurable building blocks. The business architecture deliverables proved to be a visual catalyst for the design paradigm shift.

Bio: Terence Zhang is Lead Business Architect at Bank of Montreal (BMO) 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 Community in Greater Toronto Area.

11:15 am – noon	All Capabilities are Not Created Equal: How to Identify Value, Risk, and Opportunities

Stephen Clark, Business Architect, Asset Management PMO, Ameriprise Financial, Inc.

Abstract: Given globalization, industry consolidation, opportunistic acquisition priorities and regulatory pressures, financial services enterprise leaders are challenged by competing perspectives on how to prioritize investments, risk mitigation strategies, operational efficiency initiatives, and strategic change management efforts. Couple these complexities with knowledge gaps between leaders in need of accessible repositories of actionable business intelligence and the technically proficient experts able to configure, deploy and maintain such platforms, there are obvious questions about how to succeed implementing sustainable and scalable business architecture practices and platforms. This case study will highlight ways business unit and enterprise leaders can partner with business architects to implement 'middle-out,' decentralized business architecture practices without instituting enterprise-wide change management or organizational reengineering initiatives. As an exploration of 'Cross-Ecosystem Perspectives: Normalizing a Business Ecosystem,' this presentation will highlight findings and analysis of tool capabilities to raise questions about the merits of trying to 'normalize a business ecosystem'.

Bio: Stephen Clark has a 25-year professional history focused on global organizational design, change management, product design and program/portfolio delivery. He helps align technical investment opportunities with strategic business goals, objectives and tactical necessities across manufacturing, distribution, healthcare and financial services domains. A background in requirements engineering has been central to consultative and corporate successes. Lessons learned over the last ten years show benefits from comparing actual to aspirational use of best practice playbooks like *A Guide to the Business Architecture Book of Knowledge (BIZBOK® Guide)*. Recent experiences applying model-based business architecture techniques reveal relative value of iterative and agile scoping, estimation, and delivery approaches.

Noon – 1:00 pm	Lunch

1:00 – 1:45 pm	The 5S'ing of the Enterprise to "Surface the Problems": How to Leverage a Mature Lean Six Sigma Culture to Rapidly Drive Enterprise-wide Business Impact

Janice Lewis, Principal Engineer, General Dynamics, Electric Boat

Abstract: You've just been hired into a Lean Six Sigma Organization and tasked with starting a new enterprise architecture / business architecture practice to "stitch together" Lean Six Sigma improvements across the enterprise and further strengthen the culture and impact of Lean Six Sigma in the company. This presentation will outline the strategy for meeting this challenge at a defense company over the six month period leading up to this conference, with month by month snapshots of milestones and outcomes. Attendees will gain insights on rapidly forming an enterprise-wide business architecture discipline, building business architecture using the language and culture of Lean Six Sigma, and leveraging it to optimize and streamline operations and to drive strategic intent into business outcomes.

Bio: Janice Lewis is an Enterprise Architect specializing in business architecture. She works at General Dynamics, Electric Boat in Groton, CT, having recently started at the company in August 2017. Her objective is to build an enterprise architecture / business architecture practice to "stitch together" Lean Six Sigma improvements across the enterprise and further strengthen the culture and impact of Lean Six Sigma in the company. Prior to Electric Boat, Janice held similar architecture positions in pharmaceutical and defense companies. Janice is a Certified Business Architect (CBA)®.

1:45 – 2:30 pm	Using Business Architecture to Destroy a Complacent Culture

Kathleen Walsh, Enterprise Architect, Department of Defense
Radhika Patel, Enterprise Architect, Department of Defense

Abstract: Many organizations can become vulnerable if they stop creating, stop challenging the status quo, or stop striving to improve. This risk also translates to a government organization because many employees feel that not only is their job secure, but their mission is secure. The way to counteract complacency is with a sense of urgency. Initiatives need to be backed by a sense of purpose and strategy must connect to the operations. We were able to achieve this connection by using business architecture and this session will explore the case study on how we used business architecture artifacts, such as capability and organization maps in order to address organizational challenges.

Bio: Kathleen Walsh is an enterprise architect working on how the integration of strategic planning, systems engineering, and process development can be improved via the focused application of the business architecture discipline. Kathleen leads a cross-discipled team through the business architecture process and defines the business architecture practice at ARDEC.

BIO: Radhika Patel been trained in Model Based Systems Engineering and is using that knowledge to explore business architecture. Radhika is interested in bringing systems engineering rigor to ARDEC's business process model to map the key functions and interactions of the organization and is helping define the business architecture capability at ARDEC.

2:30 – 3:00 pm	Networking Break

3:00 – 4:15 pm	Business Architecture Practice and Journey Update at FedEx
3:00 – 3:40 pm	Knocking Down the Walls: Building an Effective Community of Practice

Anurag Pathak, Marketing Principal, FedEx

Abstract: How does one go about building a common business perspective for a large, complex, and global corporation? A community of practice is a key success factor for unleashing the power of business architecture. Through this presentation, we will discuss how to successfully stand up a cross-functional collaborative team with the aim of creating and applying the foundational building blocks of enterprise business architecture. We will highlight how we built the practice from scratch, secured support of top management to invest in the practice, and built and rallied a team around the common goal using agile methodology.

Bio: Anurag Pathak is a Marketing Principal and Certified Business Architect (CBA)® working for FedEx for the last 10 years. He is actively involved in leading the business architecture community of practice.

3:40 – 4:15 pm	A Journey to the Left: Moving from Execution to Strategy

Amit Khanna, Marketing Principal, FedEx

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: Amit Khanna is a Certified Business Architect (CBA)® working at FedEx in marketing. Amit has over 15 years of experience in marketing and strategy and is one of the founding business architecture team members at FedEx.

4:15 – 5:15 pm	Business Architecture Lightning Talks

Moderator: Mike Rosen, VP 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)®.

5:15 pm	Day 1 Wrap-up & Day 2 Preview

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

Abstract: The day 1 wrap-up will review what was covered throughout the day's sessions and look ahead to day 2 of the Summit.

Business Architecture Innovation Summit – Day Two
Wed. March 21, 2018

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

Co-Chair: William Ulrich, President, TSG, Inc. & 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.

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

Co-Chair: Alex Randell, Assistant Director – Business Architecture, Principal, Director Business Architecture Guild®

Abstract: This session will seek comments and questions regarding day 1 and provide an overview and highlights for day two.

9:00 – 10:15am	Autodesk: A Business Architecture Journey & Usage Scenario

9:00 – 9:40 am	Building a Cross-Functional Collaboration Muscle Using Business Architecture

Steven Scott, Autodesk, Senior Business Architect

Abstract: Autodesk's business transition to a subscription model requires a move from a product centric company to a customer centric company. This results in an unprecedented culture shift as alignment, collaboration, and coordination across business units becomes crucial to success. While Autodesk is still in the midst of the journey, a business architecture oriented approach has been key to success. This presentation will discuss creating a Center of Excellence of business architects to create, champion and drive standards that has become critical for building our cross-functional collaboration muscle and breaking

down organizational silos

Bio: Steve Scott has been driving critical business and system change on the forefront of Autodesk's business transformation for nearly 18 years. He has been one of the key champions, evangelists, and leaders of Autodesk's move to business architecture-driven planning.

9:40 – 10:15 am	Business Architecture & Customer Experience: Establishing an Aligned Perspective

Chris Coumbe, Autodesk, Senior Business Architect

Abstract: This presentation looks at the use of customer experience/service design techniques as a complement to business architecture. We will describe our application of these techniques to a value stream to drive a more complete design and help to identify priorities. We will look at the tangible and intangible benefits of this alignment and share some of the tools used.

Bio: Chris Coumbe has a background in Network Design, Service Management / ISO20000 consulting and Service Design. He became a convert to business architecture at the beginning of 2017 and is part of the initiative to implement and evangelize business architecture within Autodesk.

10:15 – 10:30 am	Morning Break
10:30 – 11:15 am	Leveraging Reference Models to Augment an Internal Capability Map

Terry Lowe, Strategic Consultant, Humana
Kishore Maranganthi, Manager of Group Business Architecture, Humana

Abstract: Without a mandate to develop an enterprise-wide capability map, our business architecture team developed a business-driven base capability map as a foundation across multiple engagements. Each engagement, in coordination with subject matter experts, yielded refinements that were carried forward. However, at the same time, other areas of the organization were performing "business architecture-like" activities with no alignment to business architecture standards. We found we lacked a "common vocabulary" as required by BIZBOK® Guide. Our business architecture team endeavored to reconcile multiple capability maps and pseudo capabilities propagated throughout Humana. We created a homegrown capability map, based on BIZBOK® guidelines, as our starting point. We leveraged the Guild's insurance industry reference model capability map as a basis for a common map, which served as a valuable tool to resolve differences and fill in gaps in our homegrown capability map. We are now well on our way to creating a common business vocabulary and expect to make further progress in 2018 thanks to the expanded capabilities included in the Guild's insurance industry and common reference model capability maps.

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, 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. Terry is a Certified Business Architect (CBA)®.

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 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.

11:15 am – Noon	How Business Architecture Enables Transparency and Alignment

Teresa Garcia, Business Architect, Wells Fargo Home Mortgage

Abstract: Organizations cannot align what they cannot see. Transparency and alignment to strategic objectives and goals are paramount to an organization's ability to achieve success. With so many ideas being generated in design thinking sessions, executive "Think Tanks", strategic planning, and other forums, organizations are racing to innovate and determine how to mature current capabilities and identify any new ones needed to transform their products and services. This environment makes it even more important to employ the business architecture discipline. By identifying capabilities, stakeholders, information, policies, etc. and the relationship between these abstractions you will foster collaboration on capabilities, stakeholder analysis, value streams and their value exchange among other things that will improve organizational alignment.

Bio: Teresa Garcia is a Certified Business Architect (CBA)® who is employing business architecture to synthesize design concepts, partnering with resources to define capabilities, value streams, information, etc., and collaborating to align business strategies and technical solutions. In Teresa's role, she focuses on digital capabilities and services to deliver an integrated, intuitive, and seamless customer experience. Business architecture reference models are industry-specific representations that allow businesses within a given industry to jump start business architecture articulation efforts while aligning to best practices. Reference models are maturing across a number of industries including financial services, insurance, manufacturing, healthcare, transportation and more. This panel discussion will overview reference models, usage scenarios, and the efforts to move these reference models forward.

Noon – 1:00 pm	Lunch

1:00 – 1:45 pm	Guerrilla Architecture

Kathryn McDonald, Architect, City of Edmonton

Abstract: Interested in learning how to demonstrate the value of business architecture? This session reviews five guerrilla tactics taken by the City of Edmonton to leverage opportunities to do just that by (1) legitimizing business architecture into the enterprise architecture plan; (2) leveraging a business reference model to develop the business architecture, (3) partnering with business analysis, (4) enhancing disaster recovery planning, and (5) engaging stakeholders.

Bio: Kathryn McDonald BSc CBA CBAP is has over 20 years of experience with business architecture, business analysis and leading strategic and transformational initiatives. She is a member of the City of Edmonton Enterprise Architecture team leading the business architecture plan and the EA engagement plan. She has extensive experience in both private and the public sector working in many industries including telecom, pension administration, distribution, transportation, construction and infrastructure and heavy equipment. Kathryn is a Certified Business Architect (CBA)®.

1:45 – 2:30 pm	An Initial Retrospective of VSP Global's Business Architecture Journey

Mike Mangelson, Business Architect, VSP
Eric Morgan, Business Architect, VSP

Abstract: Articulating business architecture value while establishing a business architecture practice is not as straightforward as we would think, or hope, it would be. As we begin our business architecture work at VSP Global, we have a unique confluence of situations where we are: 1) initiating a brand new practice from scratch, with a newly-minted business architect; 2) building an enterprise business architecture model that encompasses our four-industry ecosystem; and 3) leveraging multiple industry reference models as well as the common reference models. From the perspective of the "journey before destination", and in true agile fashion, join us in a public retrospective where we discuss what we have done and learned - our current work, environment, challenges, struggles; our current impediments; and what we're doing to get better.

Bio: Mike Mangelson has been involved in varying roles with each of VSP Global's five different companies over the past 18 years. Mike has been in the IT organization most of that time, focused on ways to drive initiatives based on business need. Mike is currently on the architecture team in a business architecture role. Mike is a Certified Business Architect (CBA)®, a member of the insurance reference model team and a co-lead on the common reference model team.

Bio: Eric Morgan has been with VSP Global and Vision Care for about six years, starting in IT as a systems analyst then moving over to the strategy office as a business architect. Eric's held business and technical leadership roles since 1985 in a variety of industries including agricultural accounting and manufacturing, federal and state agencies, financial services, telecommunications, and health care.

2:30 – 3:10 pm	Delivering a Business Architecture "Elevator Pitch"

Panel Chair: Lene Østerberg, Executive Advisor, Nordea

Abstract: Many practitioners are challenged to produce a 45 second explanation of the value of business architecture. What if you were in an elevator with a business executive and has just a few floors to communicate the value proposition? The panel chair will challenge attendees to do just that while sharing executive advisory experiences in communicating business architecture's value proposition to senior business executives.

BIO: Lene Østerberg is Executive advisor on transformation projects in Wealth management in Nordea and has previously worked as Chief Operating Officer at Nordea Life and Pension and Nordea Bank Capital Markets. Lene has primarily worked with combining the three disciplines of business analysis, business architecture and portfolio management for both internal projects as well as external stakeholder driven projects. She has driven and facilitated the business architecture methodology and implementation throughout wealth management and capital markets. She has played an important part in getting business architecture on the executive agenda in Nordea. It is her overall goal to have a very close cooperation between IT and Business in order to create the full business transformation.

3:10 – 3:30 pm	Networking Break

3:30 – 4:15 pm	Global Business Architecture: Key Perspectives

Steve DuPont, Associate Technical Fellow, Enterprise Architecture, The Boeing Company

Abstract: Business architects supporting an organization's global business development activities can be faced with significant demands for new skills. Based on experiences in supporting global business development activities, including recent deployments in China, this session will discuss key perspectives in global business architecture, including lessons learned, and practical advice for deploying business models across multiple contexts.

Bio: Steve DuPont is an Associate Technical Fellow and Enterprise Architect with The Boeing Company. He has over 30 years of experience in the aerospace industry, leading IT and business architecture development for engineering, manufacturing, sales and marketing domains. His mission is to advance the state of the practice of business architecture at Boeing and contribute to the body of knowledge and industry standards in this discipline. Steve's current interests include business design and global business architecture. Steve is a Certified Business Architect (CBA)®

4:15 – 5:00 pm	**Leveraging Business Architecture in Building the "City Plan" for the Insurance Company of the Future**

Vanessa Tafoya-Smith, VP, Brighthouse Financial
Tanushree Kumar, Manager, Financial Services Strategy & Architecture Practice, EY

Abstract:
Recently a new company was launched that would introduce a new innovative business model into the Life and Annuities domain. With approximately $220B in assets, this company would be faced with the challenge of operating independently of their parent company within 3 years. In order to operationalize their services in this short period of time, new business capabilities and processes needed to be defined to enable a new infrastructure, platform and applications to support this value proposition. Brighthouse Financial utilized the business architecture framework to drive the overall design of the future state platform, illustrate alignment with the business objectives, prioritize the capabilities that are needed to deliver stated value proposition, and define the technology implementation strategy.

Bio: Vanessa Tafoya-Smith is Vice President at Brighthouse Financial Transformation Management Office, where she drives organizational change in support of the Future State technology initiative. Vanessa is engaged in portfolio roadmap rationalization, SDLC framework management including detailed integrated planning for risk and dependency management, IT cost model projections and separation management. Prior to joining Brighthouse, Vanessa worked at MetLife where she led a team of Program / Project Managers and Business Analysts in cross functional initiatives.

Bio: Tanushree Kumar is a Manager in the Financial Services Strategy and Architecture practice at EY in the U.S. Tanu has over 8 years of experience in business architecture, process improvement, IT strategy, business transformation, IT due diligence, and program management.

5:00 – 5:!5 pm	**Closing Remarks / Adjourn**

William Ulrich, President, TSG, Inc., Director, Business Architecture Guild

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 workshop.

6:00 – 8:00 pm	**Networking at OMG Evening Reception**

November 29, 2017. Agenda and speakers subject to change with or without notice.