

# BUSINESS ARCHITECTURE PRACTITIONER & REFERENCE MODEL WORKSHOP

December 5 - 7, 2017  
9:00 am - 5:00 pm  
Burlingame, CA, USA



## Day 1 - Tuesday, December 5<sup>th</sup> – Business Architecture Healthcare

<b>8:40am - 8:50am</b>	<b>Welcome and Introductions</b>  Richard Soley, CEO, Object Management Group
<b>8:50am - 9:15am</b>	<b>Workshop Background, Objectives &amp; Overview</b>  Co-Chair: Whynde Kuehn, Director, Business Architecture Guild Co-Chair: William Ulrich, President, Business Architecture Guild
<b>09:15am - 10:00am</b>	<b>Healthcare Workshop: Agenda Review &amp; Logistics</b>  Session Chairs: Chalon Mullins, Matt Edwards This session will provide background on the reference model work done in the healthcare provider and insurance (payer) reference model teams, and how this work can be leveraged to provide an integrated healthcare delivery from a provider / payer perspective.
<b>10:00am - 10:20am</b>	<b>Morning Refreshment Break</b>
<b>10:20pm - Noon</b>	<b>Breakout Session – Ecosystem Alignment via Capabilities</b>  Breakout teams will identify and refine capabilities that represent an integrated perspective of the payer and provider sides of the healthcare industry. Each breakout team will work with a given capability or capabilities to focus on payer and provider views and determine best perspectives for leveraging these integrated perspectives for ecosystem alignment.
<b>Noon - 1:00pm</b>	<b>Lunch</b>  Breakout Session Topic
<b>1:00pm – 1:40pm</b>	<b>All Group Recap and Value Stream Walkthrough</b>  This session will review the morning's capability alignment work on integrated care delivery and gain feedback and identify follow-up activities based on results.
<b>1:40pm – 2:40pm</b>	<b>Breakout Session – Ecosystem Alignment via Value Streams</b>  Breakout teams will identify and refine value streams that represent an integrated perspective of the payer and provider sides of the healthcare industry. Each breakout team will work with a selected value stream to focus on payer and provider views and determine best perspectives for leveraging these integrated perspectives for ecosystem alignment.

**2:40pm - 3:00pm**

**Afternoon Refreshment Break**

**3:00 pm - 4:00 pm**

**Breakout Session – Ecosystem Alignment via Cross-Mapping**

Breakout teams will take their assigned value stream and selectively identify enabling capabilities and, where possible participating stakeholders. The teams will prepare their results for group review.

**4:00 pm - 5:15 pm**

**Mapping Results Walkthrough and Discussion**

Each breakout team will present and gain feedback on the afternoon's results. In addition, the workshop assembly will collectively identify action plans as to how to move these efforts forward post-workshop.

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## Day 2 - Wednesday, December 6<sup>th</sup> – Business Architecture Practice

8:45am - 9:15am	<b>Objectives &amp; Overview: Business Architecture Practice Workshop</b>	
<p><b>Co-Chair: Whynde Kuehn, Director, Business Architecture Guild</b>  <b>Co-Chair: William Ulrich, President, Business Architecture Guild</b></p>		
09:15am - 10:00am	<b>Workshop Day Agenda Review &amp; Logistics: Practice Foundations from the BIZBOK® Guide</b>	
<p><b>Session Chair: Alex Randell</b>          The business architecture end-to-end practice workshop will focus on formalizing the use of business architecture from strategy definition through solution deployment. This session will overview the evolving role of business architecture in the strategy-to-execution framework and the facilitated group brainstorm session around how to articulate the value proposition of business architecture within the context of an “elevator pitch.”</p>		
10:00am - 10:20am	<b>Morning Refreshment Break</b>	
10:20am - Noon	<b>Value Stage 1: Establish/Refine Business Strategy</b>	<b>Value Stage 2: Assess Business Impacts</b>
<p>These breakout sessions provide a deep dive into the business architecture value stream with a focus on the first two value stream stages: Establish/Refine Business Strategy and Assess Business Impacts. Participants will investigate each value stream stage including the value items delivered in each stage, participating stakeholders, and the overall value proposition. There will be a focus on evolving the tools and approach required for each stage. Ultimately, the value stream will be reconstructed to deliver business architecture’s value proposition. <i>(Choose one breakout session.)</i></p>		
Noon - 1:00pm	<b>Lunch</b>	
1:00pm - 3:00pm	<b>Value Stage 3: Architect Business Solution</b>	<b>Value Stage 4: Establish Initiative Plans</b>
<p>These breakout sessions will continue the deeper dive into the business architecture value stream with a focus on the third and fourth value stream stages: Architect Business Solution and Establish Initiative Plans. <i>(Choose one breakout session.)</i></p>		
3:00pm - 3:20pm	<b>Afternoon Refreshment Break</b>	

**3:20pm - 4:10pm**

**Value Stage 5: Deploy Solution**

This breakout session leverages all work to this point and focuses on the last value stream stage: Deploy Solution. This breakout session will also define the competencies a business architect must have to deliver the business architecture value proposition from strategy definition through solution deployment

**4:10pm - 5:15pm**

**Continuing the Momentum: Session Output Walkthrough and Next Steps**

This final session will compile all of the content and takeaways related to the business architecture value stream and the corresponding business architect competencies. Next steps will be discussed on how attendees can help to evolve and extend the business architecture value stream while putting it to use in their own practices.

**6:00pm - 8:00pm**

**OMG Evening Reception**

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## Day 3 - Thursday, December 7<sup>th</sup> – Business Architecture Financial Services

8:45am - 9:15am

**Objectives & Overview: Financial Services Advanced Reference Model Workshop**

**Co-Chair: Whynde Kuehn, Director, Business Architecture Guild**  
**Co-Chair: William Ulrich, President, Business Architecture Guild**

09:15am - 10:00am

**Workshop Day Agenda Review & Logistics**

**Session Chair: Ivan Blinov**

The business architecture financial services workshop will begin with an overview of the financial services reference model capabilities, value streams, organization, information, and stakeholders. This session will frame various breakout sessions framed by industry sectors such as retail banking, corporate banking, investment banking, wealth management, and others based on team options.

10:00am - 10:20am

**Morning Refreshment Break**

10:20am - Noon

**Review Strategic Goals and Objectives, Define Initiatives and KPIs**

This breakout session will engage teams to help define financial services related goals and objectives and focus on identifying candidate initiatives to support those goals and objectives. Each objective and initiative may include a mapping to KPIs that help measure success.

Noon - 1:00pm

**Lunch**

1:00pm - 2:40pm

**Mapping Initiatives to Capabilities and to Value Streams**

This breakout session will focus on leveraging the financial services industry capability map and value streams to help inform and interpret business objectives and initiatives. Leveraging financial services industry value streams helps identify the impacted value streams that are required to support each initiative and objective.

2:40pm - 3:00pm

**Afternoon Refreshment Break**

**3:00pm - 4:00pm**

**Prioritize Objectives and Initiatives to Create an Implementation Roadmap**

This breakout session will focus on reviewing objectives and initiatives using a cross-mapping values and capabilities to identify business values and draft a multi-year implementation roadmap to schedule and support a given organization strategic goals.

**4:00pm - 5:15pm**

**Mapping Results Walkthrough and Discussion**

Workshop breakout teams will leverage their team's work to discuss a draft roadmap for an organization's initiatives to support strategic goals and objectives. It is a great opportunity to illustrate the role of business architecture in the organization strategic planning to deliver the business value driven solutions.

**5:15 pm**

**Closing Remarks**

Overview of the next steps to incorporate the workshop results in the reference model for financial services industry and support the end to end organization strategic planning. Note the Guild's financial services group's enrollment is open for all workshop attendees.