

BUSINESS ARCHITECTURE PRACTITIONER & REFERENCE MODEL WORKSHOP

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



Day 3 - Thursday, December 7th – 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.