United Airlines: Business Architecture Practice & Approach to Strategic Initiatives
Why Business Architecture

Due to the growing complexity of business today, activities such as mergers and acquisitions, right sizing and regulatory compliance activities, organizations must find opportunities to become stronger, more efficient and effective.

Business Architecture helps by describing the key capabilities that bring value to the enterprise. The value comes from answering critical questions such as:

- What capabilities support our corporate strategies and objectives
- What roles and organizations enable those capabilities
- How will the business need to change in order to support the strategic direction

The answer to those and other questions enables the enterprise to re-use knowledge effectively and understand the critical integration points between capabilities and thus their supporting systems.
Business Architecture helps bridge the gap between Strategy and Execution, playing an important role in Strategic and Project Analysis.

**Strategic Planning**
- Understand Business Vision
- Define IT Goals
- Communicate IT Strategy
- Prioritize IT Portfolio
- Monitor & Adapt IT Strategy

**Enterprise Business Architecture**
- Connects United’s business strategies to enterprise capabilities
- Aligns project work to enterprise goals and strategies
- Conducts Impact/Gap Analysis (People, Process, Information, Metrics, Facilities)
- Creates roadmaps to bridge the gap to future state
- Establishes a common framework for business architecture development.

**Enterprise Application Architecture**
- Defines our technology strategy.
- Manages the technology governance process & the reference architecture.
- Defines roadmaps to bridge the gap to future state for technology capabilities.
- Facilitates development of architecture patterns and standards.
- Consults in design of multiple projects across multiple disciplines/domains.

**Project Execution**
- Initiation
- Analysis
- Design
- Code
- Test
- Deploy
- Closeout
Key to bridging this gap and answering the critical questions is the *Engagement Model*

**Engagement Model Points**
- Strategic Discussions with Business and during IT Strategic Planning Efforts
- Portfolio Program/Project Inception
- Program and Project Feasibility Phases focusing on those that introduce complexity and high degree of change

**Strategic Plan**
- Associate Business and to Level 2 capabilities provides holistic view and shared understanding of the impact
- Insight at business capability level to Opportunities/Risks
- Provides Common Business Architecture Framework aligning roles to processes to applications, systems and data flow

**Guidance/Governance**
- Govern - Enterprise Capability Model
- Govern - Current/Future state Process/Workflows
- Govern - Capability Associations representing current state
- Guidance - Impact Analysis regarding stakeholders, processes, and apps
- Guidance - High Level Scope Definition

**Programs/Projects**
- Alignment to Programs/Projects enables traceability to Enterprise goals and measurements
- Requirement acceleration
- Process Optimization integrated with systems and roles
- Identify Type and Degree of Change to Capabilities & Critical Workflows (Drives if further Engagement is needed)
- UAT scenario accelerations
- Provide context for benefit estimation/metric identification efforts

The Enterprise Capability Model provides a Common Framework and Understanding of Business Context.
Strategic Analysis assessed at Level 2 Capabilities provides the first view of impact

Enhance Day of Travel Experience via technology and self service

What roles and organizations enable those capabilities

Illustrative Purposes Only
Understanding of Business Context is Everything

- Need scope, PLUS how it fits into the organizational, technical, and business process context

- “Bottom up” approach assumes every process has a defined owner and no cross divisional requirements

- Organizing by division, project, or technology often results in unidentified dependencies

- Dividing work into projects without up-front analysis yields incomplete scope and missing stakeholders
This understanding of context supports identifying how the Business Capability will change to achieve desired Business Outcomes

Manage Customer Rebooking & Recovery

<table>
<thead>
<tr>
<th>Description</th>
<th>Passenger flight protection and accommodations (i.e. meal, hotel, ground transportation) caused by irregular operations; includes all channels and automation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roles</td>
<td>▪ Passenger, Agent, NOC, Contact Centers</td>
</tr>
<tr>
<td>KPI</td>
<td>▪ Customer Satisfaction, Self Service Metrics, Productivity</td>
</tr>
</tbody>
</table>
| Strategic Outcomes | ▪ Reduce airport staffing for delayed flights  
▪ Improve Customer Satisfaction with IRROP resolution time  
▪ Consistently provide preferred service to preferred customers |
| Strategic Activities | ▪ Shift workload from Agent Channels to Self-Service Channels  
▪ Simplify complex agent processes  
▪ Increased penetration of self service with customers  
▪ Expand automated and self service booking options to satisfy more customer’s needs  
▪ Apply Customer Information for IRROP prioritization (2013 Go Forward Plan) |
| Required Change | ▪ Redesign Service Center to increase self service usage  
▪ Expand available rebooking options to customers via self service  
▪ Enable customer amenities via self service (vouchers, compensation)  
▪ Robust Search for first available (by cabin rather than class, ..)  
▪ Leverage In-flight channels for customer notification  
▪ Wireless, touch screen capability to manage line waits  
▪ Consider customer value when prioritizing lines |

Illustrate the potential of change by conducting a gap analysis between as-is and to-be

How will the business need to change in order to support the strategic direction
Change includes opportunities: Addressing the Whole

- Plan projects and releases by looking at everything required to transform the capability
- Illustrate how the capability will evolve
- Identify interfaces and actively manage them
- Maintain traceability from objectives to requirements
Traceability of Objectives to Requirements

Objectives

- Consistently provide preferred service to preferred customers
- Improve Customer Satisfaction with IRROP resolution time
- Reduce airport staffing for delayed flights

Requirements

- Intelligent Queuing
- Expand Available Rebooking Options Via Self Service
# Gap Analysis Supports Integration of Systems and Project Specific Initiatives

## Gaps

12 gaps, which are defined as desired functionality not currently enabled by selected technologies.

Gaps will be prioritized and remediated.

## Accepted Differences

263 accepted differences which are defined as a difference where the current technology functionality is accepted

- 211 Accepted Differences
- 27 Accepted Differences – seen as Enhancements
- 25 Differences Under Review

## Other Organization Driven Decisions

49 other decisions, defined as functions enabled by Contact Centers, driven by needs of other organizations.

Decisions regarding these functions may increase Contact Center gaps or differences (e.g. Loyalty, HR Employee Travel, IT Security)

<table>
<thead>
<tr>
<th>Status*</th>
<th>Definition</th>
<th>Action to be Taken</th>
<th>Current Line Item Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gap</td>
<td>Does not exist in SCO and SUA process desired by business. Prioritized and estimation needed.</td>
<td>Prioritization by Workshop team</td>
<td>12</td>
</tr>
<tr>
<td>No Action Difference</td>
<td>Something done differently (between SCO and SUA) and SCO process accepted</td>
<td>None at this time. Training and communication will be needed for SUA.</td>
<td>211</td>
</tr>
<tr>
<td>No Action Difference - Enhancement</td>
<td>Something SUA benefits when SCO process is accepted</td>
<td>None at this time. Training and communication will be needed for SUA.</td>
<td>27</td>
</tr>
<tr>
<td>Difference Under Review</td>
<td>Something done differently between SCO and SUA. Decision pending or needed.</td>
<td>Research and decision by Workshop team</td>
<td>25</td>
</tr>
<tr>
<td>Other Org</td>
<td>Functionality need driven by another team</td>
<td>Team will address these with other orgs</td>
<td>49</td>
</tr>
</tbody>
</table>

*Status color coded for quick scanning
- Don’t assume everyone has a common understanding of our business
- Establish a shared language
- Acknowledge and accept the complexity and interconnectedness of business