BACKGROUND

- **Business Architecture Guild has found:**
  - People are able to understand how to put the techniques of business architecture together a meaningful way
  - There is an inconsistent approach across practices
  - Business architecture leaders and practitioners seek best practices for describing business architecture value

- **Progress to Date:**
  - Initial definition and first iteration of value stream
  - Stakeholder and value definition
  - Application in business architecture practices for strategic transformation and other change initiatives

- **Next Set of Work**
  - Validate current state and iterate as appropriate
  - Better practitioner guidance
  - Alignment and case studies of application to business scenarios
WORKSHOP OBJECTIVES

• Gain a deeper understand of the business architecture value proposition, value delivery, and underlying capabilities
• Contribute to further definition and knowledge related to the Business Architecture Value Stream
• Expand understanding of the activities, roles, and additional capabilities used in the value stream
• Increase the applicability and success of your business architecture practice
• Start or expand your role as a thought leader and contributor to the business architecture profession
• Network with fellow business architects
• Share best and avoid ineffective practices in applying business architecture
PRE- / POST-WORKSHOP ACTIVITIES

• Pre-workshop
  ▪ Review Part 1 and Appendix B.1
  ▪ Attend Business Architecture End-to-End Journey webinar

• Work today can be applied to:
  ▪ Future iterations of the BIZBOK® Guide
  ▪ Your internal business architecture practices
  ▪ Webinar and event materials
  ▪ White papers and other industry reference materials
## WORKSHOP AGENDA

<table>
<thead>
<tr>
<th>Time</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:45-9:15 am</td>
<td>Overview &amp; Objectives</td>
</tr>
<tr>
<td>9:15-10 am</td>
<td>Practice Foundations from the BIZBOK® Guide</td>
</tr>
<tr>
<td>10-10:20 am</td>
<td>Break</td>
</tr>
<tr>
<td>10:20 am – noon</td>
<td>Value Stage 1: Establish/Refine Business Strategy</td>
</tr>
<tr>
<td></td>
<td>Value Stage 2: Assess Business Impacts</td>
</tr>
<tr>
<td>Noon – 1 pm</td>
<td>Lunch</td>
</tr>
<tr>
<td>1 pm – 3 pm</td>
<td>Value Stage 3: Architect Business Solution</td>
</tr>
<tr>
<td></td>
<td>Value Stage 4: Establish Initiative Plans</td>
</tr>
<tr>
<td>3 - 3:20 pm</td>
<td>Break</td>
</tr>
<tr>
<td>3:20 – 4:10 pm</td>
<td>Value Stage 5: Deploy Solution</td>
</tr>
<tr>
<td>4:10 – 5:15 pm</td>
<td>Continuing the Momentum: Session Output and Next Steps</td>
</tr>
</tbody>
</table>
PRACTICE FOUNDATIONS FROM THE BIZBOK® GUIDE
The business architecture value stream:

- Represents how strategy is executed
- Is triggered when a stakeholder triggers the need for a business architecture-assisted solution
- Is supported by a series of capabilities that identify what is done at each stage to achieve stakeholder value
- See BIZBOK® Guide Appendix B.1 for definitions
ANATOMY OF A VALUE STREAM

**Value Proposition:**
“An innovation, service, or feature intended to make a company, **product, or service** attractive to **customers or related stakeholders**.”

**Triggering Stakeholder:** A category of individual or organization that initiates a value stream for purposes of achieving a stated value proposition.

**Participating Stakeholder:** A category of individual or organization that has a defined role or responsibility within a value stream stage and contributes to capability outcomes associated with that value stream stage.

**Value Item:**
“The judgment of worth, made by an individual or organization, attached to something tangible or intangible and attained in the course of a particular interaction with one or more other parties”.
ANATOMY OF A VALUE STREAM STAGE

Value Stream Stage: Deploy Solution

- **Value Stream Stage Definition:** Manage solution development, deployment, transformation, and success determination
- **Entrance Criteria:** Availability of defined, prioritized, and funded business initiatives
- **Exit Criteria:** Successfully deployed solution
- **Stakeholders:** Business Architect, Business Analyst, Business SME, Solution Architect, Portfolio Manager, Program/Project Manager, Developer/Engineer
- **Value Item:** Desired solution delivered

<table>
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<tr>
<th>Capability</th>
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<td>Deployment Team Engagement</td>
<td>Ability to identify, assemble, engage, manage, and coordinate implementation teams for the purpose of successful deliverable deployment required to realize benefits outlined in the tradeoff/decision criteria</td>
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<td>Deliverable Deployment</td>
<td>Ability to implement a particular deliverable or series of deliverables associated with a specific solution which may or may not include new organizational changes, business design concepts, third-party involvements, and/or IT options</td>
</tr>
<tr>
<td>Current State / Target State Transformation Management</td>
<td>Ability to transition from the current state environment to the target state environment while minimizing disruption and maximizing value</td>
</tr>
<tr>
<td>Success Evaluation</td>
<td>Ability to evaluate the success of a particular deliverable deployment</td>
</tr>
</tbody>
</table>
WHY DO WE NEED AN “ELEVATOR PITCH”? 

What are some of the common questions you hear about business architecture or your role as a business architect? *(Don’t overthink these…)*
CRAFTING THE ELEVATOR PITCH

Think
What are your answers to those questions

Pair / Group
Discuss and consider others’ answers

Share
How do we refine an elevator pitch to become a value proposition
• After the break, we will split into two groups (team up within groups as you wish)
  ▪ One will focus on “Establish/Refine Business Strategy”;
  ▪ The other will focus on “Assess Business Impacts”

• Your objectives: (Hint: Reference Appendix B.1 as a starting point)
  ▪ Discuss value stage and capabilities
  ▪ Document scenario using the Loan Company case study used throughout the BIZBOK® Guide
  ▪ Formalize example capability output for each capability
  ▪ Highlight any missing capabilities or other elements of the business architecture

• Prepare and present written narrative of how this stage was used in the scenario, the value and outcomes, and the overall value item resulting from this stage.
MORNING BREAK
### SCENARIO WALK THROUGH

**“We need to implement an augmented reality storefront!!!”** – Our Fictional CEO

| Establish / Refine Business Strategy | “Creating a storefront” is not a strategy  
<table>
<thead>
<tr>
<th></th>
<th>Increase online market share 10% and have a top-rated customer experience is.</th>
</tr>
</thead>
</table>
| Assess Business Impacts              | Does this require new or expanded capabilities? (Yes)  
|                                      | What business units? Information? Value streams? Technology? |
| Architect Business Solution          | What options do we have for the target state?  
|                                      | How are we going to implement case management for this channel? |
| Establish Initiative Plans           | So first we need to... and next we need to...  
|                                      | And do them concurrently and faster than ever! |
| Deploy Solution                      | If done right, our solution aligns to the business strategy  
|                                      | And, impacts the metrics so that we can judge whether we achieved our strategy |
BREAKOUT: VALUE STAGE 1
DEEPER DIVE: ESTABLISH/REFINE BUSINESS STRATEGY

- Helps business leaders articulate their strategies
  - When CEOs Talk Strategy, 70% Of The Company Doesn't Get It - Forbes

- Ensures strategies are actionable and relates to measurable objectives
  - 70% of employees say alignment is the greatest hurdle to achieving company strategy - Harvard Business Review

- Analyzes elements of strategy to set high-level priorities
  - Only 13% of company’s successfully execute their strategy – Daniel Prosser

- Helps communicate and reinforce strategy
  - Only 14% of employees understand their company’s strategy and direction – William Schiemann
### SCENARIO: ASSESS BUSINESS IMPACTS

<table>
<thead>
<tr>
<th>Stakeholders (Let’s bold the triggering stakeholder)</th>
<th>C-Level Executive, Business Planner, Business SME, Business Architect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenario</td>
<td></td>
</tr>
</tbody>
</table>
DEFINITION, ETC.: ESTABLISH/REFINE BUSINESS STRATEGY

- **Value Stream Stage Definition**: Formalizes business objectives and related action items, refines business strategy, and disseminates business strategy
- **Entrance Criteria**: Need to establish or refine strategy in relation to one or more business issues
- **Exit Criteria**: Prioritized set of objectives in relation to an overall business strategy
- **Stakeholders**: C-Level Executive, Business Planner, Business SME, Business Architect
- **Value Item**: Defined Strategy with Measurable Objectives
### CAPABILITIES: ESTABLISH/REFINE BUSINESS STRATEGY

<table>
<thead>
<tr>
<th>Capability</th>
<th>Capability Definition</th>
<th>Capability Outcome</th>
<th>BIZBOK® Guide Section Alignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy Definition</td>
<td>Ability to identify and articulate what the business wishes to gain or achieve in clear, concise terms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Performance Assessment</td>
<td>Ability to examine and incorporate effectiveness (heat map), impact, and related performance metrics into strategic planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objective Definition</td>
<td>Ability to articulate a quantitative, measurable result that defines strategy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action Item Definition</td>
<td>Ability to articulate a specific course to be taken to achieve an objective</td>
<td></td>
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</tr>
</tbody>
</table>
### CAPABILITIES: ESTABLISH/REFINE BUSINESS STRATEGY (CONT.)

<table>
<thead>
<tr>
<th>Capability</th>
<th>Capability Definition</th>
<th>Capability Outcome</th>
<th>BIZBOK® Guide Section Alignment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Objective / Action Item Matching</strong></td>
<td>Ability to ensure that quantifiable, measurable results are associated with actions needed to achieve those results</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Objective Tradeoff Analysis</strong></td>
<td>Ability to analyze the pros and cons of what a business wants to achieve based on limited resources (time, people, and money) and establish clear priorities of one option over another</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Objective Prioritization</strong></td>
<td>Ability to prioritize a set of related business objectives in context of an overall strategy</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Strategy Dissemination</strong></td>
<td>Ability to communicate strategy to the appropriate stakeholder</td>
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</tbody>
</table>
CREATE NARRATIVE: ESTABLISH/REFINE BUSINESS STRATEGY

<Write Narrative Here>
BREAKOUT: VALUE STAGE 2
DEEPER DIVE: ASSESS BUSINESS IMPACTS

- Business scenarios are created and applied
  - It’s an uncertain world; you can’t predict the outcome of your strategy

- Furthers the business architecture assessment
  - Use established elements and cross-mappings to set the foundation for transformation

- Aligns IT architecture to business architecture
  - Develop a true enterprise architecture picture, which often lacks the business perspective

- Impact analysis of the strategy
  - Why this strategy? Why now? What is important to know
**Value Stream Stage Definition**: Based on the objectives identified in the prior stage, perform an objective-driven business impact analysis using the business architecture as a frame of reference.

**Entrance Criteria**: Prioritized set of business objectives in relation to an overall business strategy and related tradeoffs.

**Exit Criteria**: All business architecture impacts for all business objectives identified.

**Stakeholders**: Strategic Planner, Business Architect, Business SME, Solution Architect.

**Value Item**: Business Objective Impact Analysis Through Business Architecture Lens.
## CAPABILITIES: ASSESS BUSINESS IMPACTS

<table>
<thead>
<tr>
<th>Capability</th>
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<th>Capability Outcome</th>
<th>BIZBOK® Guide Section Alignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Scenario Definition</td>
<td>Ability to interpret business needs and derive a postulated sequence of events that can frame assessment efforts and a related analysis plan</td>
<td></td>
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</tr>
<tr>
<td>Business Objective / Value Stream Impact Analysis</td>
<td>Ability to determine the impact of various business objectives on value streams and value stream stages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Objective / Capability Impact Analysis</td>
<td>Ability to determine the impact of various business objectives on business capabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Objective / Information Impact Analysis</td>
<td>Ability to determine the impact of various business objectives on business information concepts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Objectives / Business Unit Impact Analysis</td>
<td>Ability to determine the impact of various business objectives on business units and third parties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capability</td>
<td>Capability Definition</td>
<td>Capability Outcome</td>
<td>BIZBOK® Guide Section</td>
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<tr>
<td>----------------------------------</td>
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</tr>
<tr>
<td>Business Objective / Product Impact Analysis</td>
<td>Ability to determine the impact of various business objectives on formal product and service offerings</td>
<td></td>
<td>Alignment</td>
</tr>
<tr>
<td>Business Architecture / IT Architecture Impact Analysis</td>
<td>Ability to assess scenario impacts on IT application and data architectures through value stream, capability, information, and business unit perspectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action Item Definition</td>
<td>Ability to refine previously defined action items based on business and IT architecture impacts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current State Architecture Visualization</td>
<td>Ability to depict the current state environment and the aggregate impact of objectives and action items on business architecture and IT architecture</td>
<td></td>
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</tr>
</tbody>
</table>
CREATE NARRATIVE: ASSESS BUSINESS IMPACTS

<Write Narrative Here>
LUNCH
BREAKOUT: VALUE STAGE 3
• Create target state; or target states
• Alignment to other disciplines and approaches, such as case management, business process, IT architecture, and requirements analysis
• Different between current and target states becomes the gaps that must be prioritized in the next step
• Architecting the business is about how we design the business for its future; internally/externally, strategically, and with a customer focus

Answer the question: “How do we think our world, our business, and our customers’ experience will be different in the future?”
Value Stream Stage Definition: Leverage business architecture and related business analysis and design disciplines to develop a business solution that can address priority business objectives.

Entrance Criteria: Impact analysis of business objectives on business architecture and IT architecture.

Exit Criteria: Defined business design solutions and a recommended approach to deploying and transitioning to those design solutions.


Value Item: Defined Business Solution to Meet Business Objectives.
### CAPABILITIES: ARCHITECT BUSINESS SOLUTION

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Target State Architecture Visualization</td>
<td>Ability to depict the target state business and IT architecture as it has been designed to address the defined objectives and action items</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Architecture / Case Management Design</td>
<td>Ability to build business architecture influenced design solutions for coordinating work by organizing all relevant pieces into one place</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Architecture / Business Process Design</td>
<td>Ability to build business architecture influenced design solutions that leverage business process analysis and design techniques</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business-Driven IT Architecture Definition</td>
<td>Ability to leverage business architecture to influence and refine target state data, application, and solution architectures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current State / Target State Transformation Analysis</td>
<td>Ability to determine the delta between existing and envisioned architecture and design and then understand and assess the difficulties in making the transition from old to new</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target State Option Analysis &amp; Finalization</td>
<td>Ability to develop various target state solution options for meeting priority business objectives</td>
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</tr>
</tbody>
</table>
CREATE NARRATIVE: ARCHITECT BUSINESS SOLUTION

<Write Narrative Here>
DEEPER DIVE: ESTABLISH INITIATIVE PLANS

- Roadmapping, not project management
- Help executives and business leaders guide teams down the path of a solution
- How do we make the decision of what initiative to do when

- This is qualitative and quantitative, don’t shortcut with simple formulas
- When prioritizing, think about what really matters to drive your business
DEFINITION, ETC.: ESTABLISH INITIATIVE PLANS

- **Value Stream Stage Definition:** Establishes and prioritizes initiatives and related investments required to achieve business objectives

- **Entrance Criteria:** Availability of business and IT architecture impacts, design solutions, and transformation approach

- **Exit Criteria:** Availability of defined, prioritized, and funded business initiatives and cross-initiative impacts

- **Stakeholders:** Strategic Planner, Business Architect, Business SME, Solution Architect, Portfolio Manager

- **Value Item:** Identified Initiatives and Related Investments Coupled into an Overall Plan
### CAPABILITIES: ESTABLISH INITIATIVE PLANS

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<tr>
<td>Initiative Definition</td>
<td>Ability to identify and define programs and projects that can be used to address priority business objectives, framed within a business architecture context</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actionable Objectives / Initiative Mapping</td>
<td>Ability to map initiatives to identified objectives (either strategic or tactical)</td>
<td></td>
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</tr>
<tr>
<td>Initiative Measurement Criteria Creation</td>
<td>Ability to identify measurement criteria for each potential initiative or opportunity</td>
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<tr>
<td>Initiative Tradeoff / Decision Definition</td>
<td>Ability to develop tradeoff/decision criteria and cost/benefit analysis as a basis for determining which initiatives are best suited to achieve the business objectives in a timely, effective manner</td>
<td></td>
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</tr>
<tr>
<td>Initiative Mapping</td>
<td>Ability to analyze cross-impacts of planned and inflight programs and projects based on common impacts across capabilities and value streams</td>
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</tr>
</tbody>
</table>
CREATE NARRATIVE: ESTABLISH INITIATIVE PLANS

<Write Narrative Here>
AFTERNOON BREAK
COMBINED GROUP: VALUE STAGE 5
Putting it all together: blueprints, scenarios, and the knowledge base

Help team members with successful implementation

Continue as a strategic consultant

Help leaders gauge success

Evaluating success is a scary thing; we don’t like to be measured

This is about business outcomes; not individual or team performance
DEFINITION, ETC.: DEPLOY SOLUTION

- **Value Stream Stage Definition:** Manage solution development, deployment, transformation, and success determination
- **Entrance Criteria:** Availability of defined, prioritized, and funded business initiatives
- **Exit Criteria:** Successfully deployed solution
- **Stakeholders:** Business Architect, Business Analyst, Business SME, Solution Architect, Portfolio Manager, Program/Project Manager, Developer/Engineer
- **Value Item:** Desired solution delivered
## CAPABILITIES: DEPLOY SOLUTION

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CREATE NARRATIVE: DEPLOY SOLUTION

<Write Narrative Here>
CONTINUING THE MOMENTUM

Session Output Walkthrough and Next Steps
NEXT STEPS

• **Within Your Organization**
  • Position your business architecture team between strategy and execution; you may need to “shift left” over time
  • Create an engagement model for the business architecture team (see Section 3.2)
  • Ensure business architect roles and competencies can cover all stages of the value stream for applicable business scenarios

• **Getting Involved With the Guild**
  • Help mobilize and participate in a collaborative team focused on the business architect role, competencies and career path
    ▪ Vote and volunteer for the collaborative team (comment on post in the Staging Area)
PUTTING IT ALL TOGETHER: THE END-TO-END PRACTICE JOURNEY

November 15, 2017

Whynde Kuehn and Alex Randell

whynde.kuehn@s2etransformation.com
arand21@gmail.com
Assumes a business architecture knowledgebase is in place

- Minimum baseline includes capability map (ideally down to level 3, but can be level 1s with selected level 2s or 3s), key values streams (e.g. customer facing) and the cross-mapping between the two

- The rest of the business architecture knowledgebase may be created opportunistically based on scenario

Business Architecture Scenarios may apply across the value stream or to certain stages

- Some stages emphasize different business architect competencies

The business architecture team works with many others across the value stream

- It is a best practice to create an engagement model to define this

**SCENARIOS FROM BIZBOK® GUIDE PART 4**

- Digital Transformation
- Investment Analysis
- Shift to Customer Centric Business Model
- Merger & Acquisition Analysis
- New Product/Service Rollout
- Globalization
- Business Capability Outsourcing
- Supply Chain Streamlining
- Divestiture
- Regulatory Compliance
- Change Management
- Operational Cost Reduction
- Joint Venture Deployment
BUSINESS ARCHITECTURE MAPPING ACROSS THE VALUE STREAM

- Strategy Mapping
- Product Mapping
- Initiative Mapping
- Policy Mapping
- Metrics and Business Performance Management

Steps:
1. Establish / Refine Business Strategy
2. Assess Business Impacts
3. Architect Business Solution
4. Establish Initiative Plans
5. Deploy Solution

Business Performance Management
Note: All potential teams are not shown. The most key interaction points are shown, even though there may be others.
COMPETENCY EMPHASIS ACROSS THE VALUE STREAM

Establish / Refine Business Strategy
- Strategic Thinking, Strategy Formulation

Assess Business Impacts
- Architecture Analysis

Architect Business Solution
- Analytical Thinking, Problem Solving, Architecting, Communication, Influence

Establish Initiative Plans
- Business Case Development, Planning, Estimating

Deploy Solution
- Solution Development, Methodology Awareness

COMPETENCY PALETTE FROM BIZBOK® GUIDE APPENDIX B.2
- Analytical thinking
- Architecture development
- Business and technology alignment
- Business case development
- Business case development awareness
- Business modeling
- Capability assessments
- Change design and delivery methods
- Commercial and financial awareness
- Communication (written and verbal)
- Cultural awareness
- Customer service
- Design thinking
- Estimating techniques
- Framework development
- Gap analysis
- Influencing and persuading
- Investment planning
- Planning and organizing
- Planning, tactical and strategic
- Presentation and story-telling
- Problem solving
- Problem solving methods and tools
- Project management and development methodology awareness
- Project shaping and scoping
- Relationship building and diplomacy
- Resource planning
- Results orientation
- Risk management
- Simplifying complex concepts
- Strategic thinking (big picture awareness)
- Team work