WORKSHOP OBJECTIVES

• Gain hands on experience in business architecture
• Learn about value stream, capability and information mapping
• Engage in selected industry sector mapping activities
<table>
<thead>
<tr>
<th>Time</th>
<th>Workshop Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:45 am</td>
<td>Reference Model Workshop Background, Overview &amp; Purpose</td>
</tr>
<tr>
<td>9:00 am</td>
<td>Reference Model Industry Update, Mapping Approach, Workshop Logistics</td>
</tr>
<tr>
<td>10:00 am</td>
<td>Break</td>
</tr>
<tr>
<td>10:20 am</td>
<td>Value Stream Mapping: Buildout &amp; Review</td>
</tr>
<tr>
<td>Noon</td>
<td>Lunch</td>
</tr>
<tr>
<td>1:00 pm</td>
<td>Capability Mapping: Buildout &amp; Review</td>
</tr>
<tr>
<td>2:50 pm</td>
<td>Break</td>
</tr>
<tr>
<td>3:10 pm</td>
<td>Information Mapping: Buildout &amp; Review</td>
</tr>
<tr>
<td>4:30 pm</td>
<td>General Discussion &amp; Lessons Learned</td>
</tr>
<tr>
<td>5:00 pm</td>
<td>Wrap-up: Engaging in Reference Model Work Post-Workshop</td>
</tr>
</tbody>
</table>
WHAT IS A BUSINESS ARCHITECTURE, INDUSTRY REFERENCE MODEL?

• Why industry reference models?
  • Establish a principle-based, best practice-driven business architecture orientation for a given industry
  • Help jump start a company beginning a business architecture mapping effort or retrofitting existing model
  • Transfer knowledge as to what constitutes a robust, principle-based business architecture reference model

• What form do they take?
  • Packaged in standard BIZBOK® template format
  • BIZBOK® Guide summary level representations in Part 8
  • Downloadable content shared in populated templates
  • Content is maintained in tools by various teams

• Long-term goal
  • Ensure consistency across industry sectors in relation to terminology, common capabilities and value streams, decomposition structure for certain capabilities
  • Deliver a plug-and-play set of reference model components that would enable organizations with hybrid business models to construct a reference model
BUSINESS ARCHITECTURE GUILD REFERENCE MODELS AVAILABLE IN SEVERAL CATEGORIES

- Insurance Industry
- Financial Services Industry
- Healthcare (Provider) Industry
- Manufacturing Industry
- Transportation Industry
- Government – workshop focus
- Common Reference Model
  - Incorporates strategic and supporting capabilities common across industry verticals
  - Incorporates value streams not specifically linked to a single industry sector
Comprehensive representation of business ecosystem, regardless of industry sector

Comprehensive, transparent view of the business ecosystem

Business Architecture

- Stakeholders
- Strategies
- Capabilities
- Information
-组织
- Value Streams
- Initiatives
- Policies
- Products
- Metrics

BUSINESS ARCHITECTURE CORE DOMAIN
RELATIONSHIP SUMMARY

Value Stream Delivers Value Proposition
Value Stream Breaks Down into Stages
Value Item(s) Delivers Value Item(s)
Value Stream Stage Delivers Value Stream Stage
Value Item(s) Contribute to Value Item(s)
Outcome Produces Outcome
Capability Produces Capability
Value Stream Stage Based On Information
Capability Requires, Modifies Information
Business Unit Has Business Object

Business Unit
Business Object
Information
Defining value stream in business architecture context

- **Value Stream**: “An end-to-end collection of activities that create a result for a customer, who may be the ultimate customer or an internal end-user of the value stream”*

- The value stream has a clear goal: to satisfy or to delight the customer**

- When we say value chain, we mean the Porter “value chain”***

- Value streams in this context are not Lean Six Sigma or “lean value streams”, nor do we mean agile value streams

**Capability vs. Value Stream:**

- Capability views a business “at rest”, value stream views a business “in motion”

---


** As cited in “The Great Transition”, by James Martin, 1995

*** Competitive Advantage, Michael Porter, 1985
Value streams represent non-linear, incremental value accrual for a stakeholder or stakeholders until the end-state value proposition is achieved.

Value

• “The benefit that is derived by an organization’s stakeholder while interacting with that organization”*

Value proposition

• “An innovation, service, or feature intended to make a company, product, or service attractive to customers or related stakeholders”*

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”*

Value aggregation is focused on achieving the value proposition with no regard to the pathway towards achieving that value proposition.

*Source: BIZBOK® Guide Glossary, Business Architecture Guild
Value stream is “an end-to-end view of how value is achieved for a given stakeholder”

- Stakeholders may be external, such as a customer taking a trip on an airline:

  ![Customer Diagram]

- Or stakeholders may be internal, such as a scheduler initiating a plane to fly to a destination:

  ![Pilot Diagram]

- Value streams strive to achieve value proposition stated in its name for the “triggering” stakeholder

  *Above two value streams are unique and independent of one another*

Source: BIZBOK® Guide, Business Architecture Guild
ANATOMY OF A VALUE STREAM

Value Stream Name, Definition & Value Proposition

Settle Claim

Value Stream Stage Name, Definition, Entrance Criteria, Exit Criteria, Participating Stakeholders and Value Item

Value Proposition

Claimant Made Whole

Value Stream Triggering Stakeholder(s)

Source: BIZBOK® Guide, Business Architecture Guild
VALUE STREAM MAPPING TEMPLATE: FACILITATES VALUE STREAM ARTICULATION

<table>
<thead>
<tr>
<th>Value Stream</th>
<th>Value Stream Stage</th>
<th>Description</th>
<th>Value Proposition</th>
<th>Entrance Criteria</th>
<th>Exit Criteria</th>
<th>Value Item</th>
<th>Stakeholder(s)</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

Templates enable mapping teams to articulate a value stream and related stages.

In this template, value stream is listed on first row, with value stream stages listed below.

Where information is not applicable, it is blocked out.

For example, value streams have value propositions but not value items, and vice versa.

Stakeholder column represents triggering stakeholder(s) for the value stream and participating stakeholders for value stream stages.

Source: BIZBOK® Guide, Business Architecture Guild
<table>
<thead>
<tr>
<th>Value Stream Stage</th>
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<th>Exit Criteria</th>
<th>Value Item</th>
<th>Stakeholder(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish Financial Account</td>
<td>The end-to-end perspectives involved in establishing a customer account</td>
<td>Financial Account Established</td>
<td></td>
<td></td>
<td></td>
<td>Customer</td>
</tr>
<tr>
<td>Receive Application</td>
<td>The act of receiving an application for a new customer account</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Customer, Help Desk</td>
</tr>
<tr>
<td>Validate Application</td>
<td>Verification that the individual establishing the account is qualified to have an account</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Customer, Reviewer</td>
</tr>
<tr>
<td>Activate Financial Account</td>
<td>The activation of an account for a fixed period of time</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Customer, Approver</td>
</tr>
<tr>
<td>Notify Customer</td>
<td>The act of notifying the individual applying for an account that the account has been established or denied</td>
<td>Activated Account All Parties Notified Customer Notification Received</td>
<td></td>
<td></td>
<td></td>
<td>Customer, Approver</td>
</tr>
</tbody>
</table>

Source: BIZBOK® Guide, Business Architecture Guild
COMMON REFERENCE MODEL VALUE STREAMS – MAY BE INCORPORATED INTO ANY REFERENCE MODEL

Source: BIZBOK® Guide, Business Architecture Guild
CAPABILITY MAPPING SUMMARY OF PRINCIPLES

- Capabilities define *what*, not *how*
- Capabilities represent unique, non-redundant views of the business
- Capabilities are not defined haphazardly or on demand by a given program or business unit, but are foundational and persisted across programs, projects and organization changes
- Capability maps only contain capabilities
- Every capability has a definition
- A business will have one capability map for its business ecosystem
- **Capabilities are based on business objects** that create concise, unambiguous, and clearly delineated business perspectives – all child capabilities are bounded by the parent object
- Capabilities live within the context of an overall business architecture with relationships to value streams, information, organization, products, policies and initiatives

*Source: BIZBOK® Guide, Business Architecture Guild*
Business object: Abstract representation of a concrete actor within the business, either tangible or intangible

1. Identify and name the universe of objects – for example:
   - Customer, Product, Partner, Agreement, Decision, Facility, Asset, Channel, Human Resource, Policy, Brand, etc.

2. Apply action verbs against those objects – for example:
   - Customer Management, Product Management, Agreement Management, Brand Management, etc.

3. Decompose the actions performed to the degree of granularity required
   - Agreement Structuring, Agreement Valuation, Agreement Risk Management, Agreement Access Management, etc.

4. Define the capability by defining the object and verb action applied to the object – for example:
   - Customer Management: Ability to establish, predict, analyze, organize, present, and constrain information, preferences, experiences, and history related to an individual or legal entity that has, plans to have, or has had an agreement with the organization, or is otherwise a recipient or beneficiary of the organization's products and services.

5. Rationalize and Segregate – Repeat until map reaches maturity
A REVIEW OF CAPABILITY MAP BASICS – STRATIFICATION STRUCTURE

**Source:** Business Architecture Associates, Inc.
A REVIEW OF CAPABILITY MAP BASICS – LEVELING STRUCTURE

LEVEL 1

STRATEGIC CAPABILITIES
- PLAN MGMT
  - Plan Optimization
  - Plan Definition
  - Plan Dissemination
  - Plan Validation

INVESTMENT MGMT
- Investment Identification
- Investment Portfolio Mgmt
- Investment Targeting
- Investment Funding
- Investment Reporting

MESSAGE MGMT
- Message Definition
- Message Validation
- Message Structuring
- Message Matching
- Message Dissemination

RESEARCH MGMT
- Research Definition
- Research Identification
- Research Interpretation
- Research Structuring
- Research Dissemination

POLICY MGMT
- Policy Definition
- Policy Interpretation
- Policy Dissemination
- Policy Categorization
- Policy Information Mgmt

MARKET MGMT
- Market Definition
- Market Prioritization
- Market Targeting
- Market/Message Matching

LEVEL 2

CUSTOMER MGMT
- Customer Definition
- Customer Incentive Mgmt.
- Customer Information Management
- Customer Analysis

AGREEMENT MGMT
- Agreement Definition
- Agreement Offering
- Agreement Structuring
- Agreement Matching
- Agreement Information Management

DELIVERY CHANNEL MGMT
- Delivery Channel Definition
- Delivery Channel Analysis
- Delivery Channel Matching

PARTNER MGMT
- Partner Definition
- Partner-to-Partner Matching
- Partner Information Mgmt.

PRODUCT MGMT
- Product Conceptualization
- Product Design
- Product Creation
- Product Deployment
- Product Lifecycle Mgmt.

WORK MGMT
- Submission Mgmt.
- Work Item Mgmt.
- Work Queue Mgmt.
- Work Routing
- Time Mgmt.
- Work Event Mgmt.

SUPPORTING CAPABILITIES

FINANCE MGMT
- Financial Account Management
- Currency Mgmt
- Financial Transaction Mgmt.
- Financial Information Mgmt.

HUMAN RESOURCE MGMT
- HR Competency Mgmt.
- HR Compensation Mgmt.
- HR Hierarchy Mgmt.
- HR Information Mgmt.
- HR Supply/Demand Mgmt.

INFORMATION MGMT
- Information Definition
- Information Organization
- Information Aggregation
- Analytics Management
- Information Dissemination
- Information Packaging

ASSET MGMT
- Asset Definition
- Asset Matching
- Asset Inventory Mgmt.
- Asset Design
- Asset Creation

PROGRAM MGMT
- Program Definition
- Program / Schedule Matching
- Program / Human Resource Mgmt.
- Program Information Mgmt.

EVENT MGMT
- Event Definition
- Event/Schedule Matching
- Event/Asset Matching
- Event/Location Matching

TRAINING MGMT
- Training Definition
- Training Development
- Training Packaging
- Training Dissemination

Source: Business Architecture Associates, Inc.
Best Practices for level 2 object definition and decomposition

Level 1: ____ Management (e.g., Customer Management)

Level 2: ____ Definition (e.g., Customer Definition)

Level 2: ____ Matching (e.g., Customer Matching)

Where certain objects defined by other capabilities are associated with the level 1 parent object

Level 3: ____ / ____ Matching (e.g., Customer/Product Matching)

Level 3: ____ / ____ Matching (e.g., Customer/Location Matching)

Level 3: ____ / ____ Matching (e.g., Customer/Customer Matching)

Level 2: ____ Information Management (e.g., Customer Information Management)

Level 3: ____ Profile Management (e.g., Customer Profile Management)

Level 3: ____ Type Management

Level 3: ____ State Management

Level 3: ____ History Management

Level 3: ____ Analytics Management (for selected level 1 capabilities)

In the matching example, Customer is the controlling object to which other objects are matched

Source: BIZBOK® Guide, Business Architecture Guild
Best Practices for level 2 object definition and decomposition

Various level 1 capabilities would also incorporate standard level 2 capabilities, as determined on a case-by-case basis:

- **Level 2: Access Management** (e.g., Product Access Management, Agreement Access Management)

  *Note that Access is viewed as a constraining or allowing capability that addresses security*

- **Level 2: Risk Rating** (e.g., Customer Risk Rating, Facility Risk Rating, Location Risk Rating)

  *Note that Risk is typically associated with specific business objects*

- **Level 2: Preference Management** (e.g., Customer Preference Management) *(Where preferences are formal structures)*

  - **Level 3: Preference Definition** (e.g., Customer Preference Definition)
  - **Level 3: Preference Interpretation**
  - **Level 3: Preference Enforcement**

Additional level 2 capabilities vary depending on the object – here are some examples:

- For Product Management: Product Conceptualization, Design, Validation, etc.
- For Asset Management: Asset Definition, Design, Evolution, etc.

*Source: BIZBOK® Guide, Business Architecture Guild*
### BASIC CAPABILITY MAPPING SPREADSHEET

**Tier Level Capability Definition**

<table>
<thead>
<tr>
<th>Tier</th>
<th>Level</th>
<th>Capability</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

- **Tier**
  - 1=Strategic, 2=Core, 3=Supporting

- **Level**
  - 1, 2, 3, 4, 5, 6

- **Capability Name**

- **Definition of Capability**

Source: BIZBOK® Guide, Business Architecture Guild
### Strategic Tier 1 – Level 1 Capabilities from Common Reference Model

<table>
<thead>
<tr>
<th>Tier</th>
<th>Level</th>
<th>Capability</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Brand Management</td>
<td>Ability to establish, organize, analyze, administer, and report on all aspects of a category of product or offerings under a particular name, unique symbol, mark, or logo that distinguishes it from other products in the market.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Business Management</td>
<td>Ability to set strategic direction, generally govern, manage operational execution, and measure performance against plan for the legal entity and its ecosystem.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Intellectual Property Management</td>
<td>Ability to define, establish, validate, value, obtain, or dispose of inventions, patents, trademarks, trade secrets, copyrights, and know how as a basis for furthering the overall mission of the enterprise.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Investment Management</td>
<td>Ability to identify, develop, analyze, valuate, exchange, acquire, dispose of, and report on any type of monetary asset purchased with the idea that the asset will provide income in the future or will be sold at a higher price for a profit.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Market Management</td>
<td>Ability to identify, name, analyze, frame, and cater to an actual, virtual, or otherwise nominal place where forces of demand and supply operate, and where buyers and sellers interact — directly or through intermediaries — to exchange products and services for monetary or non-monetary value.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Message Management</td>
<td>Ability to define, craft, frame, vet, disseminate, and track a structured conveyance of information, including missives, notifications, alerts, and other internally or externally targeted communication about the company's mission, products, plans, activities, and other focal points.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Plan Management</td>
<td>Ability to develop, communicate, and coordinate an articulated direction, related work items, and priorities to further business development, organizational priorities, and enterprise goals and objectives across business units and entities within or outside the organization.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Policy Management</td>
<td>Ability to establish, maintain, comply with, and administer a set of statues, legislation, rules, procedures, regulations, treaties, and principles driven by internal business directives and external organizations, governments, or related third-party actors.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Research Management</td>
<td>Ability to conduct systematic investigation into materials and sources in order to establish facts and reach conclusions that comprise a result.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Strategy Management</td>
<td>Ability to define and disseminate mission, vision, goals, objectives, action items, and key performance indicators for the business, products, or other interest as required.</td>
</tr>
</tbody>
</table>

*Source: BIZBOK® Guide, Business Architecture Guild*
<table>
<thead>
<tr>
<th>Tier</th>
<th>Level</th>
<th>Capability</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>Asset Management</td>
<td>Ability to acquire, create, track, report on, and dispose of, tangible or intangible property with intrinsic value.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Event Management</td>
<td>Ability to establish, use, sustain, disseminate, and analyze an occurrence or happening at a determinable time and place, including physical and virtual meetings, conferences, or related gatherings of two or more persons.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Finance Management</td>
<td>Ability to plan, direct, monitor, organize, control, and report on the monetary aspects and resources of the business.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Human Resource Management</td>
<td>Ability to assess, mentor, compensate, terminate, and otherwise coordinate individuals that are or have been incorporated under a legal agreement that includes compensation and other benefits, on a temporary or permanent basis.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Information Management</td>
<td>Ability to define, organize, structure, secure, protect, and disseminate facts, statistics, attributes, and other types of data about a business’ set of business objects.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Job Management</td>
<td>Ability to identify, define, assign, and manage accountabilities whether remunerative or non-remunerative, assigned, specific, and accountable business duty, role, or function that can be executed by a human or non-human resource.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Legal Proceeding Management</td>
<td>Ability to direct, administer, oversee, respond to, and generally administer all aspects of work related to a litigation filing, including trials, appeals, or related actions.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Location Management</td>
<td>Ability to define, calculate, articulate, determine, disseminate, or otherwise track a position or site of any given entity (person, organization, equipment, product, etc.).</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Program Management</td>
<td>Ability to organize, plan, direct, and communicate progress against milestones to deliver outcomes within defined resources, time, quality, and scope constraints.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Training Management</td>
<td>Ability to define, conceptualize, create, and convey structured content and knowledge in consumable format, associated with a curriculum a course, workshop, seminar, or related content.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Work Management</td>
<td>Ability to capture, organize, prioritize, route, interpret, disseminate, and administer communications, tasks, and related decisions.</td>
</tr>
</tbody>
</table>
SELECTED INFORMATION MAPPING PRINCIPLES

- Information is a strategic business asset
- Information is a foundation for other business views
- Common, shared business vocabulary streamlines collaboration, communication, and automation
- Information is based on business objects
- Information is categorized into types
- Information has states
- Information has relationships to other information
- Capabilities modify information
- Capabilities use information to deliver outcomes
### Information Concept Definition & Dependency Mapping

<table>
<thead>
<tr>
<th>Information Concept</th>
<th>Information Concept Category</th>
<th>Information Concept Definition</th>
<th>Information Concept Types</th>
<th>Related Information Concepts</th>
<th>Information Concept States</th>
</tr>
</thead>
<tbody>
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</table>

**Information Concept:** The information concept realizes or makes explicit a business object, which would be derived from the capability map.

**Information Concept Category:** Primary information concept realizes a business object that is not dependent on another business object for its existence. All objects established by a level 1 capability fall into the primary category. For example, Agreement is established by a level 1 capability and therefore a primary information concept. A secondary information concept realizes a business object that is fully dependent on another business object for its existence. For example, Agreement Term is a secondary information concept as it is established by a level 3 capability under a parent capability and can only exist if there is an Agreement object.

**Information Concept Definition:** The definition of an information concept is derived from the object portion of the capability definition and omits the action portion of the definition.

**Information Concept Type:** Type represents the different variations of the information concept and can be multidimensional. For example, an Agreement may be a supplier or customer type of agreement and may also be an auto-renewing type of agreement.

**Related Information Concepts:** Relationships among information concepts reflect real world relationships among business objects. A relationship between information two concepts may be defined once from one concept to another with the understanding that relationship traceability is bidirectional.

**Information Concept States:** A list of possible information concept statuses or conditions.
<table>
<thead>
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<th>Information Concept States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agreement</td>
<td>Primary</td>
<td>A legally binding contract entered into between the organization and a legal entity or individual.</td>
<td>Reseller, Bank, Supplier, Lessor, Employer, Carrier Customer, Customer, Enterprise Customer</td>
<td>Asset, Policy, Order, Partner, Agreement, Financial Account, Payment, Facility, Channel, Conveyor, Network, Tax, Customer</td>
<td>Pending, In Force, Terminated, Abandoned</td>
</tr>
<tr>
<td>Agreement Term</td>
<td>Secondary</td>
<td>A legally enforceable condition set forth within the bounds of an agreement.</td>
<td>Financial, Penalty, Partner, Compiling, Customer Impacting, Business Entity</td>
<td>Agreement, Agreement Term, Location</td>
<td>Separable, Inseparable</td>
</tr>
<tr>
<td>Asset</td>
<td>Primary</td>
<td>A tangible good, such as equipment, computer, furniture, tool, software system, and other objects of intrinsic value that are used in a business context or packaged as goods into products offered to customers.</td>
<td>Equipment, Software, Computer, Machine, Desk, Cable Line, Lights</td>
<td>Asset, Location, Agreement, Partner, Channel, Facility</td>
<td>Deployed, Inactive, Retired</td>
</tr>
<tr>
<td>Brand</td>
<td>Primary</td>
<td>Named aspect of a product or offering, a category of products or offerings, or an organizational identity, representing it by a unique name, symbol, mark or logo, and value proposition, and cultural identity that distinguishes it from other products, offerings, or organizational identities in the market.</td>
<td>Global, Regional, Product, Company</td>
<td>Market, Product, Business Entity</td>
<td>Active, Inactive</td>
</tr>
<tr>
<td>Campaign</td>
<td>Primary</td>
<td>Outreach activity that targets a specific population, for example, customers, human resources, partners, and patients, to achieve a certain goal, such as marketing awareness, hiring activities, and health awareness.</td>
<td>Product, Brand Awareness, Employee, Social Good</td>
<td>Program, Product, Market, Location</td>
<td>Planned, Executed</td>
</tr>
<tr>
<td>Channel</td>
<td>Primary</td>
<td>Digital, analog, or physical conduit through which products, related services, or communications are delivered or received, including the Internet, phone, delivery service, satellite, radio, or physical means.</td>
<td>Digital, Partner, Direct</td>
<td>Partner, Policy, Product, Asset, Facility, Location</td>
<td>Active, Inactive</td>
</tr>
<tr>
<td>Customer</td>
<td>Primary</td>
<td>An individual or other legal entity that has, plans to have, or has had a legally binding agreement with the organization, or otherwise is a recipient or beneficiary of the organization’s products and services.</td>
<td>Retail, Individual, Corporate, Preferred</td>
<td>Strategy, Plan, Program, Market, Product, Customer, Partner, Human Resource, Channel, Location</td>
<td>Pending, Current, Past, Indirect</td>
</tr>
<tr>
<td>Finance</td>
<td>Primary</td>
<td>Monetary aspects and resources of the organization.</td>
<td>Customer, Partner, Budgetary, Savings, Receivables, Ledger</td>
<td>Agreement, Order, Customer, Partner</td>
<td>Open, Closed, Overdue</td>
</tr>
<tr>
<td>Financial Account</td>
<td>Secondary</td>
<td>A named container of monetary value that is organized into debits, credits, liabilities, equity, and related categories such as customer, savings, checking, payables, general ledger, budgetary, and receivables categories.</td>
<td>Customer, Partner, Budgetary, Savings, Receivables, Ledger</td>
<td>Agreement, Order, Customer, Partner</td>
<td>Open, Closed, Overdue</td>
</tr>
<tr>
<td>Financial Transaction</td>
<td>Secondary</td>
<td>A monetary event or related exchange across businesses, agreements, and financial accounts.</td>
<td>Buy, Sell, Payment</td>
<td>Financial Account</td>
<td>Pending, Completed</td>
</tr>
</tbody>
</table>
• Room will organize into teams – one team per table
• Each team will take a related industry sector or subsector for the day
  • Sectors will be agreed to and assigned
  • Teams can organize at break
  • Work should take on content unique to a given sector
• Team will map:
  • 1-2 value streams
  • 4-5 level 1 capabilities
  • 4-5 information concept
ADDITIONAL MAPPING TEAM GUIDANCE

• **Value streams**
  • Identify two value streams
  • Articulate one value stream as follows:
    • Define value stream, identify triggering stakeholder(s) and value proposition
    • Map out and define each stage, identifying value items, stage entrance and exit criteria

• **Capabilities**
  • Identify 2-3 level 1 capabilities, defining each level 1
  • For one level 1 capability,
    • Identify level 2 capabilities, defining each level 2
    • For one level 2 capability, identify and define level 3 capabilities
    Note: If picking finance capabilities, see workshop leaders for guidance

• **Information Concepts**
  • For each of the level 1 capabilities, and where any business objects were introduced below level 1, map out the corresponding information concepts