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ACTIVITY AND PROCESS MODELING PHASE

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ACTIVITY AND PROCESS MODELING WORKSHOP

Purpose

The purpose of the Activity and Process Modeling Workshop is skills-transfer: to train participants in Activity Modeling, Activity Based Costing and Process Modeling techniques to allow them to complete the Activity and Process Modeling Phases. The Activity and Process Modeling Workshop also enables participants to develop components of the initial Activity Models and Process Models. These correspond to Activity Models in the "Owner's View" and Process Models in the "Designer's View" for the Function ("How") column of the Zachman Framework for Enterprise Architecture.

Preparation

In preparation for the Activity and Process Modeling Workshop, the organization must have completed the Tactical and Operational Modeling Phase and have developed stable Tactical and Operational Data Models. The organization's Tactical and Operational Business Plans should also have been expanded to include Business Plan directions for definition of the reusable business activities and business processes identified during the Tactical and Operational Modeling Phase.

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Activities

In the Activity and Process Modeling Workshop, the participants:

- Confirm and refine (if necessary) the Business Planning statements for definition of the identified reusable business activities and business processes
- Learn Enterprise Engineering Activity Modeling, Activity Based Costing and Process Modeling techniques
- Develop initial Activity Models and Activity Based Costing at the direction of the Facilitator, using their project as the case study source
- Develop initial Process Models at the direction of the Facilitator, using their project as the case study source
- Optionally capture the resulting Activity Models, Activity Based Costing and Process Models in a modeling tool
- Develop Activity Model, Activity Based Costing and Process Model Quality Assurance procedures
- Optionally gain an appreciation of code generation in various language using tools based on automatic code generation from database code patterns

Duration

5 days of lecture sessions, together with hands-on case study sessions using the project as the case study source. All participants attend full-time.

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Deliverables

The workshop teaches participants the basic skills necessary to complete the definition of Activity Models, Activity Based Costing and Process Models. At the completion of the workshop the following deliverables will have been produced by the participants:

- Initial Activity Models and Activity Based Costing at the direction of the Facilitator, using their project as the case study source
- Initial Process Models at the direction of the Facilitator, using their project as the case study source
- Initial Activity Maps and Process Maps of selected priority project areas
- Tactical and Operational Business Planning statements linked to relevant Activities and Processes of the Activity and Process Models
- Project Plans for conduct of the detailed Activity Modeling, Activity Based Costing and Process Modeling Phases of the project for rapid delivery

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Scope

The scope of the Activity and Process Modeling Workshop is one or more reusable business activities and business processes in functional areas of the business. Depending on the selected tactical project areas from the Enterprise Architecture strategic model, it may address activities and processes of functional areas that are required by later key implementation subprojects.

Participants

Functional area mid-level managers, business experts and the IT project team. At least one of the project team members should have participated in the Tactical and Operational Modeling and - ideally - also the Strategic Modeling Phase of the project.

Format

The workshop is partly conducted as formal lecture sessions that provide skills-transfer in Activity Modeling, Activity Based Costing and Process Modeling principles and techniques. Participants are then assigned to case study project teams, where they apply the concepts learned to conduct Activity Modeling, Activity Based Costing and Process Modeling sessions for the selected priority Enterprise Architecture project areas.

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FACILITATOR

Clive Finkelstein

Clive Finkelstein is acknowledged worldwide as the "Father" of Information Engineering, and is Managing Director of Information Engineering Services Pty Ltd in Australia. He has over 43 years' experience in the Computer Industry. He has published many books and papers, and contributed Chapters and Forewords to books published by McGraw-Hill and Springer-Verlag. Clive has authored the following books:

- *"Information Engineering"*, James Martin and Clive Finkelstein, Savant Institute, Carnforth: Lancs UK (1981). This was the book that started the Information Engineering Revolution in the 1980's.
- *"An Introduction to Information Engineering"*, Clive Finkelstein, Addison-Wesley, Sydney: Australia (1989). This book covers the history and evolution of Information Engineering.
- *"Information Engineering: Strategic Systems Development"*, Clive Finkelstein, Addison-Wesley, Sydney: Australia (1992). This is the "how-to" book on using Information Engineering.
- *"Building Corporate Portals with XML"*, Clive Finkelstein and Peter Aiken, McGraw-Hill New York: NY (2000). This book covers methodologies and technologies for Enterprise Portals.
- *"Enterprise Architecture for Integration: Rapid Delivery Methods and Technologies"*, Clive Finkelstein, to be published in 2005. This brings together the methods and technologies for rapid delivery of Enterprise Architecture in 3-month increments. This activity is based on material from that book.

Clive Finkelstein is an internationally renowned consultant and instructor, and has completed projects for Defense, Government and Commercial organizations throughout the world and in most industries. Many projects have involved the *Zachman Framework for Enterprise Architecture*, using the latest methods and technologies for rapid delivery of priority areas into implementation. These methods use Enterprise Engineering for rapid definition of Enterprise Architecture. His technology focus addresses Enterprise Integration technologies using XML, Enterprise Application Integration (EAI), Enterprise Portals, Web

Services and Service-Oriented Architecture (SOA) for Business Process Management (BPM) using XML-based BPM languages.

He provides training and consulting in all aspects of the Zachman Framework for Enterprise Architecture, with rapid delivery of priority areas using Enterprise Engineering. His application of these methods in large and medium Government, Defense and Commercial enterprises results in *Business Transformation Enablement*, so that business and IT managers and their staffs can plan for and achieve rapid business change. Enterprise Architecture provides a Governance Analysis Framework that supports Sarbanes-Oxley and other Governance Audit requirements. It provides direct support and linkage to Balanced Scorecard for Strategy-Focused Organizations, to ensure that IT systems and databases support defined Scorecard Measures, Strategy Maps and Governance requirements.

Clive writes a monthly column, "The Enterprise" for DM Review magazine. Past issues are at <http://www.dmreview.com/>. He publishes a free, quarterly technology newsletter via email: "The Enterprise Newsletter (TEN)". Past issues of TEN are at: <http://www.ies.aust.com/>. His books and papers are at <http://www.ies.aust.com/cbfindex.htm>. He can be contacted at cfink@ies.aust.com. Many in-house skills-transfer courses and seminars presented by Clive Finkelstein are at <http://svc004.bne009i.server-web.com/catalogue/visible/default.shtml>.



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