Methodology and Technology Services

TACTICAL AND OPERATIONAL MODELING PHASE

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TACTICAL AND OPERATIONAL MODELING WORKSHOP

Purpose

The purpose of the Tactical and Operational Modeling Workshop is skills-transfer: to train participants in Logical Data Modeling techniques to allow them to complete the Tactical and Operational Modeling Phases. The Tactical and Operational Modeling Workshop also enables participants to develop components of the initial Enterprise Architecture tactical and operational data models. This corresponds to the Logical Data Model in the "Designer's View" for the Data ("What") column of the Zachman Framework for Enterprise Architecture.

Preparation

In preparation for the Tactical and Operational Modeling Workshop, the organization must have completed the Strategic Modeling Phase and have developed a stable strategic data model for the enterprise. The organization's Strategic Business Plan should also have been expanded to include a Tactical Business Plan for implementation of a tactical-level component of the Strategic Business Plan.

Client personnel at the tactical level of the Enterprise Architecture project area may need to complete the Tactical Modeling Questionnaire for their functional area, 2 - 3 weeks before the start of this workshop. The Tactical Modeling Questionnaire is downloaded from the link below. This is tailored by inserting the enterprise Mission and Purpose statement in

Question 1a). The other questions are reviewed, and reworded or tailored to reflect the enterprise's terminology or environment.

- [Download Questionnaire for Tactical Modeling Workshop](#)
  (as zipped Word file)

The Questionnaire is then distributed 2 – 3 weeks before the start of the workshop to all invited Tactical and Operational Modeling Workshop attendees. It is to be completed by each individual and returned prior to the commencement of the workshop so all responses can be consolidated. On their receipt, all responses are consolidated anonymously under each question. This Consolidated Questionnaire will be distributed to all participants at the start of the Tactical and Operational Modeling Workshop for use as a catalyst by the facilitator.

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Activities

In the Tactical and Operational Modeling Workshop, the participants:

- Confirm and refine (if necessary) the Tactical Business Planning statements

- Learn Enterprise Engineering Tactical and Operational Data Modeling techniques

- Develop initial Tactical and Operational Data Models at the direction of the Facilitator, using their project as the case study source

- Optionally capture the resulting Tactical and Operational Data Models in a modeling tool

- Analyze the Tactical and Operational Data Models using Entity Dependency Analysis methods, to derive Project Plans for rapid delivery. This analysis is carried out manually. However if the modeling tool is used, the analysis can be carried out automatically

- Develop Tactical and Operational Data Model Quality Assurance procedures

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 Tactical and Operational Data Models. At the completion of the workshop the following deliverables will have been produced:

- Initial documented Tactical and Operational Data Models - as Logical Data Models - for the selected Tactical and Operational project areas

- Tactical and Operational Data Maps of selected priority project areas

- Documented Tactical Planning statements linked to the data in the Tactical and Operational Data Models

- Project Plans for conduct of the subsequent detailed Tactical and Operational Modeling Phases of the live project for rapid delivery

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Scope

The Tactical and Operational Modeling Workshop scope is one or more functional areas of the business. Depending on the selected tactical project areas from the Strategic Model, it may address areas that are required by the 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 Strategic Modeling Workshop for the project.

Format

The workshop is partly conducted as formal lecture sessions that provide skills-transfer in Tactical and Operational Modeling principles and techniques. Participants are then assigned to case study project teams, where they apply the concepts learned to conduct tactical modeling sessions for the selected priority 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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