

RAPID DELIVERY OF ENTERPRISE ARCHITECTURE

INHOUSE TAILORED WORKSHOPS

- **5-Day Tactical and Operational Modeling Workshop**

5-DAY TACTICAL AND OPERATIONAL MODELING WORKSHOP

Purpose

The purpose of the Tactical and Operational Modeling Workshop is skills-transfer: to train client participants in 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 "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 of the Enterprise Architecture. 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 Management Questionnaire for their functional area, 2 – 3 weeks before the start of this workshop. All questionnaire responses are then consolidated under each question. This consolidated questionnaire is distributed to all personnel at the start of the workshop.

Activities

In the Tactical and Operational Modeling Workshop, the participants:

- Confirm and refine tactical Enterprise Architecture business planning statements
- Learn the initial Enterprise Engineering tactical data modeling techniques
- Conduct initial Enterprise Architecture tactical and operational data modeling at the direction of the facilitator
- Analyze the Enterprise Architecture strategic and tactical level data models
- Develop Enterprise Architecture tactical and operational model quality assurance procedures

Deliverables

The workshop teaches participants basic skills necessary for completing tactical and operational modeling. At the completion of the workshop the following deliverables will have been produced:

- An initial documented tactical model for the selected Enterprise Architecture tactical project areas
- A tactical data map of the selected priority Enterprise Architecture functional area(s)

- Documented Enterprise Architecture tactical planning statements linked to the data map
- A project plan for the conduct of the Tactical Modeling Phase of the project

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 and Strategic Modeling Phase of the project.

Scope

The Tactical and Operational Modeling Workshop scope is one or more functional areas of the business. Depending on the selected tactical area(s) from the Enterprise Architecture strategic model, it may address areas that are required by the following key implementation subprojects.

Duration

5 days. All participants attend full-time.

Workshop Format

The workshop is partly conducted as formal lecture sessions that provide skills-transfer in tactical 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 Enterprise Architecture functional area(s).

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 46 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, Artech House, Norwood MA (March 2006). This book is the reference for the course, which covers the rapid delivery methods and technologies.

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. The emphasis of these projects has been to bridge from strategic business plans to information systems, so aligning systems closely with corporate goals. Many projects have involved the *Zachman Framework for Enterprise Architecture*, using the latest methods and technologies for rapid delivery of priority processes into production. 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.

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 strategies and governance requirements for Enterprise Architecture maturity.

He provides training and consulting in all aspects of the Zachman Framework for Enterprise Architecture, with rapid delivery of standardized processes using Enterprise Engineering. During implementation he also moves organizations to rapid implementation using XML, Enterprise Portals, Web Services, BPM and SOA. These provide a central gateway to the information and knowledge resources of an enterprise on its Intranet and via the Internet. Enterprise Architecture, Enterprise Portals, Web Services, SOA and BPM will be key development methods and delivery technologies for most enterprises in the 21st century.

Clive writes a monthly online column on Enterprise Architecture for the BEye Network online magazine in the USA. He also publishes a free, quarterly technology newsletter via email: *"The Enterprise Newsletter (TEN)"*. Past issues of TEN are available from: http://www.ies.aust.com/ten/TEN_index.htm. His books, papers and projects are also summarized on the IES web site at <http://www.ies.aust.com/cbfindex.htm>. He can be contacted at <cfink@ies.aust.com>. Many in-house skills-transfer workshops, seminars and online webcast courses presented by Clive Finkelstein are available at <http://shop.ies.aust.com/>.



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