

## ENTERPRISE ARCHITECTURE FOR MANAGERS AND IT

*PUBLIC OR IN-HOUSE 1-DAY OVERVIEW SEMINAR  
FOR BUSINESS MANAGERS AND IT STAFF ON ENTERPRISE ARCHITECTURE*

## RAPID DELIVERY METHODS FOR ENTERPRISE ARCHITECTURE MATURITY

*PUBLIC OR IN-HOUSE 2-DAY WORKSHOP WITH INTERACTIVE TEAM  
SESSIONS TO FAST-TRACK YOUR ENTERPRISE ARCHITECTURE MATURITY*

## RAPID DELIVERY TECHNOLOGIES FOR ENTERPRISE ARCHITECTURE MATURITY

*PUBLIC OR IN-HOUSE 1-DAY SEMINAR ON  
TECHNOLOGIES FOR RAPID DELIVERY INTO PRODUCTION*

**Presented by Clive Finkelstein**

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The MIT Sloan Center for Information Systems Research (CISR) in the USA conducted a survey of 456 enterprises between 1995 and 2006. This identified four distinct architectural stages:

- Stage 1: Business Silos
- Stage 2: Standardized Technology
- Stage 3: Standardized Processes
- Stage 4: Business Modularity

Business units and IT must pass through all four stages before SOA's benefits can be fully realized. The MIT Sloan CISR says that: *"None of these stages can be skipped, but they can be speeded up. As most organizations are in the first or second stages, it will be years, perhaps decades before SOA is adopted in a truly effective way."*

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- Learn how to evolve rapidly through the lower stages to achieve Stage 3 and Stage 4 ROI and benefits, with priority standardized processes delivered into production for business modularity.
  - Learn how to achieve Enterprise Architecture maturity with rapid delivery of standardized processes in 3-month increments
  - Learn Rapid Delivery Methods for Enterprise Architecture successfully used world-wide by many Government and Corporate organizations
  - Learn Rapid Delivery Technologies using XML, Enterprise Application Integration (EAI), Web Services and Service Oriented Architecture (SOA)
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### **AUDIENCE**

- CIO, CTO, Corporate Planners
- Governance and Audit Staff
- Business Managers, Business Experts
- IT Managers, Project Managers,
- Enterprise Architects
- BPR Analysts, BPM Analysts,
- Business and Systems Analysts
- Systems Developers, Web Developers

# ENTERPRISE ARCHITECTURE FOR MANAGERS AND IT

*Overview on Transforming Business Plans into Strategic Models for  
Rapid Delivery into Production of Priority Standardized Processes*

**NOTE: Day 1 is a prerequisite for Days 2-3 and Day 4**

## Morning Session

### 1. STRATEGIC MODELING AND ENTERPRISE ARCHITECTURE MATURITY

This session introduces the concepts of Enterprise Architecture in Government and the Private Sector, the critical role of senior management participation and their vital strategic direction for achieving success

- Enterprise Architecture as Strategy: aligning the business and IT for successful implementation
- What are the implications and benefits of the four stages of Enterprise Architecture maturity?
- What are strategic models and how do you establish them for rapid EA delivery?
- How can Strategic Models be used to support Balanced Scorecard and Enterprise-Wide Transformation?
- How can Federal Enterprise Architecture (FEA) Reference Models for US Government, the DoD Architecture Framework and TOGAF use the rapid delivery EA methods in this workshop?
- What are the latest Zachman Framework V2.01 (released Aug 2007) and the Zachman Framework Standards?

## Morning Tea

### 2. STRATEGY ANALYSIS INPUT TO STRATEGIC MODELING

This session covers the Strategy Analysis method for rapid definition and refinement of strategic and tactical business plans and program plans, and their incorporation in position descriptions for managers throughout the enterprise

- Gathering and interpreting existing plans and directions for implementation accountability at all management levels
- Analyzing the Perspectives of Planners and Owners to provide the basis for business transformation and implementation of Enterprise Architecture

## Lunch

## Afternoon Session

### 3. FACILITATED EXAMPLE – STRATEGIC MODELLING FOR RAPID DELIVERY

This interactive session illustrates how to transform business plans into a strategic model used to identify standardized processes and for development of a tailored Enterprise Architecture Portfolio Plan, for rapid delivery of priority processes into production in 3-month increments

- How to define an initial strategic model from business plans, as a "picture of the business"
- Transforming business plans into integrated databases and reusable standardized processes
- Analyzing and identifying priority business activities and standardized processes from the strategic model
- Deriving project plans from strategic models for rapid delivery of priority standardized processes into production

## Afternoon Tea

### 4. IN-DEPTH CASE STUDIES – RAPID DELIVERY PROJECTS

Real-world examples of Public and Private Sector projects from Australia, Canada and Kuwait are reviewed with emphasis on delivery of priority standardized processes into production in 3-month increments

- Review of Private-Sector and Public-Sector projects that applied these methods for rapid delivery of Enterprise Architecture Portfolio Plans over 15 - 20 days
- Overview of rapid development of Enterprise Architecture Portfolio Plans to achieve success of each project
- Review of Criteria for Success in each of these projects
- Review of potential failure issues to avoid in each of these projects
- Cost justification for long-term strategic planning and obtaining funding approval for Enterprise Architecture

## End of Day 1

## **RAPID DELIVERY METHODS FOR ENTERPRISE ARCHITECTURE MATURITY**

*Workshop on Rapid Delivery Methods for Integrated Data Models, Reusable Business Activities and Standardized Business Processes*

### **Morning Session**

#### **5. DRIVING INTEGRATION: BUSINESS-DRIVEN DATA MAPPING FOR EA**

Covers the business -driven method to transform strategic and tactical business plans and program plans into business models for use as a rapid-delivery implementation roadmap

- Applying Enterprise Engineering disciplines and proven methodologies to develop a “picture of the business”
- Identifying standardized processes from data models
- Resolution of semantic issues and definition of agreed metadata for later rapid XML and SOA implementation

### **Morning Tea**

#### **6. BUSINESS NORMALIZATION TO IDENTIFY FUTURE NEEDS**

Covers the method of Business Normalization that is used by business experts and IT staff in a joint design partnership, to identify future business needs

- Expand strategic data model into tactical data models with required data attributes
- Learn how to identify further business data needs and standardized business processes that indicate business opportunities
- Learn methods and rules for business-model to systems-model transformations
- Identifying expert rules for dynamic management of expert systems and knowledge bases

### **Lunch**

### **Afternoon Session**

#### **7. STRATEGIC MODELLING: INTERACTIVE WORKSHOP**

In this Interactive workshop session, the initial Strategic Model developed in the Facilitated Example in Session 3 of Day 1 is expanded to greater strategic detail, as directed by the delegates acting as business experts

- Identifying additional data entities from strategic business plans and expert business knowledge
- Cross-checking and refining the strategic model based on expert business knowledge
- Identifying reusable business activities and standardized processes in the expanded strategic data model

### **Afternoon Tea**

#### **8. STRATEGIC ALIGNMENT: INTERACTIVE WORKSHOP**

In this interactive workshop session, learn how to align data, processes, locations, people, events and program plans for business integration opportunities and corporate governance Engaging Executive Management in Security and Governance Analysis Frameworks

- Aligning Models across rows and columns to realize business integration opportunities

#### **9. DERIVING ENTERPRISE ARCHITECTURE PORTFOLIO PLANS FOR RAPID DELIVERY**

This interactive workshop session shows how to derive the Enterprise Architecture Project Plan (EAPP) and prioritize implementation efforts based on data models, business plans and business rules

- Learn how to refine project scope and deliverables for rapid sub-project deliveries in 3-month increments
- Learn how to define and use project maps to balance mandates, business plans and resource demands to deliver standardized processes rapidly into production
- Learn how to achieve rapid portfolio management alignment and integration, with rapid implementation delivery

### **End of Day 2**

## 4-DAY RAPID DELIVERY WORKSHOP FOR ENTERPRISE ARCHITECTURE MATURITY

### Morning Session

#### 10. STANDARDIZED PROCESS OPPORTUNITIES, ROI AND COST ANALYSIS METHODS

Covers Activity Modelling and Activity Based Costing methods to analyze opportunities for standardized process improvement, cost effectiveness and Return on Investment

- Evaluating implementation alternatives for reusable activities and standardized processes, presenting Enterprise Integration opportunities for dramatic ROI improvement
- Cost justification of Enterprise Architecture based on reusable business activities and standardized processes, through rapid evolution to high-ROI stage of Enterprise Architecture Maturity – Stage 4: Business Modularity
- Review of Enterprise Architecture as Strategy: aligning the business and IT for successful implementation

### Morning Tea

#### 11. DEFINE STANDARDIZED PROCESSES, WORKFLOWS AND INTERFACE DESIGN

Covers Process Modeling methods for rapid definition of priority reusable standardized business processes

- Methods to implement reusable activities as standardized business processes
- Developing Workflow Models and interfaces from data models for priority standardized processes
- Distributed data base and transaction performance optimization for priority standardized processes

### Lunch

### Afternoon Session

#### 12. IN-DEPTH WORKSHOP: TRANSFORMING FROM STRATEGIC DATA MODEL TO LOGICAL DATA MODEL

This interactive workshop session shows how to transform from tactical business plans for priority strategic data models to detailed logical data models for rapid design and delivery

- Identifying tactical data as a logical data model from tactical business plans
- Identifying tactical business processes from expert business knowledge
- Deriving project plans from the tactical data model for priority tactical business processes

### Afternoon Tea

#### 13. IN-DEPTH WORKSHOP: VALIDATING STRATEGIC MODELING DELIVERABLES

A workshop session to review business transformation deliverables developed in earlier workshops of the course for Enterprise Architecture completeness

- Determining Enterprise Architecture deliverables for governance alignment with standardized processes
- Documentation of Enterprise Architecture Portfolio Plan (EAPP) Report for rapid delivery of priority standardized processes into production in 3-month increments

#### 14. MANAGING & SUSTAINING ENTERPRISE ARCHITECTURE

Review session to assess Policies, Roles, Goals and Responsibilities and how Enterprise Architecture supports the management of Enterprise Change for the Future

- Establishing strategies for rapid implementation and evolution to Stage 3: Standardized Processes
- Sustaining executive involvement for evolution to Stage 4: Business Modularity
- Review of Governance Analysis Frameworks for Audit and Security Internal Control Reporting
- Enterprise Architecture and strategic modelling support for balanced scorecard strategies and measures
- Review of how to use Enterprise Architecture to improve a business; creating funding as a positive outcome
- Executive strategies to manage enterprise change and business-driven change on a large scale, with EA-led transformation

### End of Day 3

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*"Clive has developed a way to integrate the semantic models with the primitive process models. Strategically, this is important because if you align these with the goals of the business, you can determine what ... needs to be built first to implement Enterprise Architecture consistently in the enterprise." ... Stan Locke, Zachman Framework Associates*

*Included with permission from Intervista Institute, Montréal, Canada*

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**DAY 4**

**RAPID DELIVERY TECHNOLOGIES FOR ENTERPRISE ARCHITECTURE MATURITY**

*Using XML, Web Services, Enterprise Application Integration (EAI), Service Oriented Architecture (SOA) and Business Process Management (BPM) for Rapid Delivery of Standardized Processes Identified in Days 1-3*

**Morning Session**

**1. REVIEW OF XML, XSL AND XSLT FOR INTEGRATION**

Reviews concepts of XML, Extensible Style Language Transformation (XSLT) and XSL used for integration by EAI, for Web Services and for generated Business Process Management (BPM) executable code for SOA

**Morning Tea**

**2. ENTERPRISE APPLICATION INTEGRATION (EAI) CONCEPTS**

Discusses Enterprise Application Integration (EAI) concepts and XML messaging standards used also with SOA

- Reviews EAI approach used by ebXML for EDI
- Reviews EAI vendor strategies, products and associated technologies from webMethods, Microsoft, IBM, TIBCO, SeeBeyond, Vignette and others

**3. WEB SERVICES CONCEPTS AND EVOLUTION**

Introduces concepts of Web Services, together with Simple Object Access Protocol (SOAP), Web Services Description Language (WSDL) and Universal Description, Discovery and Integration (UDDI)

**4. REVIEW OF WEB SERVICES STRATEGIES AND PRODUCTS**

Discusses different Web Services scenarios and the market evolution of Web Services

- Examines the impact that Web Services have on existing EAI approaches
- Reviews Web Services vendor strategies, products and associated technologies from Microsoft, IBM, Oracle, Software AG, BEA, and others together with Web Services interoperability
- Need for IT understanding of business issues
- Discusses interoperability and security implications of web services and EAI

**Lunch**

**Afternoon Session**

**5. SOA AND BPM CONCEPTS, STRATEGIES AND PRODUCTS**

Introduces the concepts of Service Oriented Architecture (SOA), Event Driven Architecture (EDA) and Business Process Management (BPM) languages for dynamic invocation

- Discusses BPM languages that are generated from Workflow Models or Process Models
- Several BPM languages are covered including Business Process Execution Language (BPEL), Business Process Modeling Language (BPML), Business Process Specification Schema (BPSS – also called ebBP) for ebXML and Business Process Modeling Notation (BPMN)
- Reviews SOA and BPM vendor strategies, products and associated technologies from Microsoft, IBM, SAP, Software AG, webMethods, SeeBeyond, TIBCO, Plumtree, Vignette, Intalio
- SOA Governance, covering the importance of Enterprise Architecture and ownership of components
- The Role of Enterprise Service Bus (ESB) and Repository products for SOA Governance and Management of large-scale enterprise change
- Reviews rapid delivery modeling tools from IBM Rational, Telelogic, CA, Provision, Visible, Sparx Systems and others

**Afternoon Tea**

**6. RAPID DELIVERY USING XML, EAI, WEB SERVICES AND SOA**

Reviews how all these technologies are used with priority standardized processes that were identified in Days 1 – 3, using Enterprise Architecture

- Shows how integration technologies are used to deliver priority standardized processes into production, for rapid evolution to Stage 3 and Stage 4 of EA maturity
- Discusses maintenance methods based on these technologies and Enterprise Architecture so enterprises can respond rapidly to business changes through Business Modularity

**End of Day 4**

## 4-DAY RAPID DELIVERY WORKSHOP FOR ENTERPRISE ARCHITECTURE MATURITY

### 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 21<sup>st</sup> 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](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](mailto: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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