

The **Turning** Point

*A Novel about Agile Architects
Building a Digital Foundation*

by Stephanie Ramsay,
Kees van den Brink,
and Sylvain Marie

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Title: The Turning Point: A Novel about Agile Architects Building a Digital Foundation
Series: The Open Group Series
A Publication of: The Open Group
Authors: Stephanie Ramsay, Kees van den Brink, Sylvain Marie
Publisher: Van Haren Publishing, 's-Hertogenbosch - NL, www.vanharen.net
ISBN Hardcopy: 978 94 018 0802 6
ISBN eBook: 978 94 018 0803 3
ISBN ePUB: 978 94 018 0804 0
Edition: First edition, first impression, September 2021

Layout and Cover Design: The Open Group

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The Turning Point: A Novel about Agile Architects Building a Digital Foundation

Published by The Open Group, September 2021.

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Table of Contents

Preface	3
The Open Group Press	3
The Open Group	3
Foreword	4
A Note from the Authors	5
Cast of Characters, in Order of Appearance	6
About the Authors	7
Dedications	9
Trademarks	10
Acknowledgements	11
Referenced Documents	12
1. Digital Customer Intimacy Strategy Kickoff	15
Failed Digitalization	15
Building the Vision	19
Presenting the New Structure: Flow of Work	23
2. Architecture Standards for a Digital Transformation	30
The Funding Issue	30
Deciding on the Basics	32
3. Strategy to Portfolio	34
Solving the Funding Issue	34
4. Requirement to Deploy	38
Changing Gears: The Emerging Product Architecture	38
Misaligned Choices	39
Architecture Debt	40
Creating Room to Breathe by Strangling	46
5. Request to Fulfill	50
A Technology Update Breaks the System	50
Planning Ahead	54
6. Detect to Correct	56
Security Lockdown	56
Reducing Complexity	62
7. Supporting Functions	65
The Agile Governance Quandary	65
Results of the Governance Stakeholder Meeting	68
Where did the Money Go?	71

The Exit	75
8. The Open Group Presentation	78
An Invitation to Present at The Open Group	78
Kathleen’s Presentation	80
Bonus Material	91
Bonus Section A: Architecture Vision	92
A.1 Stakeholder Interviews to Capture Concerns	92
A.2 Results of the Stakeholder Interviews	94
A.3 Stakeholder Motivation – Drivers and Assessments	95
A.4 Goal-Based Principles that will Guide the Architecture	97
A.5 Courses of Action Chosen or Considered	98
A.6 High-Level Target Architecture	99
A.7 Next Steps for Defining Value Stream Stages	100
Bonus Section B: Business Architecture	102
B.1 Value Stream Stage Definition Assignments	102
B.2 Architecture Deliverables for Each Value Stream Stage	105
B.3 Architecture Status Meeting	108
B.4 Target Architecture Realization of Business Requirements	111
B.5 Capabilities Gap Analysis	112
B.6 Capability Realization Resource Map	113
B.7 Second Architecture Status Meeting	115
Bonus Section C: Information Systems Architectures	118
C.1 Information Systems Architectures – Application Architecture	118
C.2 Application Architecture Gap Analysis	121
C.3 Information Systems Architectures – Data Architecture	121
Bonus Section D: Technology Architecture	124
D.1 Technology Gap Analysis	126
Bonus Section E: Opportunities & Solutions and Migration Planning	129
E.1 Transition Architecture	129
E.2 Implementation Work Packages	129
E.3 Digital Customer Intimacy Roadmap	130
Bonus Section F: The Stakeholder Meeting on Architecture Governance	132

Preface

The Open Group Press

The Open Group Press is an imprint of The Open Group for advancing knowledge of information technology by publishing works from individual authors within The Open Group membership that are relevant to advancing The Open Group mission of Boundaryless Information Flow™. The key focus of The Open Group Press is to publish high-quality monographs, as well as introductory technology books intended for the general public, and act as a complement to The Open Group Standards, Guides, and White Papers. The views and opinions expressed in this book are those of the authors, and do not necessarily reflect the consensus position of The Open Group members or staff.

The Open Group

The Open Group is a global consortium that enables the achievement of business objectives through technology standards. Our diverse membership of more than 800 organizations includes customers, systems and solutions suppliers, tools vendors, integrators, academics, and consultants across multiple industries.

The mission of The Open Group is to drive the creation of Boundaryless Information Flow™ achieved by:

- Working with customers to capture, understand, and address current and emerging requirements, establish policies, and share best practices
- Working with suppliers, consortia, and standards bodies to develop consensus and facilitate interoperability, to evolve and integrate specifications and open source technologies
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- Developing and operating the industry's premier certification service and encouraging procurement of certified products

Further information on The Open Group is available at www.opengroup.org.

The Open Group publishes a wide range of technical documentation, most of which is focused on development of standards and guides, but which also includes white papers, technical studies, certification and testing documentation, and business titles. Full details and a catalog are available at www.opengroup.org/library.

Foreword

The great benefit of this novel is that it presents a practical application of industry open standards, used in combination; not in the dry *factual* style that you often see in such an exercise, but in a funny and engaging story with a great cast of characters.

It is 20 years ago this year that we began toying with ideas to better support Enterprise Architects in expressing their designs, allowing them to move away from unclear pictures in typical office productivity tools toward proper models that allow visualization and analysis from different angles and for many purposes. By 2002, these ideas had become formalized into the ArchiMate® R&D project that I managed at the Telamatica Instituut in the Netherlands. These efforts evolved and ultimately produced The Open Group ArchiMate Standard. In this novel, the ArchiMate Standard is used in conjunction with many other standards from The Open Group, including the IT4IT™, DPBOK™, and O-AA™ Standards.

The Turning Point builds upon one of the core demonstration cases from the ArchiMate world – the fictitious but realistic insurance company, ArchiSurance. This case study has been extended over the years and in this novel you will read how ArchiSurance is now using Agile Architecture practices in support of its “Digital Customer Intimacy” strategy, which is going to take the company to a new, fully digitized operating model. You will follow the daily life of Kathleen Stone, Chief Architect of ArchiSurance, and her colleagues, and see how they deal with all kinds of challenges, ranging from governance in an Agile context to cybersecurity issues, and from funding discussions to managing technological complexity.

I hope you will enjoy this novel as much as I did. I think it is a great introduction to architecture practice and the valuable role that standards can play in it. It will appeal to both novices in the field and to experienced architects who want to know more about the benefits of these standards, and how they can be used together to great effect.

Marc Lankhorst
Managing Consultant & Chief Technology Evangelist, BiZZdesign
Enschede, The Netherlands
June 2021

A Note from the Authors

This is a novel from The Open Group Press: *The Turning Point: A Novel About Agile Architects Building a Digital Foundation*.

The novel is about a fictional company on a Digital Transformation [1] journey. The story is seen through the eyes of the main character, Dr. Kathleen Stone, Chief Architect for ArchiSurance. Kathleen and her team uncover many of the typical problems faced by companies as they make decisions to deploy digital technologies.

The story describes the foundational work necessary for companies that would like to deploy digital technology at a faster pace. It describes the difficulties that companies encounter due to organizational structures that have caused redundant roles, processes, information, and tools over the course of many years. This is frequently the case when functional groups focus on their own goals *versus* common outcomes across value streams. The ArchiSurance Digital Transformation calls for a new way of working in cross-functional teams that align with the flow of work and new technology being deployed.

The authors enjoyed reading the books “The Phoenix Project” [2] and “The Unicorn Project” [3] and have taken a similar approach for this Digital Customer Intimacy story; an easy read that provides guidance for a Digital Transformation. Many of The Open Group standards are used throughout the story to solve complications that arise during the ArchiSurance Digital Transformation. The TOGAF® framework, the IT4IT™ Reference Architecture, and the ArchiMate® modeling language are the primary standards featured.

The story will appeal to many roles in a company because it explains how Enterprise Architecture helps to characterize the work that needs to be accomplished by the organization to drive a transformation initiative. Many of the details and artifacts that were generated are provided in the Bonus Material.

At any time you can refer to the following list of the characters in the story to remind yourself of the roles they play in the transformation journey.

Cast of Characters, in Order of Appearance

Dr. Kathleen Stone	Chief Architect
Dick Masterson	Chief Information Officer (CIO)
Amy Lee	Agile Coach, External Consultant
Sven Stone	Kathleen's Husband
Tony Gonzales	Kathleen's Assistant
Terri Nichols	Business Architect: Develop Products
Rakesh Gupta	Business Architect: Market and Sell Products
Greg Morrison	Business Architect: Manage Policies and Claims
Philip Potter	Business Architect: Serve Customers
Chris Keller	Domain/Solution Architect: Big Data
Brad Nelson	Company President (CEO)
Carl Highfield	Domain/Solution Architect: Cloud
Sarah Condor	Head of Program Management Office (PMO)
Jamar Johnson	Domain/Solution Architect: IoT
Ben Cohen	Business Analyst
Hans Pickle	Program Manager
Craig Evans	Product Owner
Jasmine Williams	Customer Relations Manager
Nick Ross	Lead Business Architect
Brutus	The Dog
Bart Sanders	Security Guard
Fiona Hoekstra	Chief Financial Officer (CFO)
Steve Nunn	President and CEO of The Open Group

About the Authors

Stephanie Ramsay



Stephanie Ramsay (www.linkedin.com/in/stephanie-l-ramsay/) has worked for more than 30 years in Information and Digital Technology, with extensive experience in Service Delivery, Applications, and Infrastructure in three industries (Defense, Healthcare, Retail). Her education includes: a Bachelor of Science in Business and a Master's degree in Supply Chain Management and Architecture Certifications. She is a leading authority in Business Architecture and Product/Service Integration with strong competencies in Enterprise Architecture, Portfolio Management, Business Relationship Management, Service Management, Sourcing & Supplier Management, and Program Management. Stephanie is an active member of The Open Group IT4IT and Architecture Forums. Her hobbies include: writing, hiking, and travel.

Kees van den Brink



After being an officer in the Merchant Marines, Kees (www.linkedin.com/in/keesvandenbrink/) started his career in IT as a developer working in a team to maintain a network administration system. Over time, Kees has been a Sales Engineer, a Solution Architect, a Platform Architect, an Architecture Practice Lead, and an Engagement Lead. Currently, Kees works for ServiceNow and is managing a team of Platform Architects for the northern part of Europe. Throughout the larger part of his career, Kees has been working on solutions related to managing the different parts of the IT Department; for example, IT Project, Program & Portfolio Management, IT Service Management, and IT Operations Management.

Kees strongly believes IT should be regarded as a utility, just like electricity and water, enabling businesses to interact, optimize, and innovate. As a user/consumer of products with IT components, there should be no concern about how IT is delivered; it should be consumed according to choice. In his view, an important prerequisite is standardization in the way IT is delivered, fueled, for example,

by cloud and containerization. This means a shift to thinking in products and value streams and how they are used to help an organization on their digitalization journey. Kees is a strong believer, therefore, in initiatives that help to bring standardization to life, like the IT4IT Standard, which he helped to establish and maintain.

Sylvain Marie



Sylvain Marie (www.linkedin.com/in/sylvain-marie-b101341) has worked in Information Technology and Service Delivery for more than 30 years as a consultant. 15 years ago, he extended his experience in the field of Enterprise Architecture and is now a leading IT4IT architect. He is TOGAF Certified, certified in IT4IT Foundation and Business Architecture, and is an ITIL expert. He has been involved in ITSM and IT4IT consulting projects in major European companies. He also likes to share his experience in using the TOGAF and IT4IT Standards, and ITIL as a trainer and as an active member of The Open Group. During his free time, he likes to play jazz piano in his jazz quartet.

Dedications

To my co-workers who inspired content for this book and to my significant other, Scott, for his patience during the writing of it over the course of many weekends. ~ Stephanie

To Jolanda and Don who never complained when I decided to spend yet another hour locked away in my study, writing this book. ~ Kees

To all my colleagues and managers at Arismore then Accenture that gave me the opportunity to work on such interesting topics as the TOGAF and IT4T Standards. ~ Sylvain

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Acknowledgements

(Please note affiliations were current at the time of approval.)

The authors gratefully acknowledge the creation of the ArchiSurance company use-case and associated diagrams by:

- Marc Lankhorst, BiZZdesign

The authors gratefully acknowledge the contribution of the following people in the development of this document:

- Anna Adams, The Open Group
- Ben Heideveld, Shell
- Linda Kavanagh, The Open Group

The authors gratefully acknowledge the following reviewers of this document:

- Charles Betz, University of St. Thomas
- Erik van Busschbach, Invited Expert
- David Favelle, ValueFlow
- Chris Frost, Fujitsu
- Sonia Gonzalez, The Open Group
- Michiel Heijmans, ServiceNow
- J. Bryan Lail, Raytheon Technologies
- David Lounsbury, The Open Group
- Kirk Rasmussen, Raytheon Technologies
- Andy Ruth, Sustainable Evolution
- Michelle Supper, ServiceNow

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Chapter 1. Digital Customer Intimacy Strategy Kickoff

Dr. Kathleen Stone, Chief Architect for ArchiSurance, wakes up bright and early, before her alarm clock goes off, excited about her presentation at the town hall meeting later that day. Her moment to shine has finally arrived. Today she will be unveiling a new Business Architecture that will enable the company's digital strategy. Her Enterprise Architecture team has done a tremendous job working with the organization's stakeholders to build out the strategic plan. It has been an intense period, but Kathleen is happy with the objectives that will move the organization from functional silos to holistic operational value streams. The Business Architecture comprises a new organization map that aligns to the development of digital products and services within the value streams. She will tell the story of how this new organizational structure can change the company culture, moving it away from one with functional silos to one where teams work together toward common goals and business outcomes. This organizational work, with its accountability framework, is a key building block for Digital Transformation [4].

The first digital strategic theme identified in the architecture vision is "Digital Customer Intimacy". It will employ Big Data and Internet of Things (IoT) technologies to help support the organization in deeply understanding the company's customers and their wants and needs. The number one customer complaint for years has been that service calls get transferred from one department to the next and nobody seems to be able to help, or has accountability for dealing with problems. Customer orders and requests for service seem to get stuck unless they call and find someone to move things along. The cross-functional team structure Kathleen is proposing has the potential to eliminate thousands of hours a week of wait time in queues by reducing the need for specialist teams to exchange work orders and tickets. It will also unlock data and information that has been hidden away in disparate systems as functional groups begin to work across value streams. As the information begins to flow it will be easier to identify the common systems of record that are critical for product delivery. Application rationalization was also identified as an opportunity that will eliminate an enormous amount of duplication and redundancy. This will strengthen the company's *"shared customer insights by configuring the people, processes, and technology to learn what customers want"* [4]. This is all foundational work that must occur before deploying the new technologies that will digitize and transform the enterprise [4].

All of this has been characterized in the Business Architecture that Kathleen will be presenting in just a few hours. As she thinks about the phenomenal value the cross-functional structures and team of teams will bring ArchiSurance, she wonders why it has taken so long to get here. She knows the most important thing she can do today is to highlight the value to the consumer and the overall product satisfaction that can be gained very quickly once ArchiSurance begins to organize itself in cross-functional teams across key value streams.

Failed Digitalization

Still waiting for the alarm clock to ring, Kathleen's mind wanders back to the meeting she had with Dick Masterson, the CIO of the company, and the chain of events that changed her life just four weeks

ago. Kathleen had tried again to convince him to mandate the TOGAF® Architecture Development Method (ADM). She strongly believed that this would help her to get some order in the chaos of all the digital initiatives. She had been trying to get his attention on this topic, but their meetings were cancelled due to “other more pressing issues”. Little did Kathleen know that the ADM mandate was just a small issue. Finally, Kathleen was able to meet with Dick late in the afternoon on Tuesday ...

Kathleen remembers she opened the meeting with a thank you to Dick for taking the time to listen to her ideas on getting the digital initiatives in order. She noticed Dick appeared tired and asked him if she could buy him a cup of coffee. Dick agreed and they walked over to the cafeteria while Kathleen anxiously kept telling herself not to let this opportunity for getting architecture standards in place slip by!

They sat down at a table next to the window.

“You seem tired,” said Kathleen. “May I ask what’s on your mind?”

Dick was not normally the type to share his problems, but apparently this time was different.

“Actually, Kathleen, I am worried. Worried about my job. Remember a year ago, when the company announced the merger of the three companies? One of the main drivers was the opportunity to transform the business. Get the company into shape for the future. I guess you know the business decided to invest in a program of digitalization, which was driven by the Business Units themselves. All kinds of teams were organized, and every Business Unit started “digital product” projects. I can tell you, most of the projects had great ideas and had great starts, but after one year, none of these intended projects have realized any value. Since we invested 30% of the budget in new hardware to support all those projects, we have reached the end of the \$10 million budget. Apart from a large number of new racks in our data centers with idle running machines, we have nothing to show for it! And compounding that, there are now even more types of technology running in the data centers causing us to have to manage even greater complexity for no value. All this was justified on the premise of ‘we need to be Agile’ or ‘it’s the new industry favorite’, or ‘we must stay current’.”

Dick sighed and looked out the window. “From my perspective, in the past year we have managed to designate just about everything there is on the market as a corporate standard! Perhaps we can stop producing company technology standards and just say: ‘We have standardized on everything’. It is driving the Operations team to breaking point. I don’t think it will be long before we will have a Priority 1 (P1) incident that will disable the company for days simply because there is not enough time to both support the projects and maintain the technology environment they depend on. My only hope is that the P1 will not be a data leak.”

Looking 10 years older, Dick faced Kathleen again and continued. “I don’t need to explain to you that our company investors are starting to demand changes. Simply said, the digitalization project has failed, and our legacy systems are running on fumes. Unfortunately for me, everybody is pointing to me since it is a technology issue. Problem is, I had no control over the approvals and decisions being made. Each time I tried to get a project reviewed by my team before the business initiated it, the response was, ‘Oh, we’re Agile, so no need for you to review. If we need to adjust, we can do so because of our new way of working’. You know, our teams have been working very hard to implement Agile