

Supporting Business and IT Transformation

Using Orbus Software's Business and IT Transformation Suite to enable enterprise change



Summary

Catalyst

Organizations are under constant pressure to develop and implement strategy and deliver services that can enable business and IT transformation. An architectural approach can offer a blueprint structure within which organizations can plan, manage the transition, and execute the required changes. However, a difficult dilemma facing IT management is the selection of the right software tools to be used by the organization, as a whole, to enable transformation.

Ovum view

An architectural approach to transformation needs to address two main aspects. There is the ability to support the various capabilities and initiatives within the organization, and the enterprise architecture management capability consisting of the maintenance and administration of enterprise architecture. Some organizations focus exclusively on a framework and the creation of a model, to the detriment of providing support for other needs and roles in the enterprise. It is important for organizations to focus on both "doing the right things" and "doing things right."

The approach should provide the essential views for the communication, interpretation, and implementation of value drivers throughout the organization and enable the transformation to a service-centric IT environment. This can be achieved through the creation of a number of interconnected architectural views, with the various models breaking the enterprise down into manageable areas and different levels of abstraction, usually including strategic, conceptual, logical, and technical.

Organizations are becoming more reliant on technology to facilitate decision-making and transformation, placing greater emphasis on better understanding the many components that make up the business. The creation of views defining business information and processes gives a much-improved insight into how the business operates, enabling effective utilization of organizational assets, resources, and people through the ability to make better informed decisions, which in turn improves efficiency. An architectural repository provides a collaborative platform for "stakeholders" across the organization, from strategic to tactical decision-makers.

Organizations would be ill-advised to proceed with business and IT transformation without utilizing a flexible modeling toolset that is able to meet their requirements. A common repository is vital to provide a shared information source for everyone involved. Also important is the ability to base the approach on common methodologies, frameworks, and standards, and to customize the metadata to fit each organization's own situation. However, it is essential that the tools and frameworks do not become the primary focus, and that they remain enablers of change.

Business and IT transformation requires the structured collaboration of many people: architects, contributors, and an extensive array of business users, who may have little formal training or experience. Finding a mechanism that enables all stakeholders to collaborate constructively, without the need for extensive retraining and skills acquisition, can be problematic. Orbus has approached the resolution to this problem by developing a fully integrated Microsoft-based platform that exploits existing skills and Microsoft Office products, particularly Visio, which becomes the modeling GUI. It is this ease of use and speed of setup that enables organizations or teams to "start fast" and become productive immediately.

Key messages

- An architectural approach is an important enabler of business and IT transformation.
- Enterprise modeling across core business and IT domains, such as enterprise architecture and strategic alignment, IT portfolio management, project portfolio management, governance risk and compliance, business process analysis, and ERP process management, helps to enable organizational and IT change.
- The provision of a common repository and the ability to view information in each stakeholder's own "language" greatly assists decision support and collaboration.
- Tools should be able to support a whole array of management domains, requirements, initiatives, and roles.
- Modeling software must cater for the common standards and frameworks and their convergence, and enable "fast customization" to suit the needs of each enterprise. Frameworks should not be a constraint but a solid starting point.

A vision for business and IT transformation

Core capabilities that can enable change

All organizations today are undergoing transformation. Government and public sector bodies are aiming to move to the cloud to keep costs under control and provide greater flexibility. Large enterprises are facing the challenges of globalization and digitalization. Manufacturers need to manage supply chains better. Change is inevitable, and is hard to cope with, but it is the norm. The ability to achieve strategic goals is a direct function of managing business change and the requisite change in IT needs. Orbus Software identifies six core management domains that enable organizations to successfully transform their business and IT (see Figure 1).

To be of relevance, these domains need to interact with one another, and to remain competitive organizations must urgently address the lack of visibility and understanding of the enterprise and IT. These issues are directly affecting the organization's ability to transform. Managing technology, demand, project, strategy, and application portfolios in a coordinated fashion is essential, as it recognizes and addresses the issues of creating an integrated environment from elements that have traditionally operated individually. Making an architectural approach integral with strategy, process management, governance, portfolio management, and delivery will help to enable both business and IT transformation. It is increasingly necessary for companies to have one common platform and repository that supports these six increasingly interconnected domains.

Figure 1: Converging business and IT transformation domains supported by iServer



Source: Orbus Software

In addition, by adopting reference architectures, standards, and frameworks, organizations can accelerate the impact these domains have on the transformation of business and IT. De facto best-practice standards and notations have emerged within, and indeed across, these management domains, with examples including IT4IT, TOGAF, ArchiMate, COBIT, ITIL, BPMN, and PRINCE2. As these management practices have evolved, the people, processes, and technology involved have overlapped and integrated. So in reality, this is not a set of distinct management domains and standards; they are all converging.

IT4IT Version 2.0 was released by The Open Group in late 2015. It is a reference architecture for managing the business of IT, including a formal IT operating model known as the IT Value Chain. IT4IT sits at the center of the Orbus vision, because it addresses the range of activities necessary for establishing a high-performing, business-focused IT function that delivers business outcomes. Furthermore, IT4IT has been developed specifically to complement and integrate with a range of existing standards, including TOGAF, ArchiMate, ITIL, and COBIT, which effectively endorses the Orbus vision of related and converging domains and standards.

iServer Business and IT Transformation Suite

Platform capabilities

Orbus Software's Business and IT Transformation Suite offers organizations a collaborative software platform and enterprise modeling environment that integrates and supports rapidly converging

business and IT management domains. The capability within these convergent domains is supported by iServer platform capabilities, which include complete integration with Microsoft Visio; a central repository for all enterprise architecture artifacts, business process models, and documentation; and a range of tools for visualization, analysis, and decision-making.

Figure 2: Business and IT Transformation Suite capabilities

	EA & Strategic Alignment	Governance, Risk and Compliance	IT Portfolio Management	Project Portfolio Management	Business Process Analysis	ERP Process Management
Collaboration Platform	Enhanced Visio Modeling		Central Repository		Document Management	Decision Analysis Tools
Learning	Online Help and Documentation		Product Accreditation		Standards Certification	Best Practice Resources
Standards Support	TOGAF® 9.1		IT4IT®		COBIT 5	ITIL® 2011
Integration	CMDB		BPMS		SAP	Legacy Tools
Communication	Reporting		Publishing			Presentation

Source: Orbus Software

Microsoft integration

The principle competitive differentiator of the suite is in using and extending the tools already established and preferred by users: Microsoft Visio for diagrams, Excel for lists, Word for documentation, and PowerPoint for presentations. A large number of organizations worldwide currently use Microsoft Visio and Office to document business processes and enterprise architecture. In addition, Visio is used by an estimated 25 million users globally.

iServer allows organizations to bring information into a collaborative repository-based environment quickly, without the need to translate the content into a proprietary format. This enables iServer to provide a familiar, easy-to-use environment without extended training, and facilitates fast delivery to show immediate return and allow the use of the information by a much wider audience.

The use of the Microsoft environment makes the solution much more sustainable in the longer term, because there is less training required, the cost of ongoing maintenance is lower, and a larger number of users are able to utilize the tool, minimizing any impact from the loss of skilled practitioners. Using the suite can also mitigate a major barrier to enterprise architecture adoption, which is the inability to quickly provide useful deliverables and show value from the approach. This is overcome by iServer through minimal training requirements, ease of setup, and ease of use.

Flexibility

iServer is extremely flexible, and in addition to the many standards supported out of the box, it can be easily and quickly configured to use any notation, framework, or meta model. The flexibility of the meta model is crucial – it needs to be easily adaptable to reflect the maturity of the architecture so

that validation rules, relationships, diagramming standards, and attributes can be applied and enforced incrementally.

Many other tools require a lengthy data migration exercise, with decisions on the meta model and standards to be made up front. In developing the solution, Orbus has recognized that different standards and sets of rules need to be developed and enforced for each organization. The solution allows this to be undertaken under the control of the organization's administrators rather than by costly external consultants modifying the modeling software or metadata.

Data capture

The existing diagrams and documents may not be perfect, complete, or consistent, but this information can be imported immediately into the solution. Existing content in Office/Visio can be reused, imported, quickly updated, and extended, which together with the flexibility and minimal training means that you can be up and running in no time, delivering value on your project. Standardization and consistency are important, but this does not have to be achieved on day one. Use of templates/standards/metadata can be enforced within the solution as usage evolves, but at the start it can be very useful to have an initial view of the current situation.

Support for common standards, frameworks, methodologies, and notations

The suite provides out-of-the-box support for frameworks and standards including IT4IT, TOGAF, ArchiMate, BPMN, ITIL, COBIT and PRINCE2 and can be configured to support any framework, meta model, or notation. This can be achieved through the user interface without the need for additional configuration services. Most recently, iServer support for IT4IT, launched in January 2016, contains an embedded reference architecture and value chain-based methodology for managing the business of IT. The use of IT4IT is supported by the flexible iServer repository.

Communication

All types of content can be published, and hyperlinks to other published objects are generated automatically from relationships. Once the content is published, a web browser allows any user to view the drawings, documents, hierarchy, links, properties, custom attributes, and issues. The solution has a set of business-friendly publishing tools that are crucial for stakeholder engagement. These include an online portal with live web access to the repository, publication tools for HTML and Microsoft PowerPoint, Microsoft Word document generation, and online dashboards.

Integration

A set of integration modules allows users to import information from other tools directly into the repository. The solution also integrates with a number of third-party tools, including business process management suites (BPMS), workflow, SAP, data modeling, and business intelligence (BI) tools. Furthermore, iServer BI Connect provides a powerful, easy to use, and customizable reporting/dashboard capability.

Learning and support

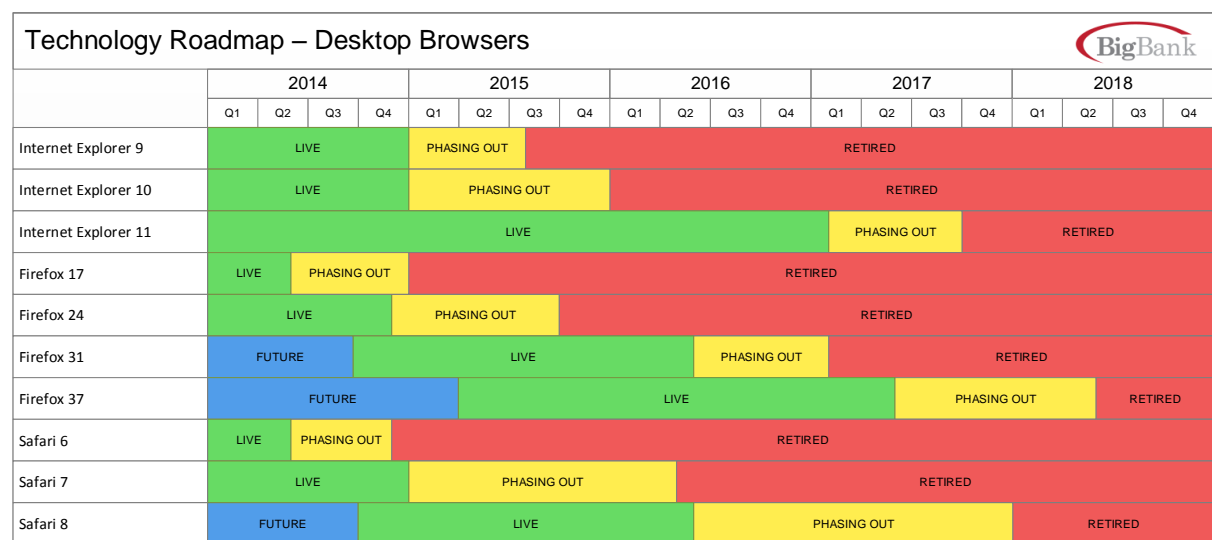
The suite offers an embedded Learning Center, which includes product accreditation e-learning courses, standards certification (for example BPMN 2.0), online help, and other learning resources. Additionally, Orbus provides comprehensive user support. Users raise support tickets or enhancement requests directly via the Learning Center interface. Interestingly, Orbus publishes the customer feedback on its support process on its website.

Supporting business and IT transformation

Support for major technology trends

Transition initiatives usually involve the adoption of new technology. Enterprise architecture offers a useful approach and views with which IT organizations can engage with the business, improve decision-making, and address statutory and corporate governance requirements. The technique enables better planning and the ability to prove compliance. It also provides more awareness of the value of technology investments and helps to provide understanding of the complexity found in many IT and enterprise environments. Views, such as technology reference architecture, SWOT analysis, customer journey map, strategy on a page, and roadmap (see Figure 3), all help to gain an understanding of the impact of new technology and transformation initiatives.

Figure 3: Technology roadmap

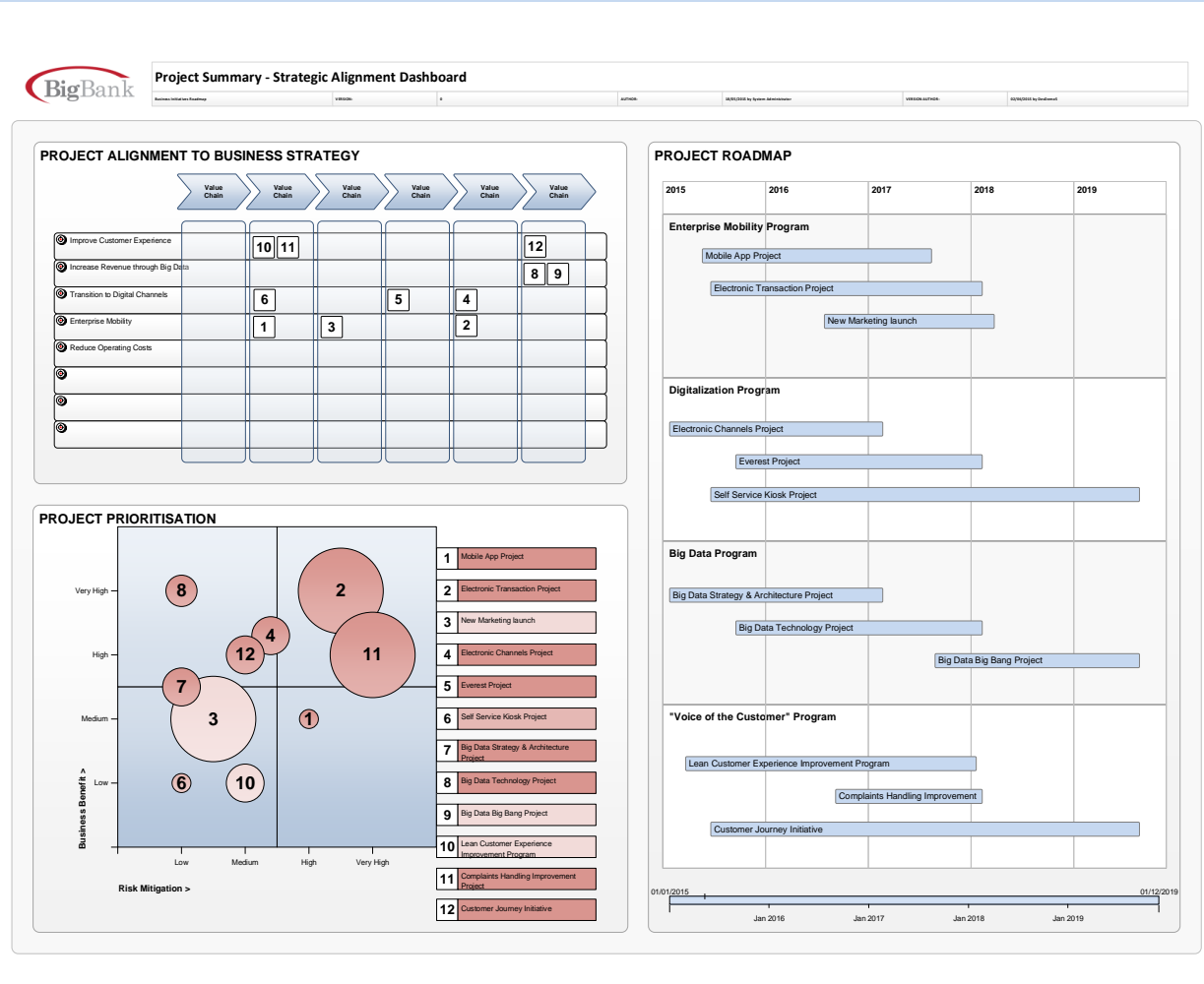


Source: Orbus Software (generated using iServer)

Trend: strategic alignment

The demands of the corporation and governmental organizations require complex planning initiatives supported by an "architectural" business and IT strategy. This necessarily involves the adoption of an architectural approach, rather than the use of tactical undertakings where there is a possibility of reverting back to a siloed mentality, because there is no mechanism in place to interpret strategy and control delivery through the use of architecture, policies, patterns, and common standards. Many architecture modeling solutions have previously failed to meet the needs of an important constituency – the senior business decision-maker. They often lack a way of presenting a sufficiently abstract and easy-to-change view of change, especially when it comes to the aggregation and analysis of data relating to architecture, strategy, and operations. Dashboards (see Figure 4) can provide the visibility required by management to understand the impact of change and to ensure transformation is on track.

Figure 4: Strategic alignment dashboard

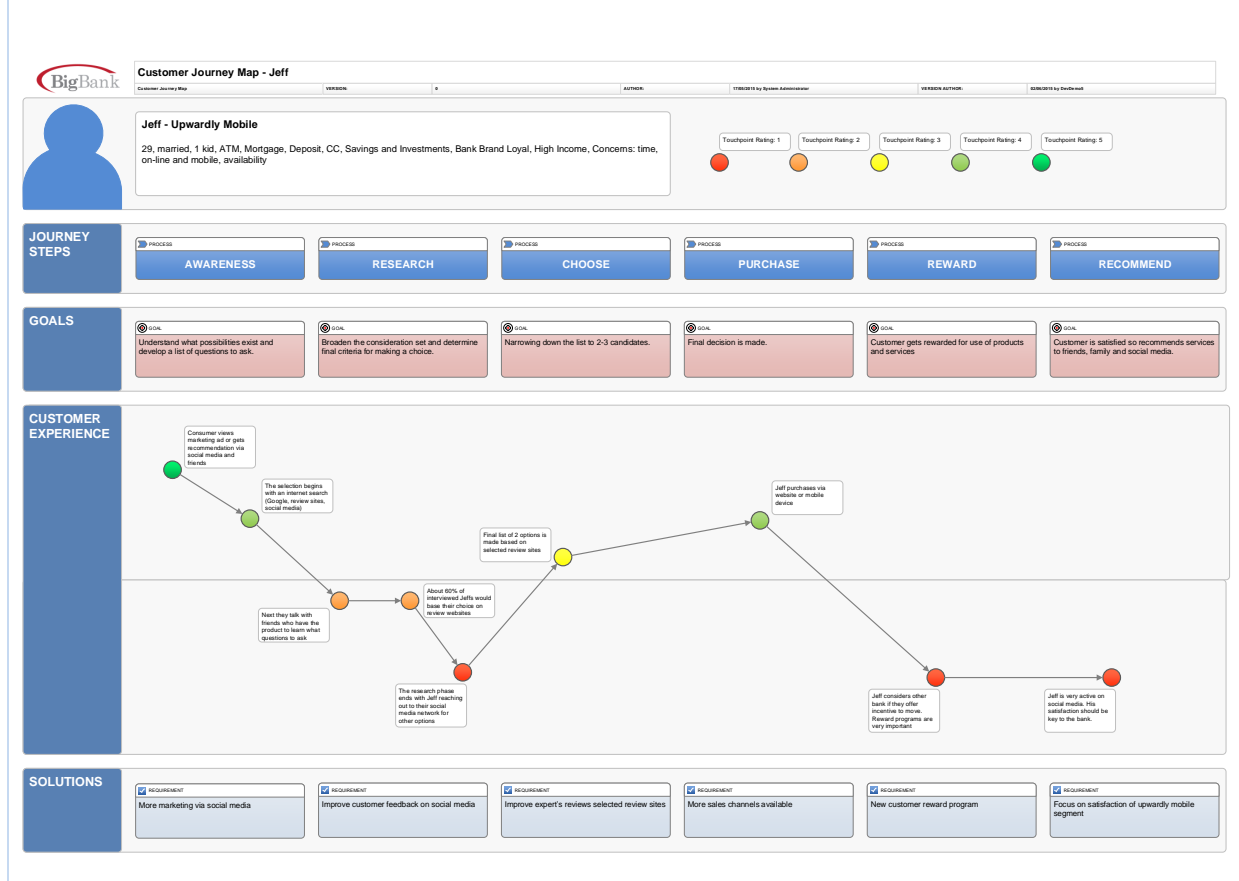


Source: Orbus Software (generated using iServer)

Trend: customer experience

The rise of the empowered and often better-informed customer has dramatically shifted the power balance from organizations to customers. Ovum research has identified this shift in power to the customer; 71% of enterprises state that their number-one business challenge across all geographies and industries is to improve customer satisfaction. Customers also expect more from organizations and are no longer prepared to wait for information or navigate the internal silos endemic in many large enterprises. They expect consistency, ease, speed, and transparency, irrespective of how they choose to interact with an organization, be that in person, at a branch, in a store, or via an increasing variety of digital channels. A common goal for many organizations is to improve the customer experience. A view that can support this objective is the customer journey map.

Figure 5: Customer journey map

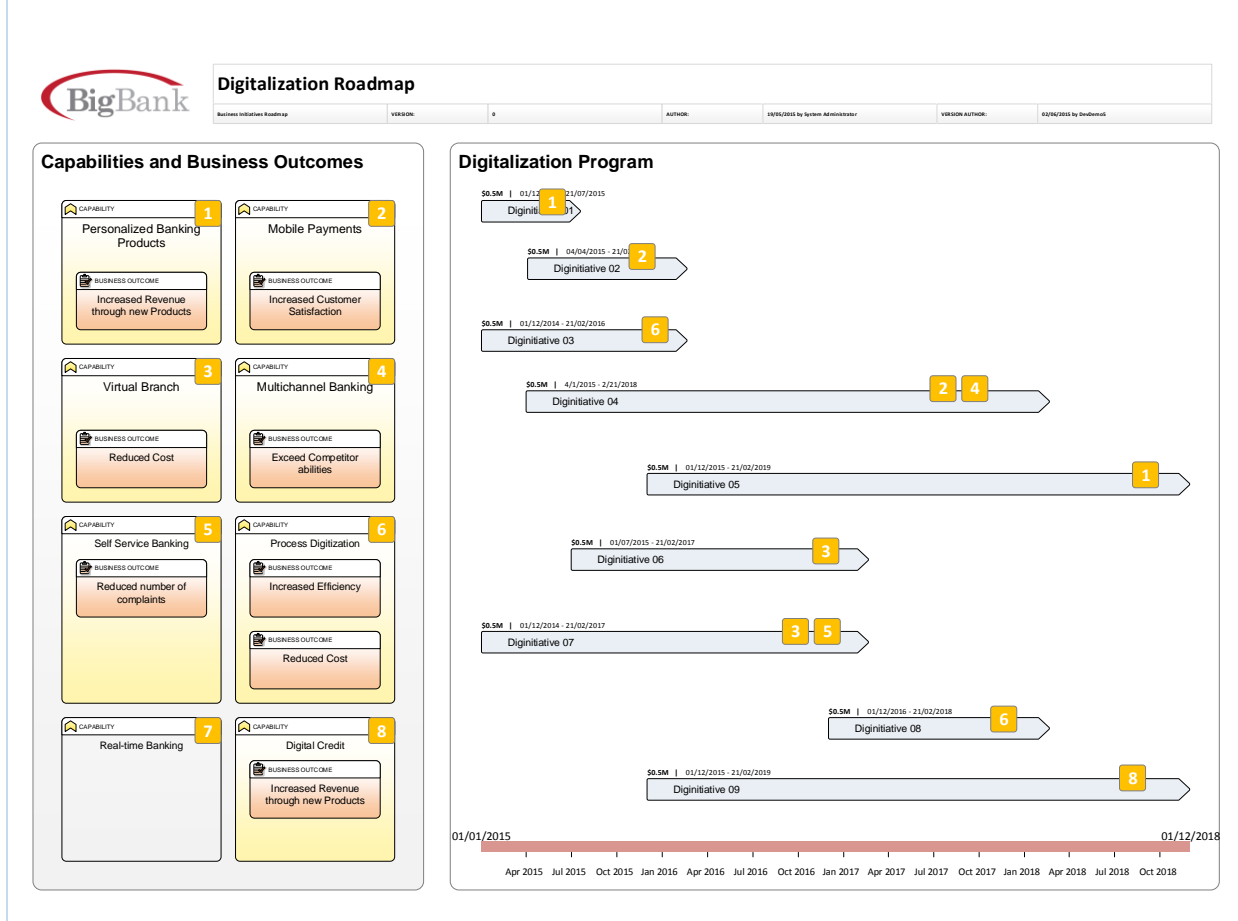


Source: Orbus Software (generated using iServer)

Trend: digitalization

Enterprises have suffered from inertia to change, and the habitual reactive way of responding to new transformation requirements often leads to a plethora of siloed solutions that add to complexity and are difficult to maintain. Change is inevitable, and organizations need to adapt and effectively respond to the challenges created by the rapid rise of digitalization. However, given the rate at which digitalization is driving changes in business processes and customer engagement models, organizations require visibility of the impact and timelines dictated by the adoption of technologies and new processes, often in the form of a digitalization roadmap.

Figure 6: Digitalization roadmap

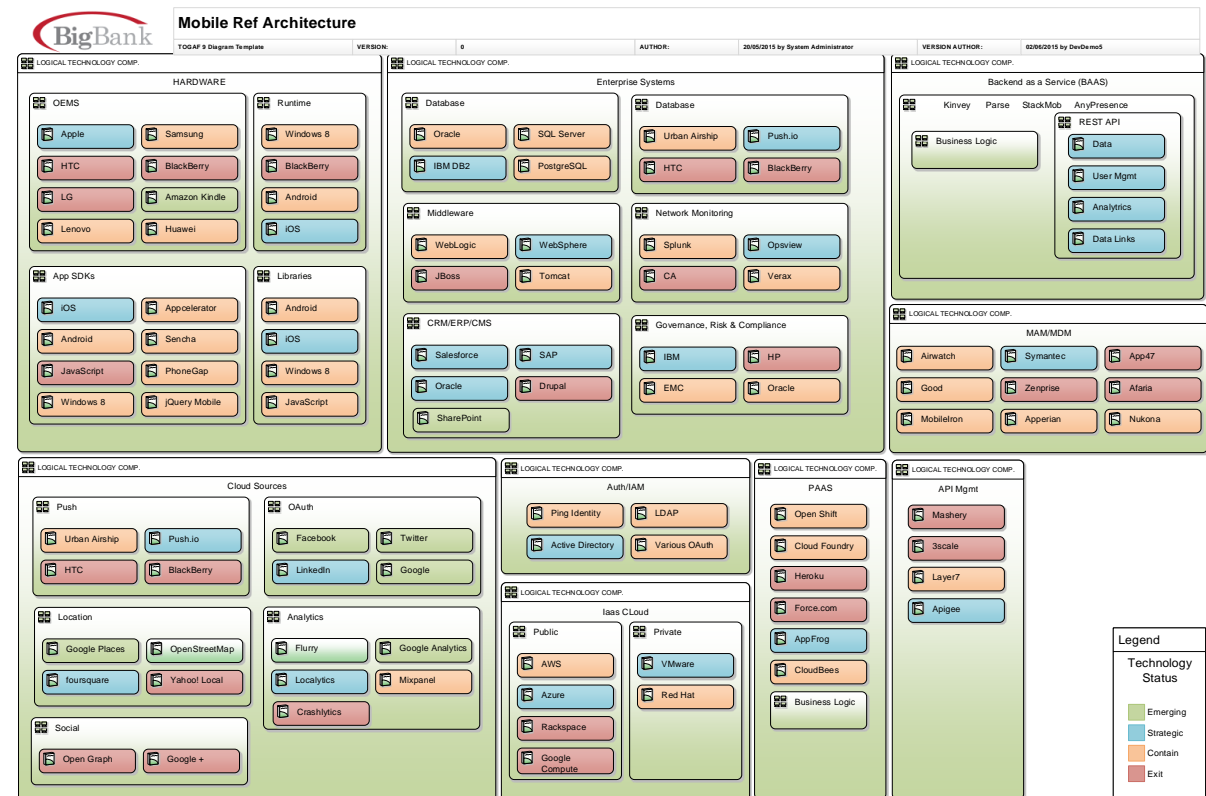


Source: Orbus Software (generated using iServer)

Trend: mobile

Enterprises are realizing the business benefits of mobility and have incorporated mobile technologies into their transformation strategies. With remote working becoming more popular and the amount of work conducted outside of the office environment increasing, the solutions demanded are becoming more complex. There is now a need for an architectural approach to provide a foundation on which mobile applications are capable of enabling process improvement and extending the reach of the enterprise. A reference architecture diagram is a useful model to gain understanding of new and emerging technologies.

Figure 7: Mobile reference architecture

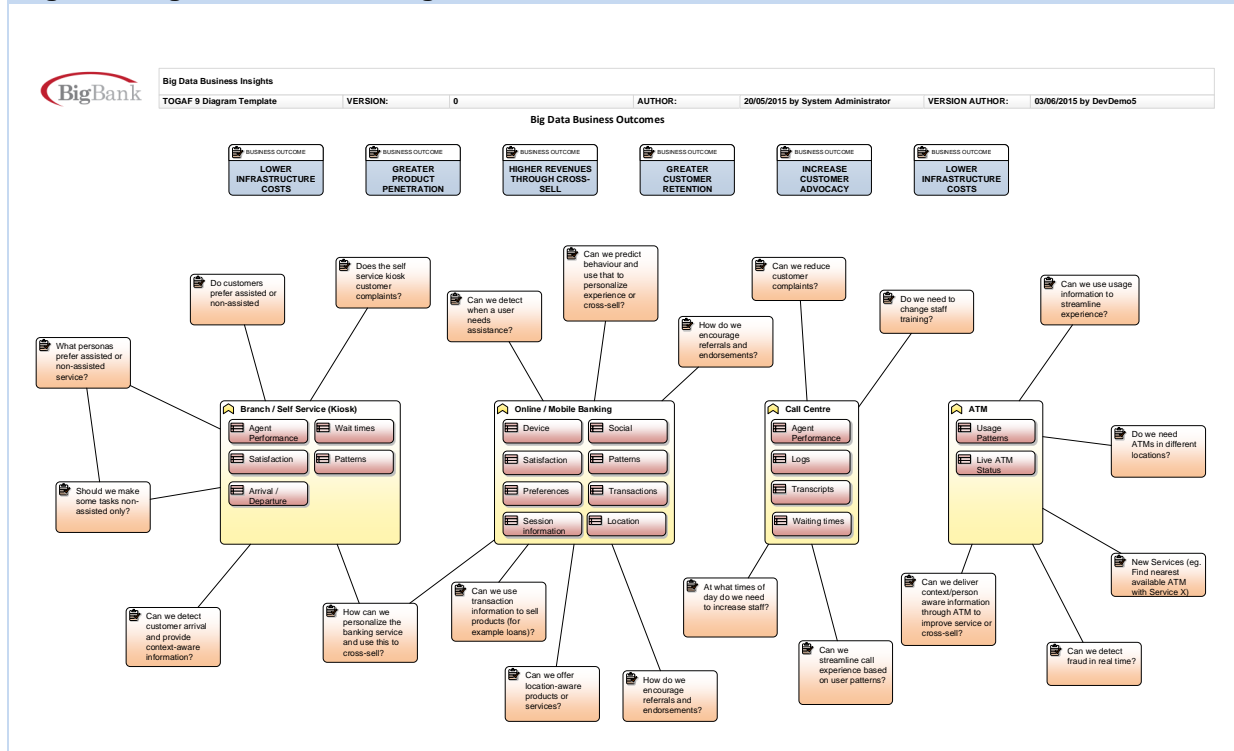


Source: Orbus Software (generated using iServer)

Trend: big data

A growing number of organizations are adopting BI and analytics as a means to better understand their businesses and the customers they serve. Organizations are not only interested in using analytics to support their core financial management processes, but are also increasingly investing in BI and analytics to gain a better overall view of the enterprise's performance, to gather customer intelligence, and to understand their supply chain. While big data certainly holds significant potential value for organizations, business leaders are increasingly conscious of the fact that they "do not know what they know" and that valuable data exists in pockets across the organization that, if properly marshaled, could transform the way in which key decisions are made. To this end, a big data business insights view is particularly valuable.

Figure 8: Big data business insights



Source: Orbus Software (generated using iServer)

Support for architecture roles and domains

Involving all stakeholders in transformation is both an essential and an ongoing aim for any organization. People and processes are inextricably interlinked, and there are two disruption points that have to be faced. Firstly, there is the disruption caused by trying to understand and map the current and future situations. Secondly, there is the issue of what to do when transformation is instigated. It is at this level that the human element becomes indispensable to the organization. Therefore, a primary objective when undergoing transformational change is to ensure that different domain architects (and architectural teams) have the information to make the right decisions.

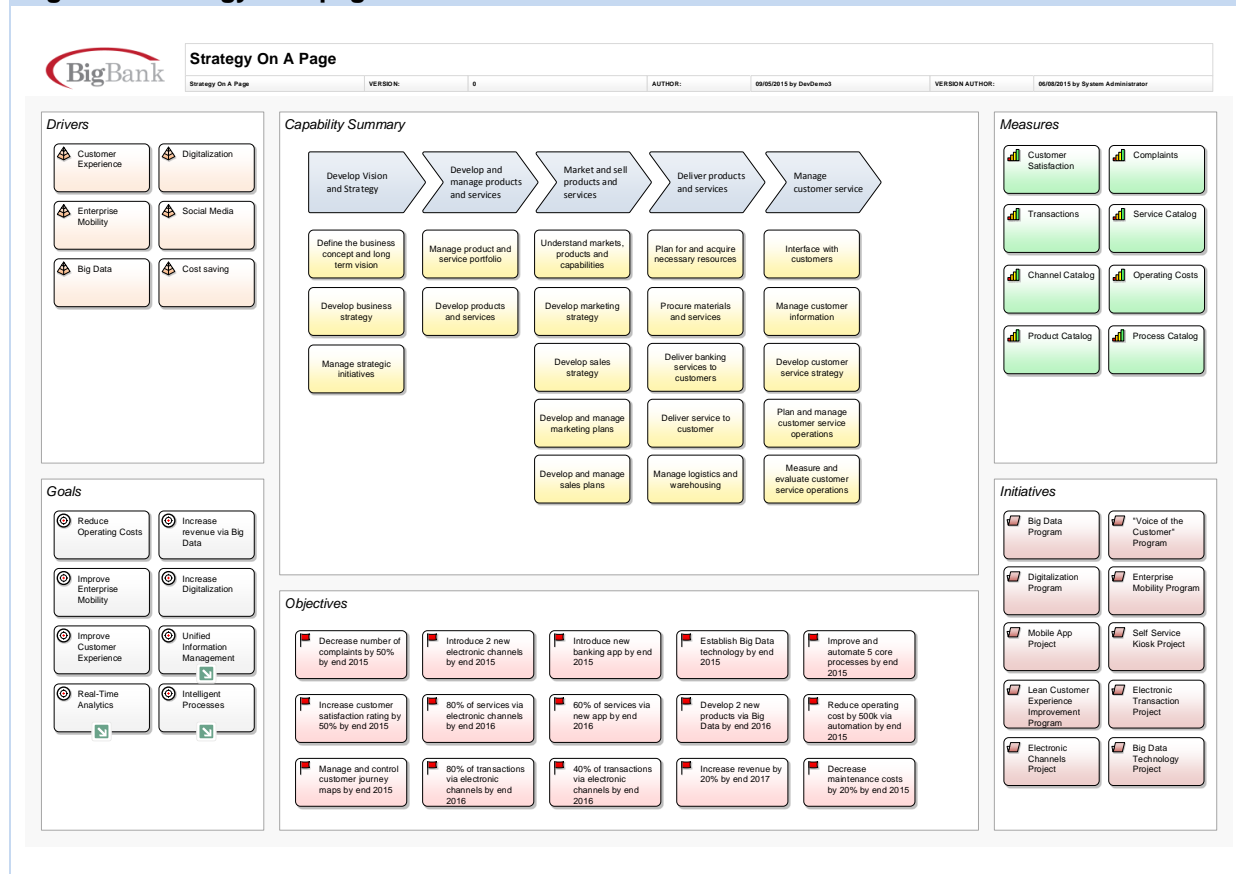
Business architect

Although creativity plays an important part in developing a transformation strategy, the increasingly digital nature of business in many sectors makes it imperative for the business architect to develop an understanding of the linkage between business capabilities, strategy, and technology. The business architect needs to ascertain the line of sight between the business goals and objectives and the more formal representations of business capabilities, business processes, data structures, and supporting infrastructure that are used by the organization.

There are a number of views that can help the business architect map business capabilities, validate business models, and develop operating models to meet business objectives, including strategy on a page, business model canvas, business capability landscape, business operating model, and roadmaps. These views can also provide guidance and input to all the other architecture domains. For example, a "strategy on a page" can be used to summarize the business need from an executive viewpoint. This consists of a capability summary that includes a value chain explaining the process or activities by which a company adds value, the enterprise strategy (a combination of drivers, goals, and objectives), the initiatives that act as enablers for capabilities to meet objectives (usually in the

form of projects and programs), and the measures that are effectively the KPIs that track how the initiatives are performing to meet the set objectives.

Figure 9: Strategy on a page



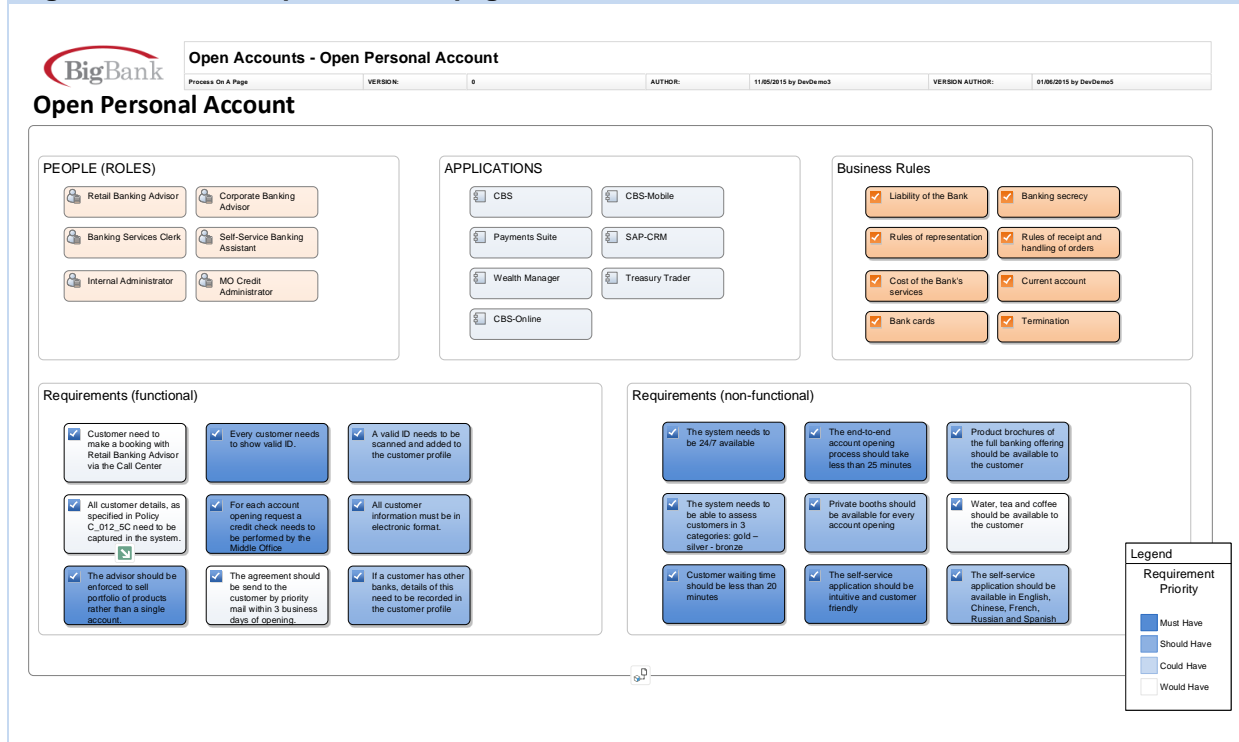
Source: Orbus Software (generated using iServer)

Business process architect

Becoming a process-centric organization is crucial. It is clear that business processes matter, and that organizations want to be capable of quickly modifying a process when necessary, so the existence of a business process layer that drives changes in applications and technology as the organization adapts is vital. The responsibilities of the business process architect focus on ensuring that business processes reflect the enterprise operations, and that they are efficient. This requires the ability to address changes in the process landscape by understanding the linkage between business objectives, capabilities, and process, and by drawing together the business logic and data sources from multiple underlying systems.

For example, there are a number of views that will help the business process architect discover high-level business processes more quickly, describe their relationships more consistently, and manage their evolution more smoothly. These include value stream map, process landscape, and process maturity assessment. The "business process on a page" view can summarize the main components of the process, including the people who perform the process, the applications that support the process, any business rules that may affect the process, and functional and non-functional requirements.

Figure 10: Business process on a page



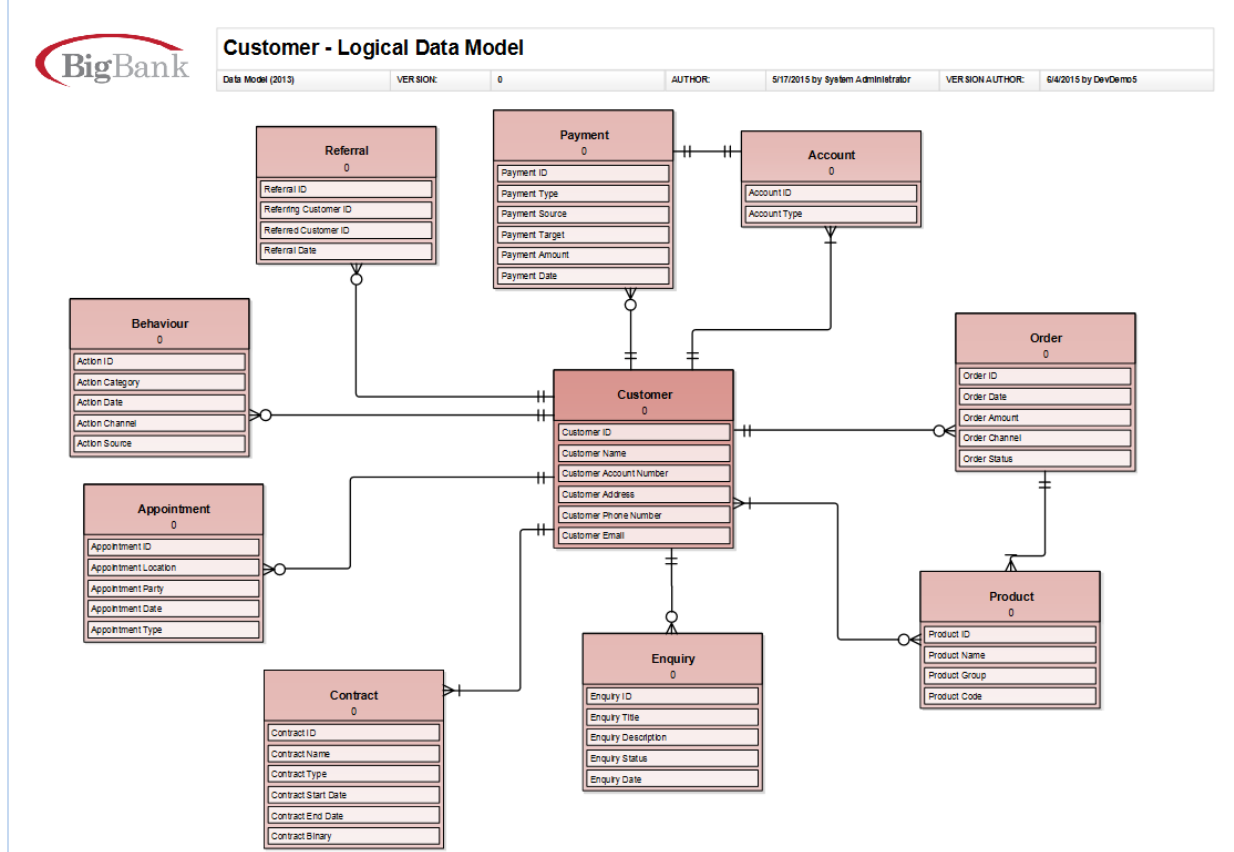
Source: Orbus Software (generated using iServer)

Data/information architect

Information, or more accurately information flow, is the lifeblood of any organization, underpinned by cultural and operational behavior. It is these beliefs and cultural norms that the architect must understand and ensure the technology supports. These operational norms provide the foundations from which information/data architecture and the relevant views, such as conceptual, logical, and physical data models, can be constructed by the information architect, enabling insight to support business strategy and management of the data lifecycle and security.

Additional responsibilities include ensuring the quality of business information and catering for changing information needs. Views that are applicable to supporting this domain include the data flow and data security diagrams. The logical data model describes the information used by the business independent of technology, and can be used by business architects to gain an understanding of the data requirements.

Figure 11: Logical data model



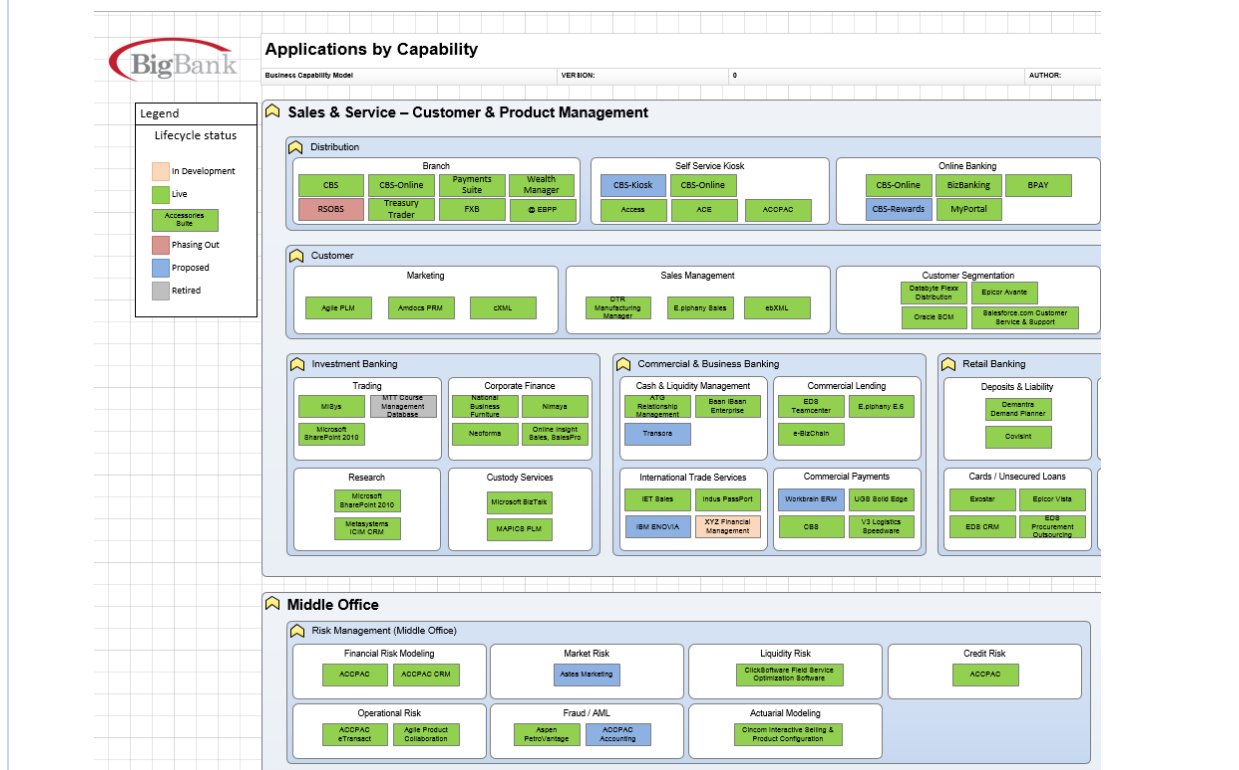
Source: Orbus Software (generated using iServer)

Application architect

Architecture in application development is going through a transition due to the adoption of Agile methodologies. Whereas the traditional waterfall process has all the architecture produced at the start of a project, Agile practices necessitate an evolutionary approach, with flexibility in terms of how much architecture is done up front. In addition, new methods of supporting architecture decision-making herald improvements in reducing architecture risk. Architecture decision-making has serious consequences for the subsequent development of a project, and new ideas are emerging for evaluating the optimum architectural choice.

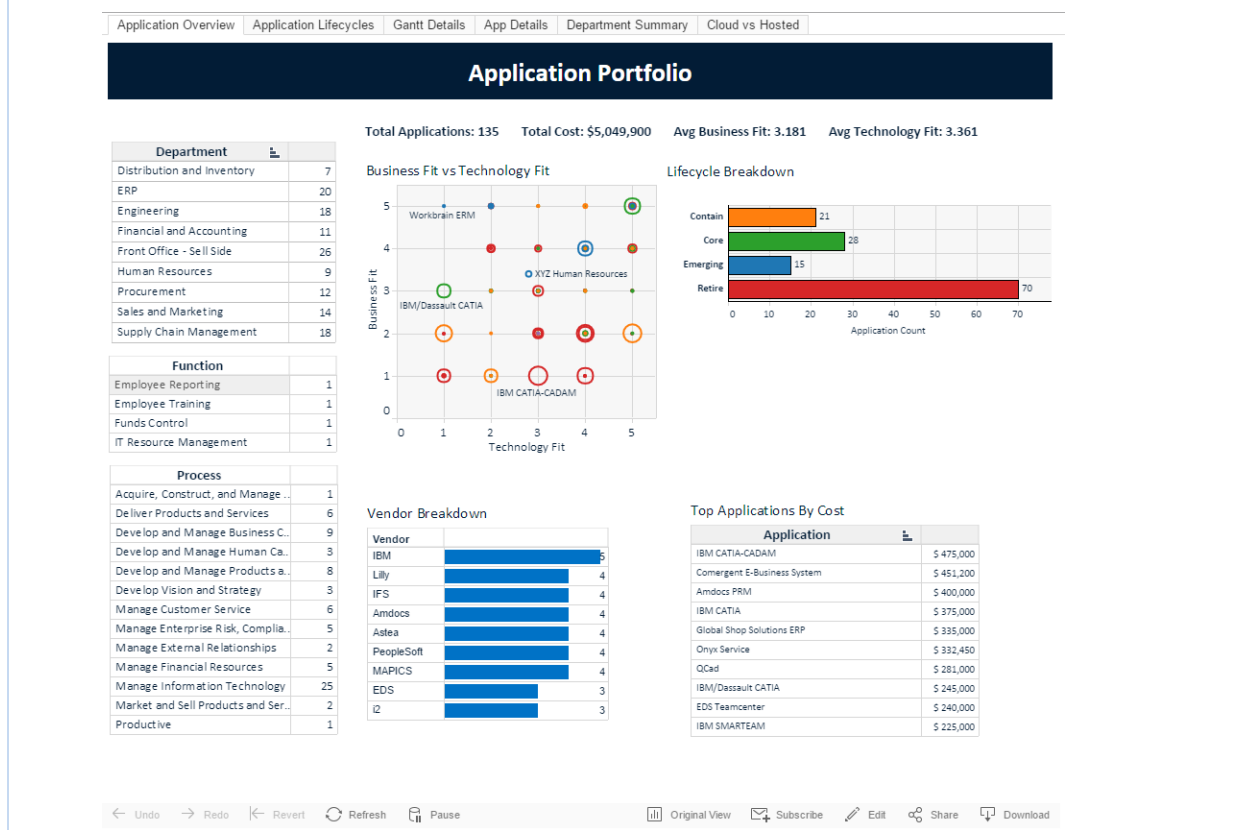
The application architect needs standards and principles to be in place to enable the development of cost-effective and scalable applications, as well as applications that meet business and technical requirements. For example, an important aspect of the role is to understand which capabilities are dependent on which applications (see Figure 12). At the same time, it is also important to have an understanding of the application portfolio. The availability of application portfolio views, either in a repository as a dashboard (see Figure 13) or patterns, can guide the application architect and software development teams. The ability to analyze the application portfolio based on a number of criteria helps informed choices to be made on transformation and rationalization, not only by application architects, but also by other stakeholders such as the CIO, who will be concerned with cost reduction across the application portfolio.

Figure 12: Applications by capability



Source: Orbus Software (generated using iServer and Tableau)

Figure 13: Application portfolio view



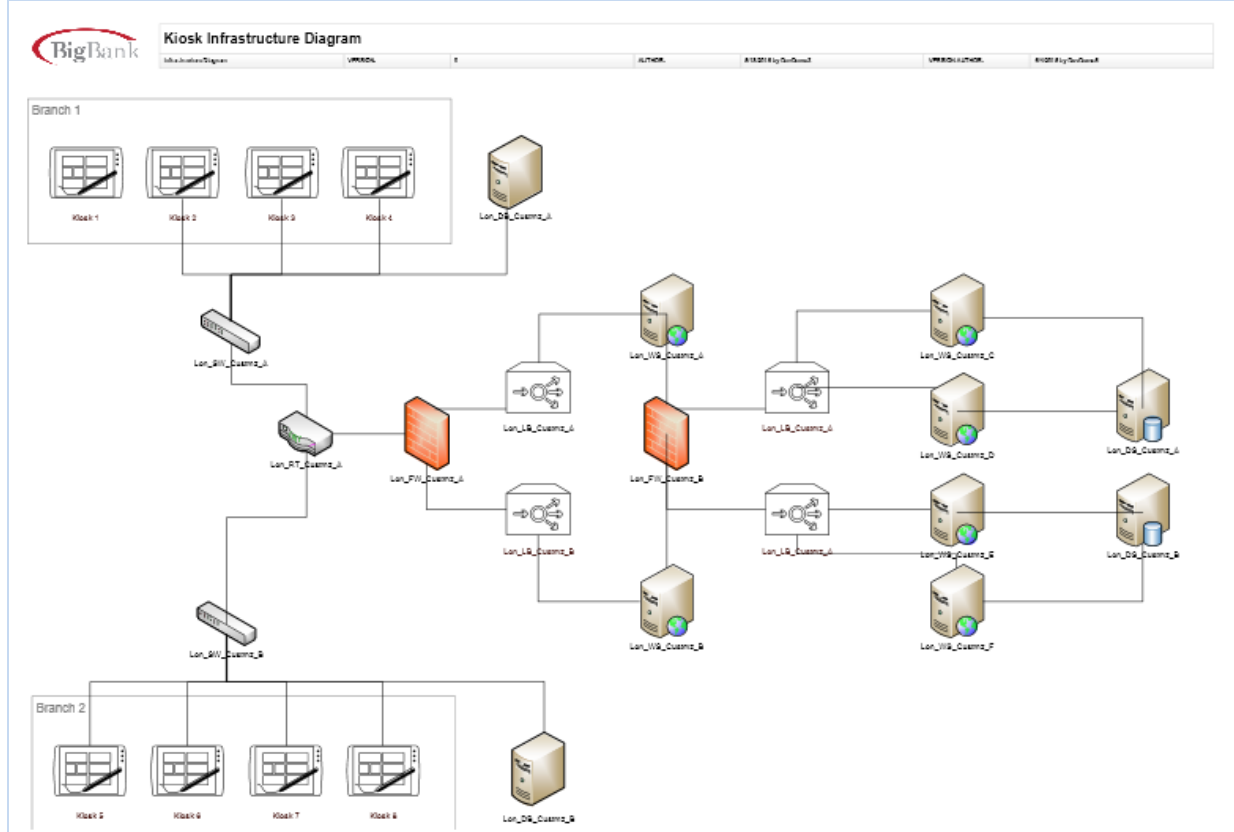
Source: Orbus Software (generated using iServer and Tableau)

Infrastructure/platform architect

As the IT environment becomes increasingly complex, one challenge is to understand how all the different technologies relate to one another. The demand for increased velocity of business in terms of both process and development has created an environment in which IT is not a back-office function, but front and center in the new digital economy. However, all of this still relies on the employees and culture of the organization, and it is the understanding of the merging of new technologies, new ways of working, and new skills that is the cornerstone of the infrastructure architect's role.

The infrastructure architect is looking to design scalable and reliable platforms, which increasingly has to encompass cloud architecture. The complex technology landscape of many enterprises needs to be understood, along with the administration of the various hardware lifecycles. The infrastructure also needs to support the requirements of applications, data, and security. Views that can assist the infrastructure architect include infrastructure diagram, technology roadmap, and technical reference model.

Figure 14: Infrastructure diagram



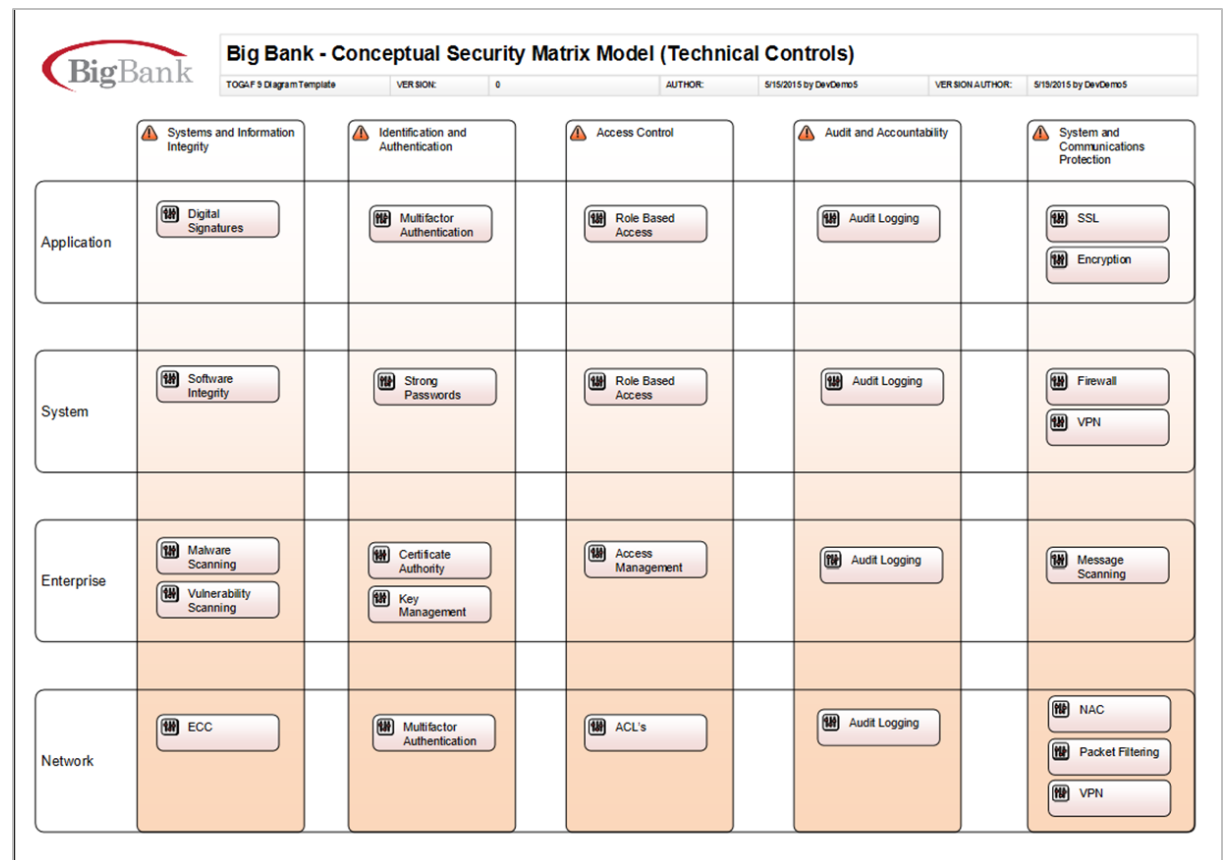
Source: Orbus Software (generated using iServer)

Security architect

Most enterprises are adopting an approach of continual improvement when it comes to security, and are evolving to include all the required elements – as directed by their security strategy – over a reasonable time span, dictated by the individual circumstances and risk appetite of the organization. But make no mistake, organizations that fail to put in place conditions conducive to the development of an enterprise-wide security culture, allied with a flexible security architecture, are in grave danger of exposing the enterprise to unacceptable risks and compliance issues.

The security architect is concerned with identifying the security risks within operations and those associated with the adoption of new technologies. There is also the need to provide advice on how solutions and data are designed to prevent vulnerabilities. It is useful to have an understanding of the various security solutions available, particularly with respect to their applicability to different areas of the IT landscape. A security matrix model would be useful in this respect.

Figure 15: Security matrix model



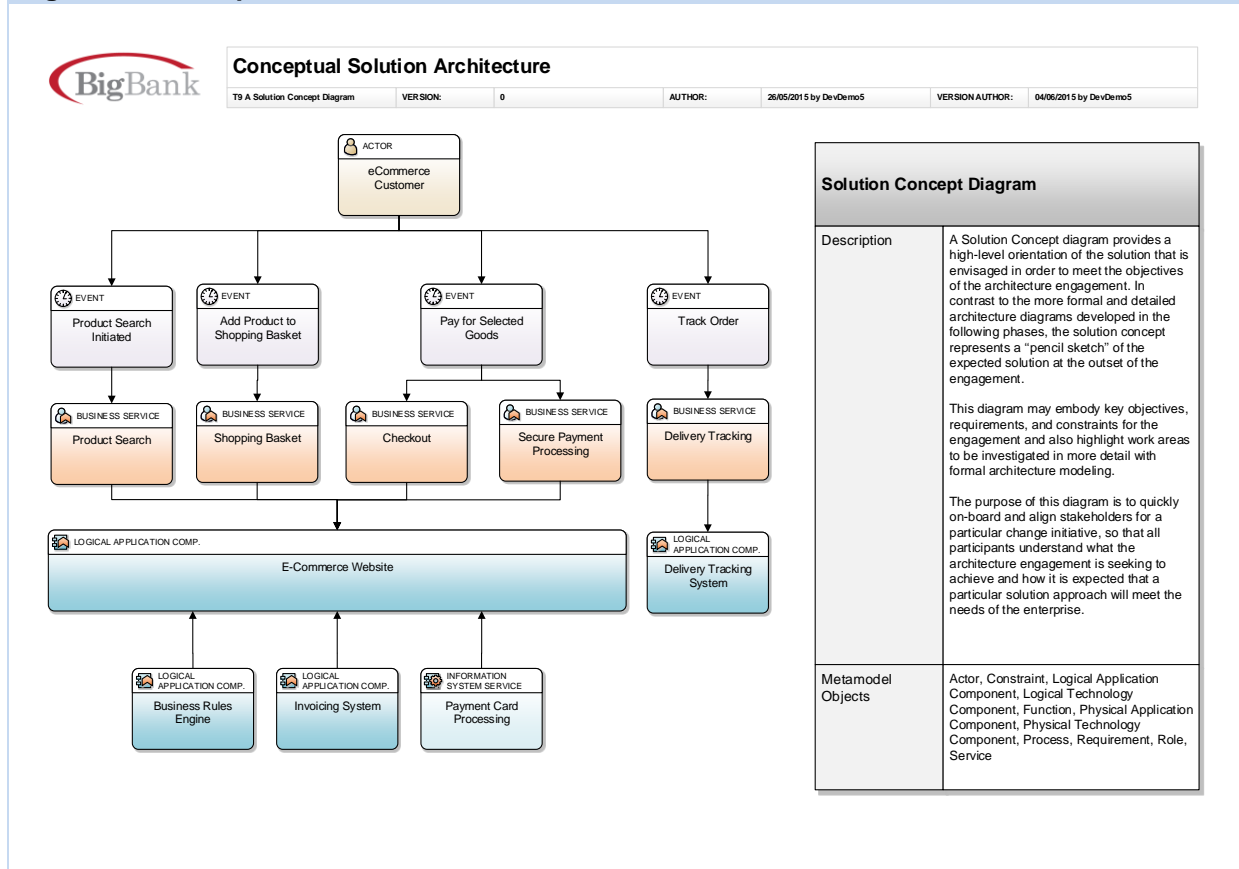
Source: Orbus Software (generated using iServer)

Solution architect

An effective business and IT understanding is necessary to achieve successful solution architecture. Solution architecture should be driven by business requirements so that there is synergy between technical design and business needs. To build a strong business case for a solution, solution architects need to identify the current and near-term business needs and map these to the potential benefits of a solution.

A solution architect is looking to design service-centric, flexible, and scalable solutions. Important views include solution business context, baseline/target architecture, solution gap analysis, solution capability delivery map, and solution requirements catalog. In addition, a solution architect requires access to standards, reference architectures, and patterns to ensure the proposed solution fits with the current and future architectures.

Figure 16: Conceptual solution architecture



Source: Orbus Software (generated using iServer)

Orbus Software

Company overview

Orbus Software is headquartered in London, and was founded in 2004. The company is an independent software vendor and a global provider of software and services for business and IT transformation. Its customer base comprises more than 400 active global corporations across some 28 countries, and includes large and specialist consultancies and governments. In terms of size, Orbus reports that over 70% of customers acquired in the last year have annual revenues exceeding \$10bn.

Orbus Software services a rapidly growing customer base (25% per annum) through three fully operational offices in Sydney, London, and New York, with each location providing sales, marketing, support, and consultancy. The company has adopted a new business acquisition model that acquired over 80 new customers in 2015. Global retention of customers is currently sitting at 92% annually, evidencing Orbus Software's ability to execute on sales, support, and ongoing consultancy across its global client base of "maintenance paying" customers.

Analysis of data from the company's CRM system highlights that Orbus Software is able to compete with and win against other well-established enterprise architecture management solution vendors on a regular basis, and has done so for a number of years. Furthermore, Orbus enters 2016 as a recognized global leader in the enterprise architecture management suites market. Common reasons

why Orbus has been successful against these vendors include its modeling capabilities, ease of use (from both a Microsoft software usage and meta model flexibility perspective), and comprehensive range of out-of-the-box, extensive customizable support for frameworks and standards.

In 2016, Orbus Software will be further expanding its Global Partner Alliance to service its target markets. This alliance comprises more than 70 active IT consultancies, including large global service providers and system integrators as well as niche, local domain specialists. The expansion of the Partner Alliance with the large consultancies will be driven through a comprehensive set of 42 e-learning modules. This enables Alliance Partners to provide self-paced online learning to partner employees, covering product functionality, the domains (with certifications online), and the demonstration/support of the product. This learning package utilizes a learning management system called the Academy.

Appendix

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