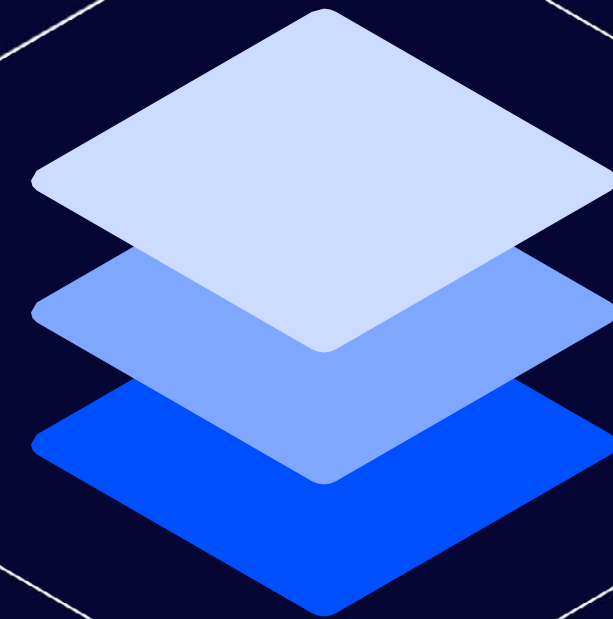




GARTNER SYMPOSIUM 2024

# An EA Co-Pilot for developing an Intelligent Business Operating Model

**Dr Terry Roach**  
Founder - Capsifi









# The role of Business Architecture is to establish the Operating Model as a core strategic asset

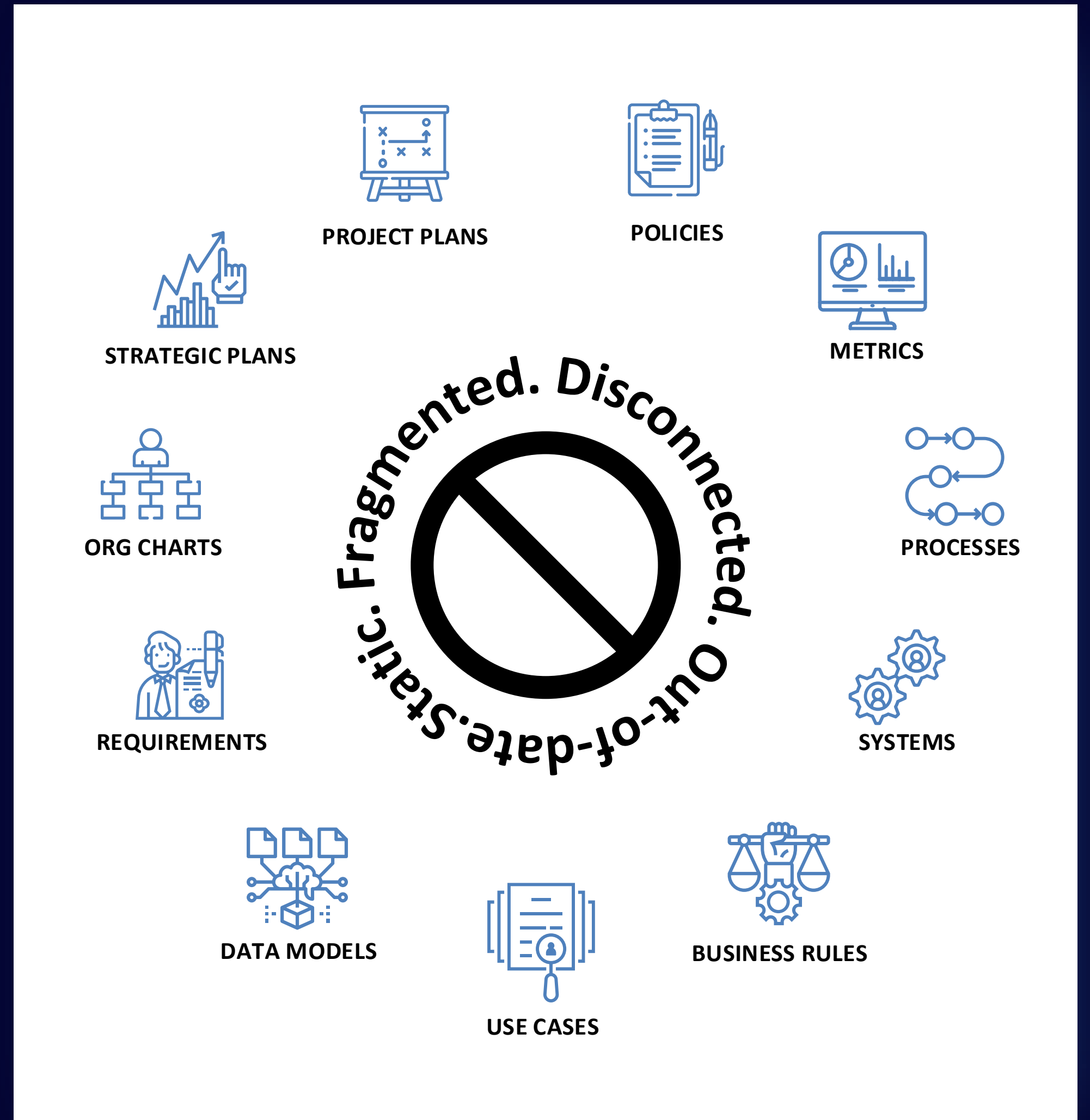
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► Most operating model knowledge is fragmented, disconnected and only has a **lifespan of a current project**

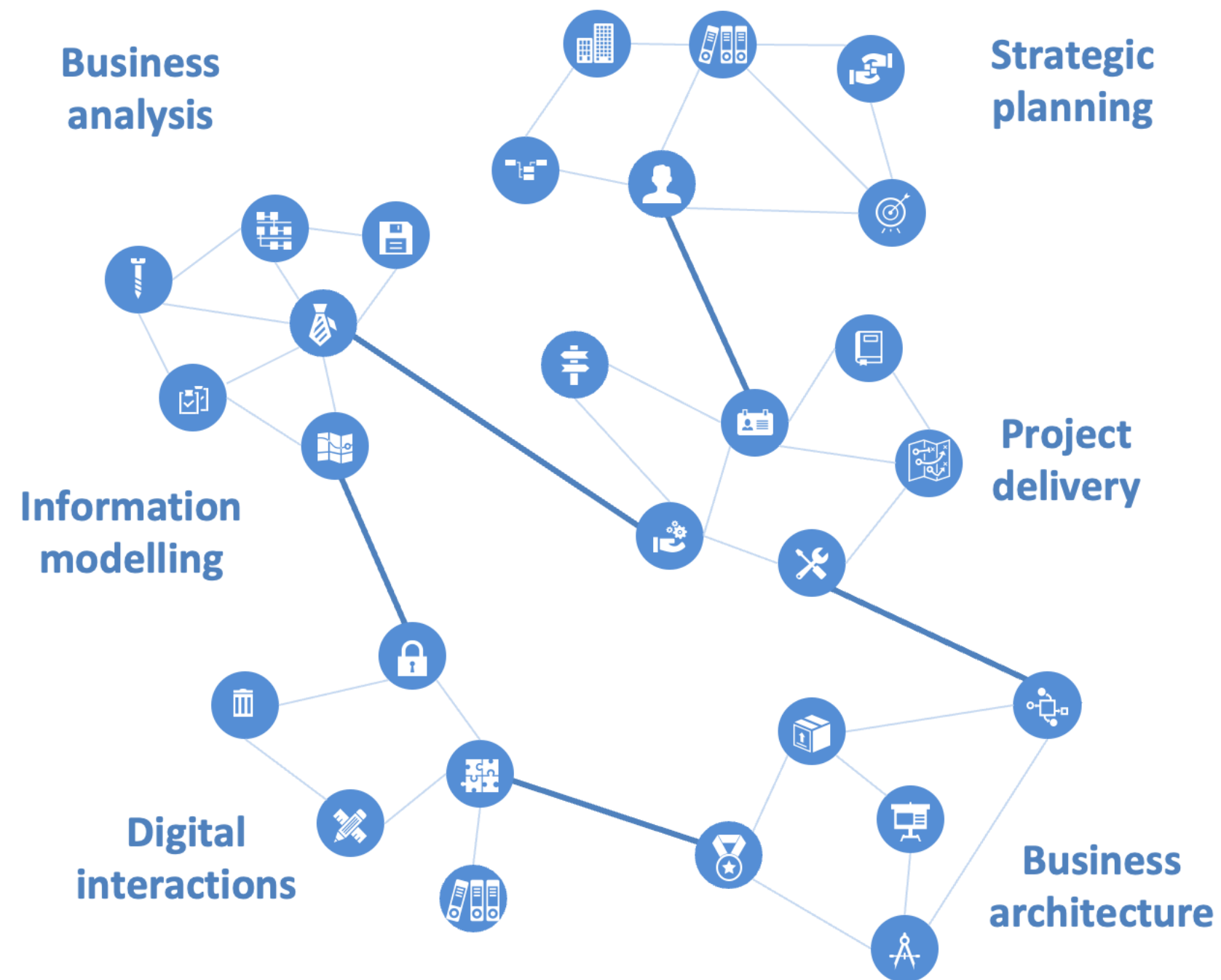
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► Every new initiative requires a comprehensive exercise in... **'Business Archeology'**

---



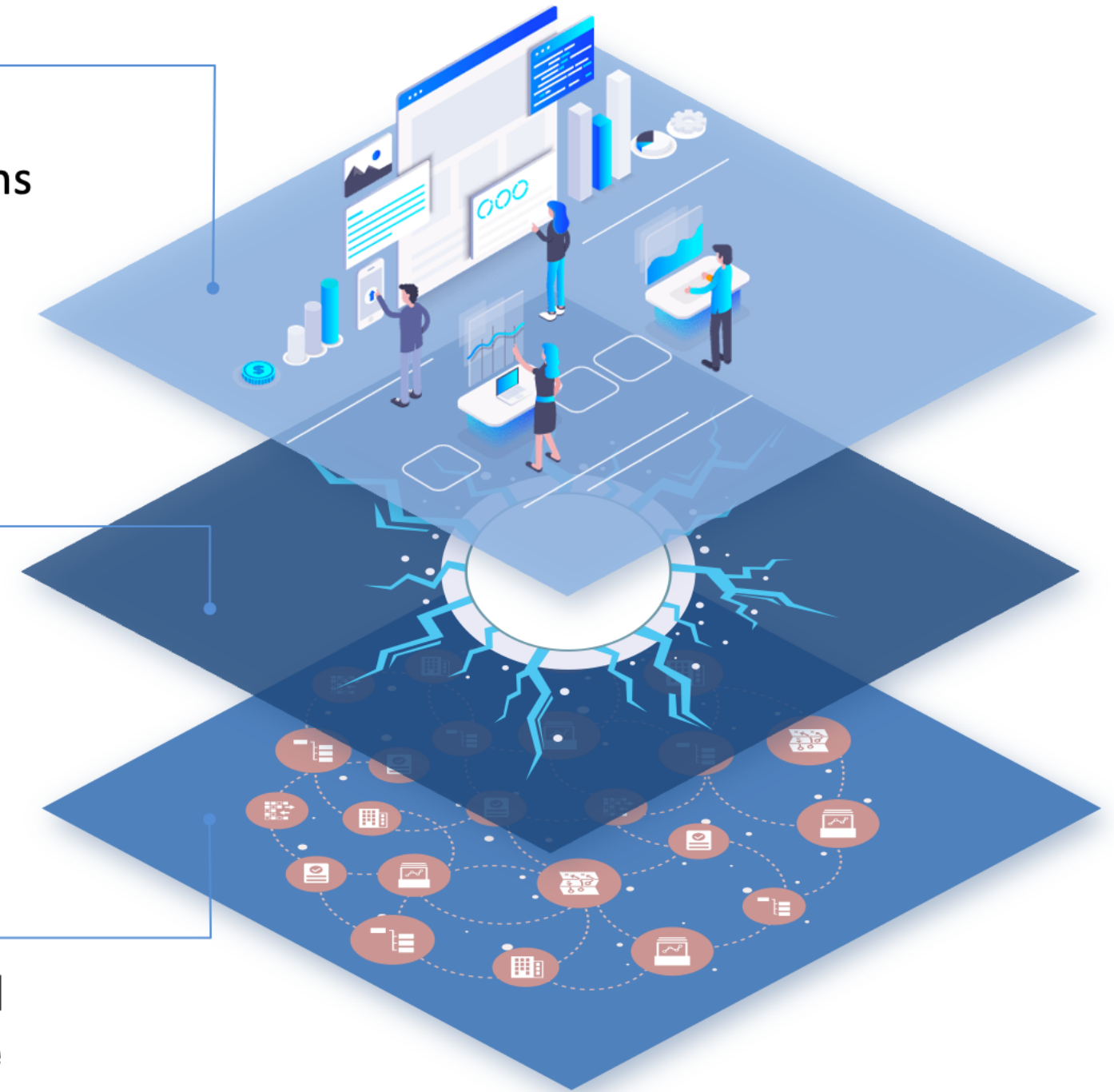
# An Enterprise Ontology is a semantic Knowledge Graph that consolidates and explains Operating Model knowledge



**View**  
Intuitive  
visualisations

**Control**  
Intelligent  
queries

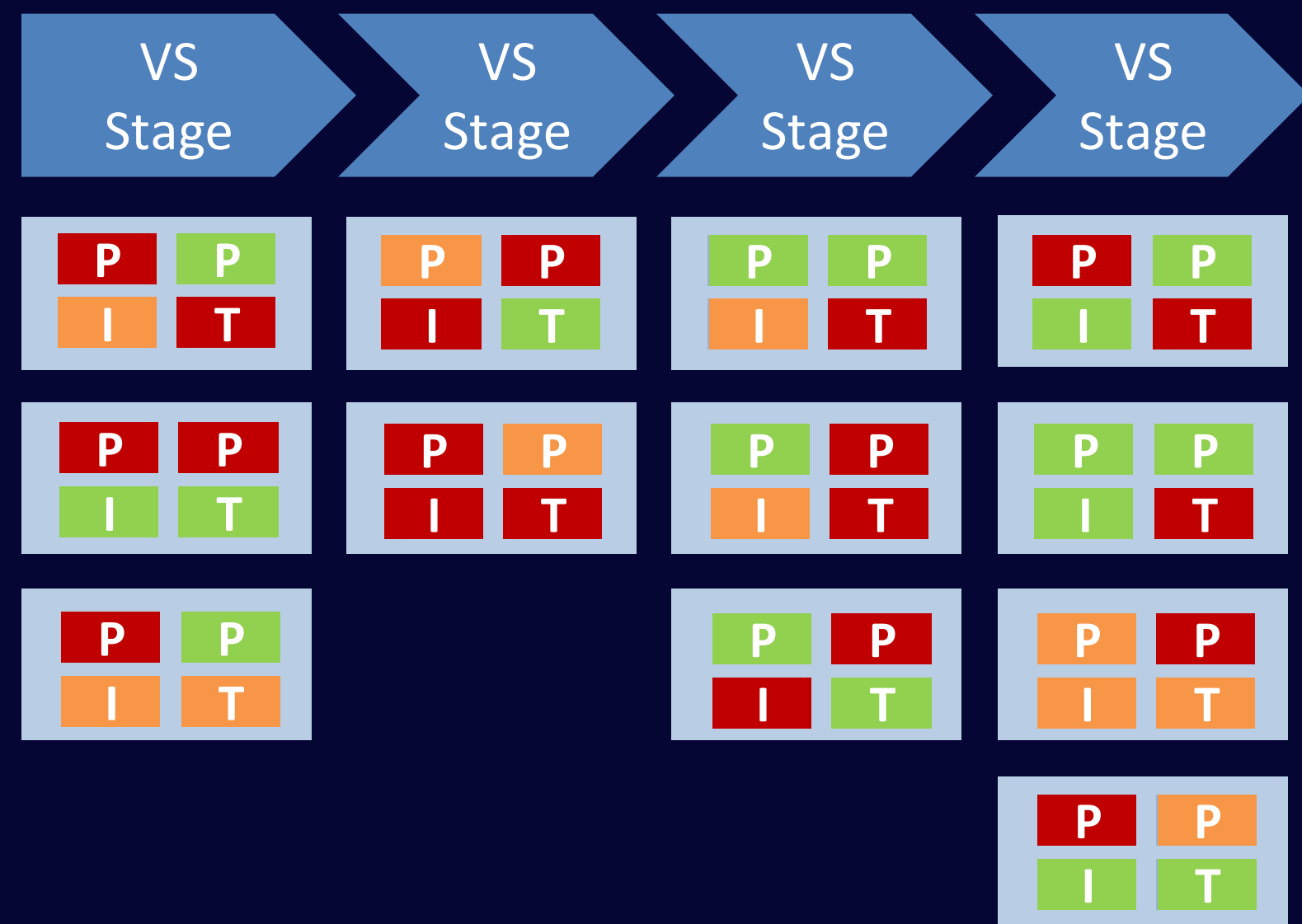
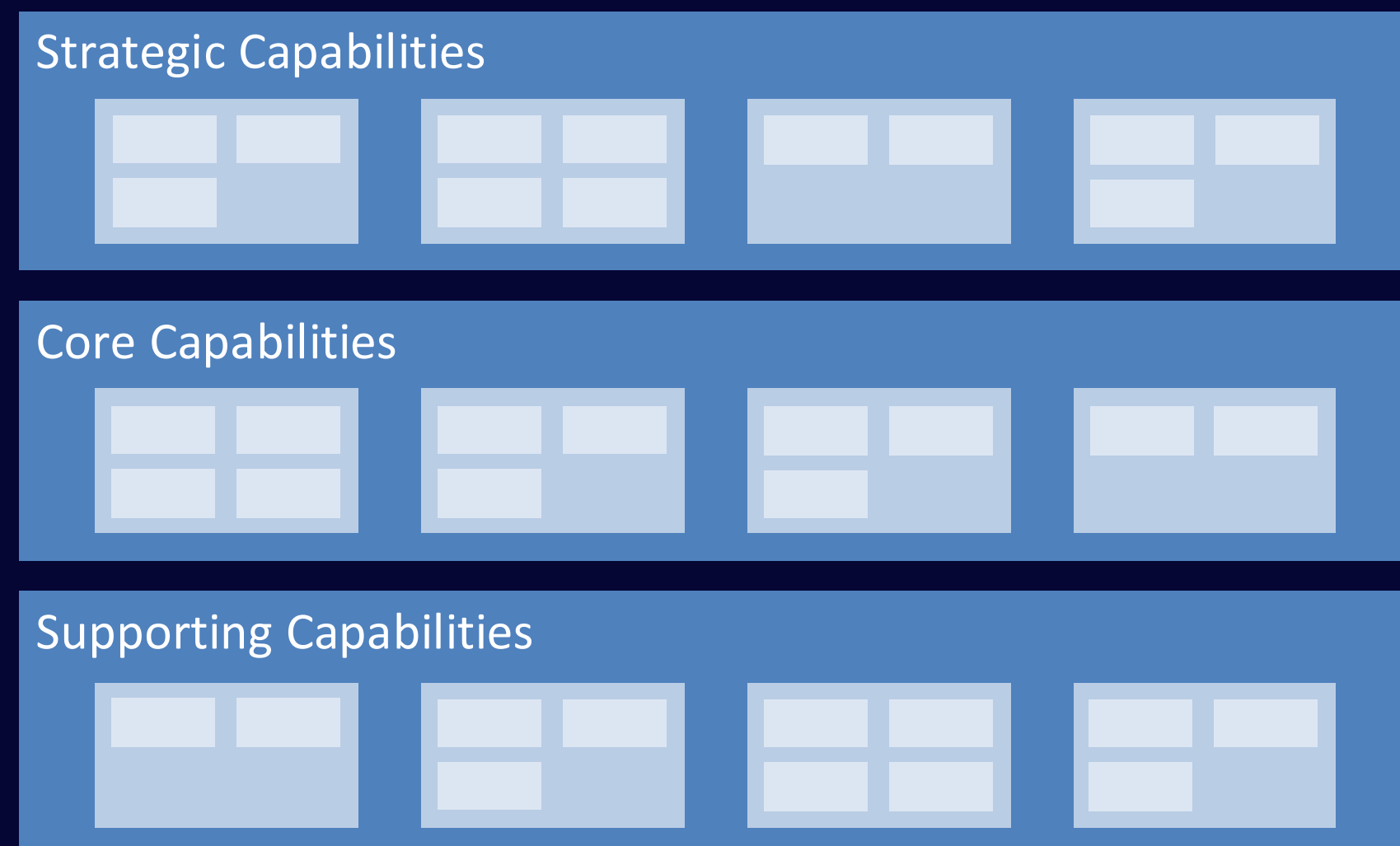
**Model**  
Connected  
knowledge



# The Anatomy of a Business Operating Model

Business Capabilities are the **building blocks** for the business operating model

Value Streams are **scaffolds** for aligning capabilities to stakeholder interactions



The Operating Model **dimensions** are:  
People, Process, Information & Technology

**Mature**  
**Immature**  
**Undeveloped**



# The Anatomy of Operating Model Transformation

## STRATEGY

Strategic Business Plan

Goals

Objectives

Strategies

Tactics

Policies

Controls

## OPERATION

ValueStream

Capabilities

People

- Roles
- Skills
- Teams

Process

- Tasks
- Flows
- Use Cases

Information

- Objects
- Attributes
- Glossary

Technology

- Applications
- Systems
- Interfaces

## DELIVERY

Program

Project

Sprint

Feature Backlog

## TRANSFORMATION

### PLAN THE CHANGE

Plan

Roadmap

Budget

Outcomes

### DESIGN THE CHANGE

Assessments

Ideas

Painpoints

Features

### IMPLEMENT THE CHANGE

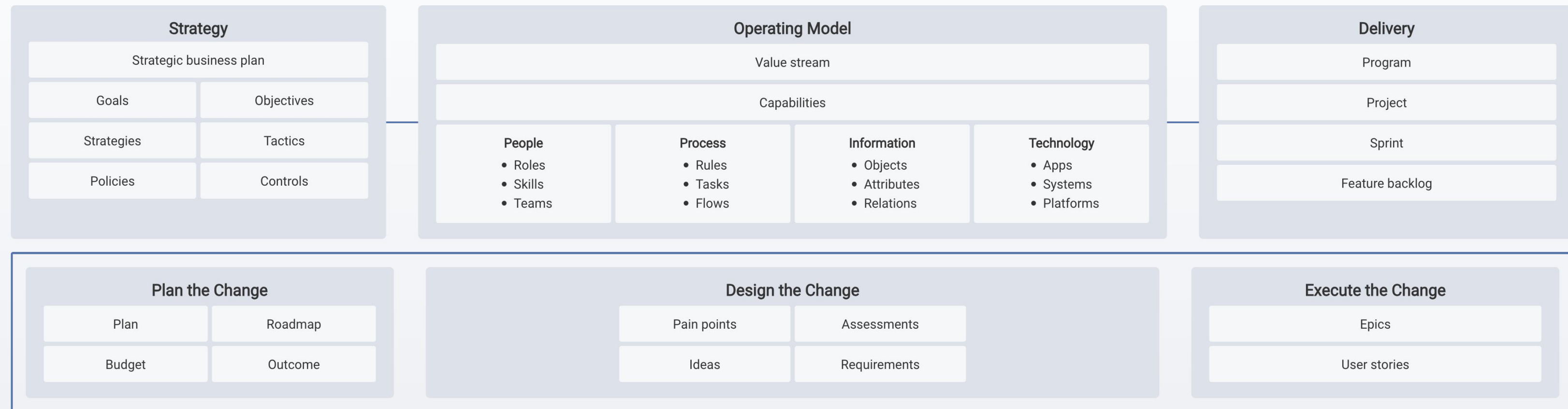
Epics

User Stories



# Capability-Based Planning

Enterprise Architecture practitioners must be able to produce and manage models that can help the enterprise understand how it needs to transform to changing strategy, objectives, and outcomes in the most optimal and resilient way.



## Set Strategy

- Set the business strategy, establish business objectives and define key metrics
- Align desired results with proposed courses of action

## Plan Initiative

- Create transformation initiative, establish timeline and budget
- Define business outcomes & develop the business case

## Optimize the Value Stream

- Align initiative to value stream
- Identify opportunities for optimization across operating model elements

## Assess the Gaps

- Design solution, model use cases, define requirements and acceptance criteria
- Run innovation workshops to identify painpoints, solicit ideas and prioritise transformation scope

## Align Scope

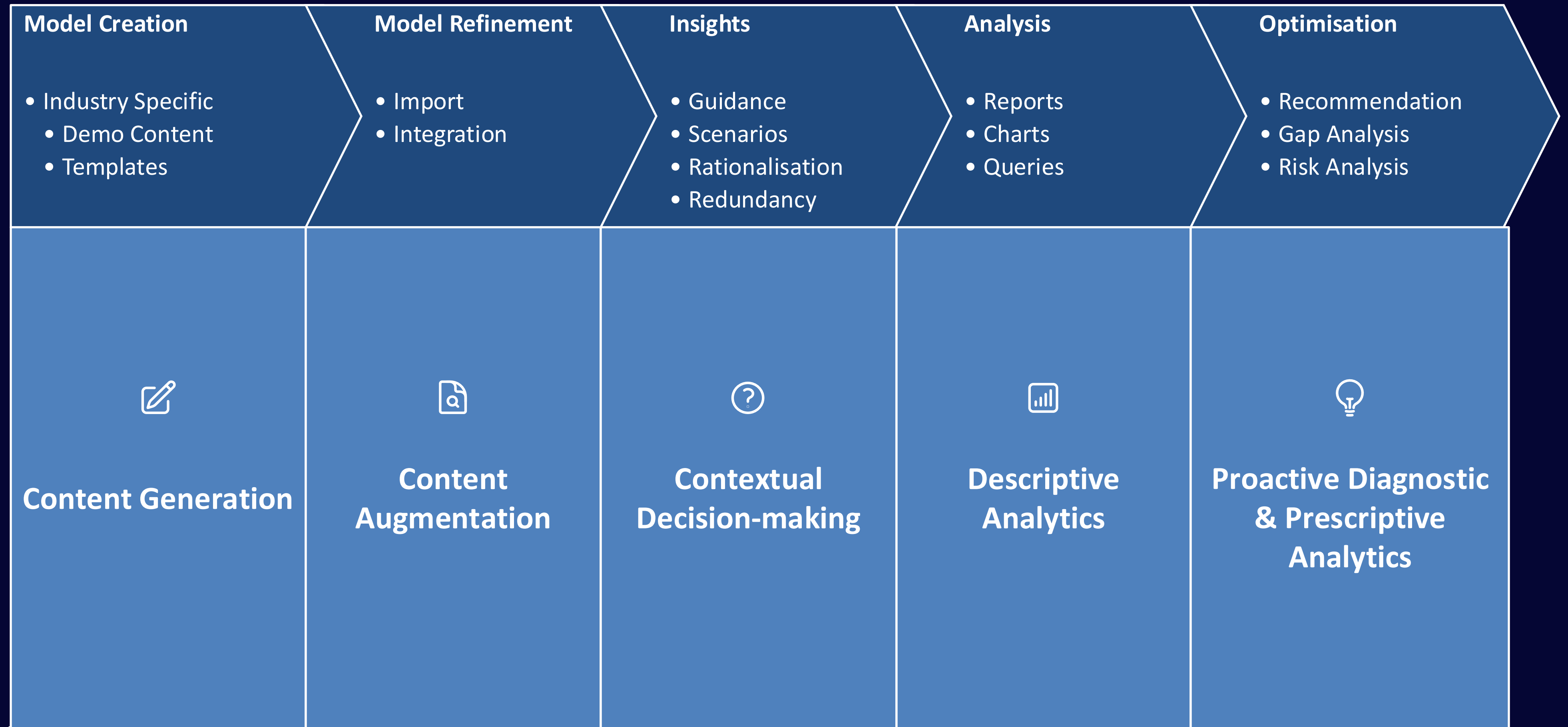
- Allocate and schedule work items into epics of user stories and assign to delivery teams

## Monitor Delivery

- Track and monitor delivery roadmaps across the transformation portfolio



# Capsifi Copilot – Intelligent Operating Model Spectrum





# Example AI Generated Content:

## Media Industry - ValueStreams

### 1. Content Creation

This value stream involves the creation of various forms of content, including writing, filming, editing, design, and production.

### 2. Content Distribution and Delivery

Once the content is created, the distribution and delivery value stream involves publishing on websites, broadcasting on television or radio, and other channels.

### 3. Advertising and Monetization

Media companies often generate revenue through advertising partnerships with advertisers, managing ad campaigns, and other monetization strategies.

### 4. Audience Engagement and Community Building

Media companies aim to build and engage a loyal audience through social media, events, and initiatives to foster engagement, loyalty, and user-generated content.

### 5. Data Analytics and Insights

Media companies rely on data to understand audience behavior, optimize content, and target advertising. This value stream involves data collection, analysis, and reporting.

### 6. Licensing and Intellectual Property Management

Media companies often hold valuable intellectual property rights, such as copyrights and trademarks. This value stream involves managing these assets, negotiating licensing deals, and protecting intellectual property.

### 7. Partnerships and Collaborations

Media companies frequently collaborate with external entities, such as content creators, influencers, platforms, and distributors, to expand their reach and create new content.

### 8. Technology Infrastructure and Operations

Media companies heavily rely on technology infrastructure, including content management systems, streaming platforms, and digital marketing tools. This value stream involves maintaining and optimizing these systems.

### 9. Regulatory Compliance and Ethics

Media companies must comply with various regulations and ethical standards, such as copyright law, advertising regulations, and data protection. This value stream focuses on ensuring compliance and ethical practices.

## 1. Content Creation - ValueStream Stages

### • Research and Ideation

Gathering information, conducting market research, and generating creative ideas for content.

**Capabilities: Market Research, Trend Analysis, and Idea Generation.**

### • Production Planning

Developing content plans, creating outlines or storyboards, and assigning tasks.

**Capabilities: Content Planning, Resource Allocation, and Scheduling.**

### • Content Creation

Writing articles, filming videos, recording audio, designing graphics, and creating interactive content.

**Capabilities: Writing, Filming, Designing, or Recording Content.**

### • Editing and Quality Assurance

Reviewing and refining content for accuracy, clarity, grammar, style, and adherence to brand guidelines.

**Capabilities: Editing, Proofreading, and Quality Control.**

### • Content Approval

Seeking internal or client approval for the final content before distribution.

**Capabilities: Workflow Management, Collaboration, and Approval Processes.**



# Example AI Generated Content:

	A	B	C	D	E	F	G
1	Capability Label	Capability Description	Capability ID	Capability Parent	Capability Level		
2	0 Media Capabilities	A comprehensive Business Capability Map for the Media Industry	0		Level 0		
3	1 Content Lifecycle Management	Manages the end-to-end content lifecycle.	1	0 Media Capabilities	Level 1		
4	1.1 Content Creation	Involves generating creative content.	1.1	1 Content Lifecycle Management	Level 2		
5	1.1.1 Ideation and Research	Conducts market research and generates ideas.	1.1.1	1.1 Content Creation	Level 3		
6	1.1.1.1 Market Research and Trend Analysis	Conducts in-depth market research to identify trends and insights	1.1.1.1	1.1.1 Ideation and Research	Level 4		
7	1.1.1.2 Content Ideas Generation	Generates innovative and engaging content ideas tailored to the ta	1.1.1.2	1.1.1 Ideation and Research	Level 4		
8	1.1.1.3 Research Planning and Execution	Plans and executes research projects with precision. This includes	1.1.1.3	1.1.1 Ideation and Research	Level 4		
9	1.1.2 Writing and Copy Editing	Involves writing, editing, and maintaining style guides.	1.1.2	1.1 Content Creation	Level 3		
10	1.1.2.1 Writing and Editing	Demonstrates exceptional writing skills and expertise in content cr	1.1.2.1	1.1.2 Writing and Copy Editing	Level 4		
11	1.1.2.2 Proofreading and Copy Editing	Focuses on meticulous proofreading and copy editing to ensure co	1.1.2.2	1.1.2 Writing and Copy Editing	Level 4		
12	1.1.2.3 Style Guide Development and Maintenance	Develops comprehensive style guides that define writing and bran	1.1.2.3	1.1.2 Writing and Copy Editing	Level 4		
13	1.1.3 Graphic Design and Illustration	Creates graphics, illustrations, and visual identities.	1.1.3	1.1 Content Creation	Level 3		
14	1.1.3.1 Graphic Design Creation	Creates visually appealing graphics that enhance the presentation	1.1.3.1	1.1.3 Graphic Design and Illustration	Level 4		
15	1.1.3.2 Illustration and Visual Asset Creation	Specializes in creating illustrations and visual assets that enrich m	1.1.3.2	1.1.3 Graphic Design and Illustration	Level 4		
16	1.1.3.3 Branding and Visual Identity Design	Shapes and maintains the visual identity of a media brand. This inc	1.1.3.3	1.1.3 Graphic Design and Illustration	Level 4		
17	1.1.4 Video Production and Editing	Plans, films, and edits videos.	1.1.4	1.1 Content Creation	Level 3		
18	1.1.4.1 Video Production Planning	Plans video production projects, outlining key aspects such as cor	1.1.4.1	1.1.4 Video Production and Editing	Level 4		
19	1.1.4.2 Filming and Videography	Operates cameras and other filming equipment to capture high-qua	1.1.4.2	1.1.4 Video Production and Editing	Level 4		
20	1.1.4.3 Video Editing and Post-production	Manages the post-production phase of video projects, including ed	1.1.4.3	1.1.4 Video Production and Editing	Level 4		
21	1.1.5 Audio Recording and Editing	Plans, records, and edits audio.	1.1.5	1.1 Content Creation	Level 3		
22	1.1.5.1 Audio Recording Planning	Plans audio recording sessions, including selecting recording enviro	1.1.5.1	1.1.5 Audio Recording and Editing	Level 4		
23	1.1.5.2 Voiceover and Sound Recording	Performs voiceover work and sound recording, including narratio	1.1.5.2	1.1.5 Audio Recording and Editing	Level 4		
24	1.1.5.3 Audio Editing and Mixing	Edits and mixes audio tracks to achieve optimal sound quality and	1.1.5.3	1.1.5 Audio Recording and Editing	Level 4		
25	1.2 Content Production Planning	Plans and manages content production.	1.2	1 Content Lifecycle Management	Level 2		
26	1.2.1 Content Planning and Strategy	Develops content plans and strategies.	1.2.1	1.2 Content Production Planning	Level 3		
27	1.2.1.1 Content Roadmapping and Planning	Strategically maps out the long-term content direction of a media o	1.2.1.1	1.2.1 Content Planning and Strategy	Level 4		
28	1.2.1.2 Editorial Calendar Management	Manages and maintains an editorial calendar that schedules conte	1.2.1.2	1.2.1 Content Planning and Strategy	Level 4		
29	1.2.1.3 Content Strategy Development	Develops comprehensive content strategies that outline the overar	1.2.1.3	1.2.1 Content Planning and Strategy	Level 4		
30	1.2.2 Resource Allocation and Scheduling	Allocates resources and schedules tasks.	1.2.2	1.2 Content Production Planning	Level 3		
31	1.2.2.1 Resource Identification and Allocation	Identifies the necessary resources, including personnel, tools, and	1.2.2.1	1.2.2 Resource Allocation and Scheduling	Level 4		
32	1.2.2.2 Task and Workflow Management	Manages content production workflows and task assignments. Thi	1.2.2.2	1.2.2 Resource Allocation and Scheduling	Level 4		
33	1.2.2.3 Production Schedule Development	Develops production schedules that outline the timelines and miles	1.2.2.3	1.2.2 Resource Allocation and Scheduling	Level 4		
34	1.2.3 Production Budgeting and Forecasting	Manages budgets and forecasts costs.	1.2.3	1.2 Content Production Planning	Level 3		
35	1.2.3.1 Budget Planning and Estimation	Develops budgets for content-related activities, including productio	1.2.3.1	1.2.3 Production Budgeting and Forecasting	Level 4		



Media Capabilities

Media App Portfolio

Media Org Units

Media Roles & Skills

Media ValueStreams

Media Process Catalog

Media Concept Model



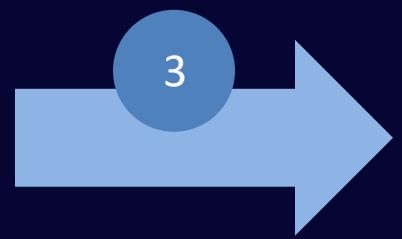
# Capsifi AI Copilot

## Model Generation

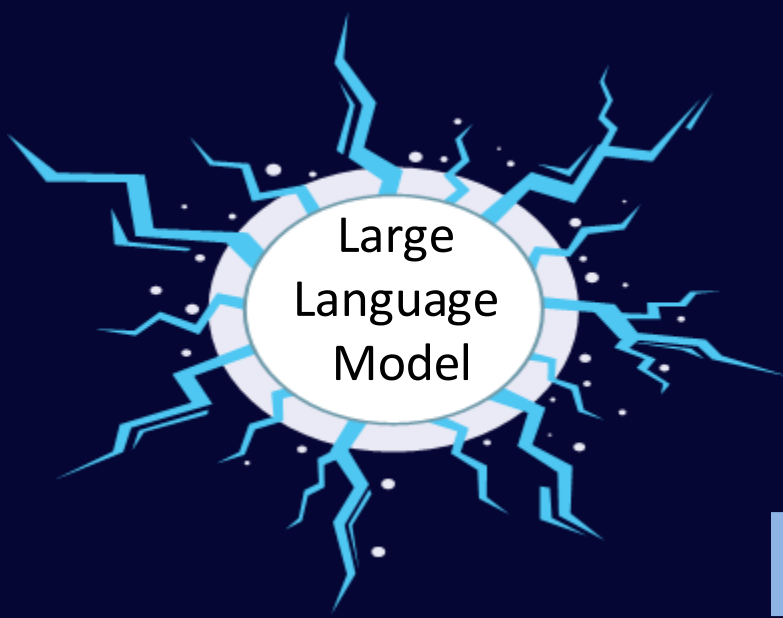
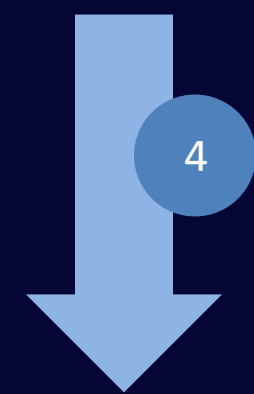
**1** New  
Need assistance in decision-making?  
Utilize our AI Generate feature for recommendations.  
Generate Capabilities

**2** Catalogue Management  
Capsifi Library  
Upload

**Capability Model Generator**  
Provide details about your organisation for a more specific model.  
Industry: Add industry 0/50  
Region: Add region 0/50  
Clicking continue will request an AI-generated Capability Model and commence the Load Catalogue wizard. You will be able to review the model before proceeding.  
Cancel Continue

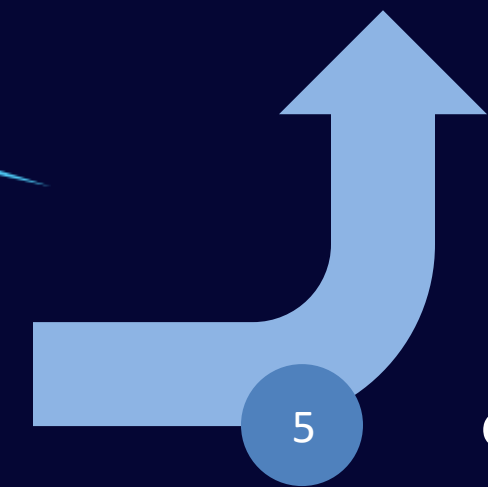


Parametric Prompt Engineering



Capsifi Operating Model-as-an Asset

Capsifi Connected Knowledge Graph



Bespoke Model Generation

**3** Load catalogue items

Source Headers	Logical Level	Label	Parent	Description
	1	1. Claims Management	1. Claims Management	Ability to identify, track, and respond to a demand or request L...
	2	1.1. Claims Settlement	1. Claims Management	Process of resolving claims by determining the amount to be p...
	2	1.2. Dispute Resolution	1. Claims Management	Process of resolving disagreements between the insurer and th...
	3	1.1.1. Claims Handling	1.1. Claims Settlement	Managing the administrative and procedural aspects of claim...
	3	1.1.2. Claims Recovery	1.1. Claims Settlement	Efforts to recover funds from third parties responsible for...

**5** Value Stream: Settle Claim  
The method by which a claim settlement is determined to compensate or restore an asset for a loss.

Value Proposition: Empty Nesters - Insurance Claim | Stakeholder: Empty Nesters | Offering: Claim Settlement - Empty Nesters

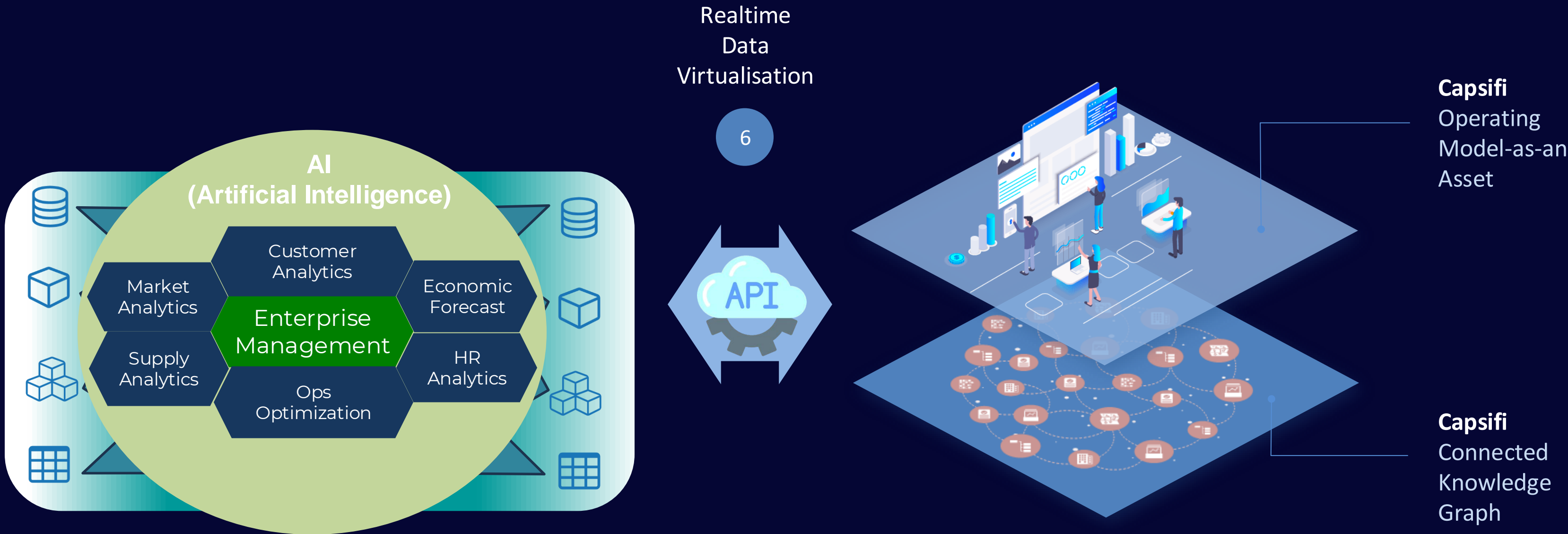
Value Stream	Receive Claim	Validate Claim	Adjudicate Claim	Claim Determination	Gather further Information	Finalise Claim
Settle Claim	<ul style="list-style-type: none"> <li>Incident Occurred</li> <li>Claim established</li> <li>Claim number issued</li> <li>Incident Checked</li> <li>Claims Representative</li> <li>Record of incident established</li> </ul>	<ul style="list-style-type: none"> <li>Claim number issued</li> <li>Claim validated and allocated</li> <li>Claims Representative</li> <li>Eligible claim</li> </ul>	<ul style="list-style-type: none"> <li>Eligible claim</li> <li>Method of resolution determined</li> <li>Claims Representative</li> <li>Method of resolution known</li> </ul>	<ul style="list-style-type: none"> <li>Estimated loss, method of resolution determined</li> <li>Terms of the policy have been met</li> <li>Claims Representative</li> <li>Indemnification has occurred</li> </ul>	<ul style="list-style-type: none"> <li>Claim outcome has been determined</li> <li>Decision made</li> </ul>	<ul style="list-style-type: none"> <li>Terms of the policy have been met</li> <li>Final cost of claim known</li> <li>Records updated</li> <li>Claims Representative</li> <li>Customer claims history known</li> </ul>

Metrics: 122% (Actual 9.80 Target 8), 100% (Actual 1.50 Target 1.50), 80% (Actual 2 Target 2.50), 175% (Actual 3.50 Target 2), 100% (Actual 1.50 Target 1), 50% (Actual 0.25 Target 0.50), 200% (Actual 1 Target 0.50)

Capabilities: 2.5.2 Claim Lifecycle Management, 2.5.1 Claim Information Management, 2.5.2 Claim Lifecycle Management, 2.5.3 Claims Recovery, 2.5.1 Claim Information Management, 2.5.4 Claims Inquiry, 2.5.2 Claim Lifecycle Management, 2.5.3 Claims Handling, 2.5.6 Dispute Resolution, 2.5.2 Claim Lifecycle Management, 2.5.7 Fraud Management, 2.5.7 Fraud Management, 2.5.7 Fraud Management, 2.5.7 Fraud Management, 2.5.3 Claims Handling, 2.5.2 Claim Lifecycle Management

# Capsifi AI Copilot

## Content Augmentation





# Capsifi AI Copilot

## Proactive Recommendations



Intelligent Insights

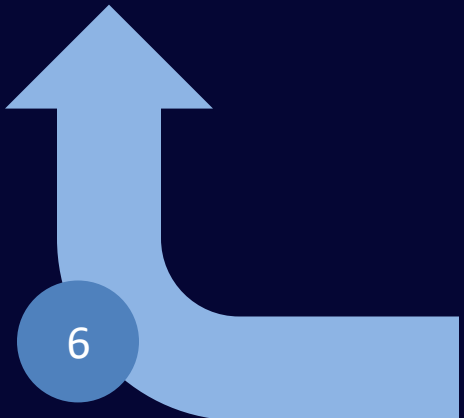
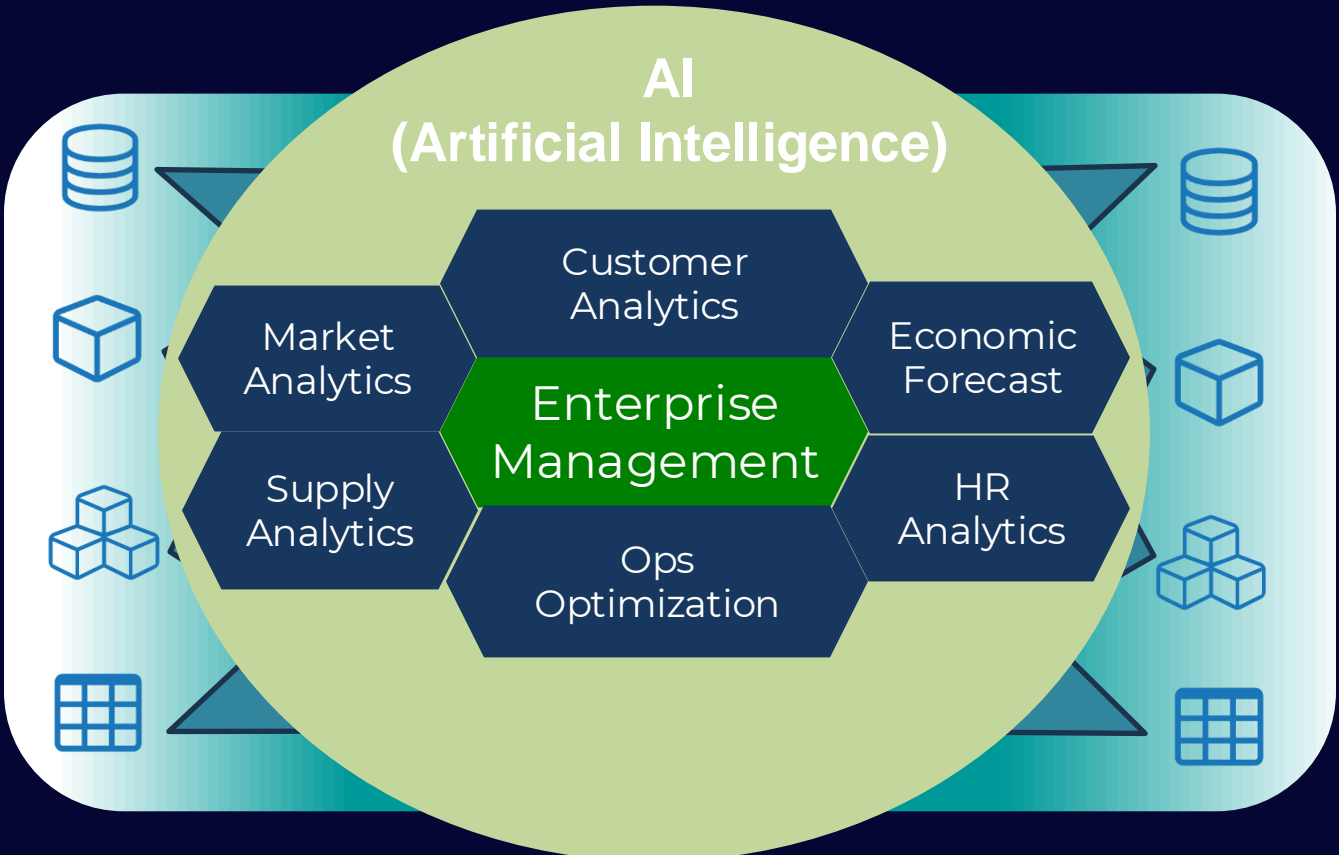
Realtime Data Virtualisation

5

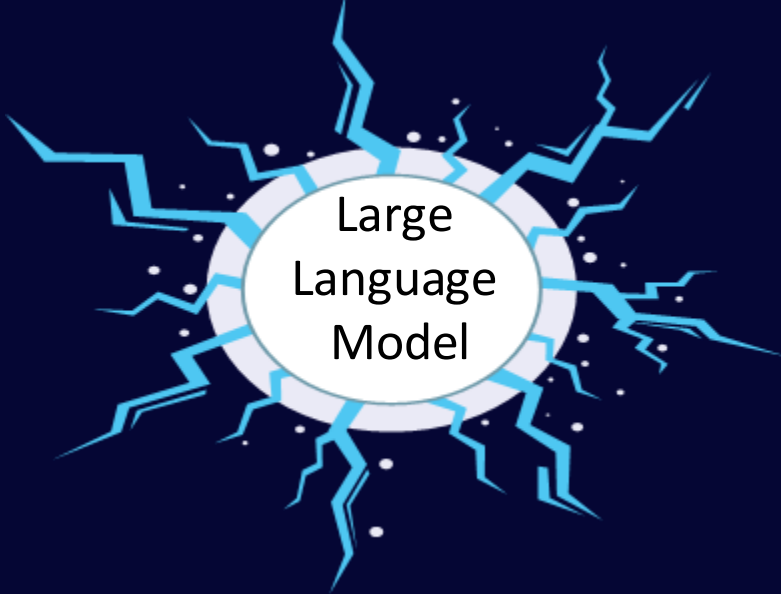


Capsifi Operating Model-as-an Asset

Capsifi Connected Knowledge Graph



6



Large Language Model



Capsifi Intelligent Agents  
*(Proprietary Prompt Engineering)*





# Thank You for Attending!

Check Out [Capsifi at Booth #223](#)

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