



# BUSINESS ANALYSIS CONFERENCE EUROPE

16 - 18 September 2024 • London, UK

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the event mobile app\***

# Closing the 3 gaps – Business architecture in action

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# We're Phoenix Group

**The UK's largest long-term savings and retirement business.**

We look after the pensions, savings and investments of around 12 million customers across the UK and Europe

Our purpose is to help people secure a life of possibilities; from our customers, colleagues and investors, to wider society.

**Our vision is to be the UK's leading retirement savings and income business**



# Session Objectives

1

Introduce 'The Art of Action'

2

Insights into Business architecture at Phoenix Group

3

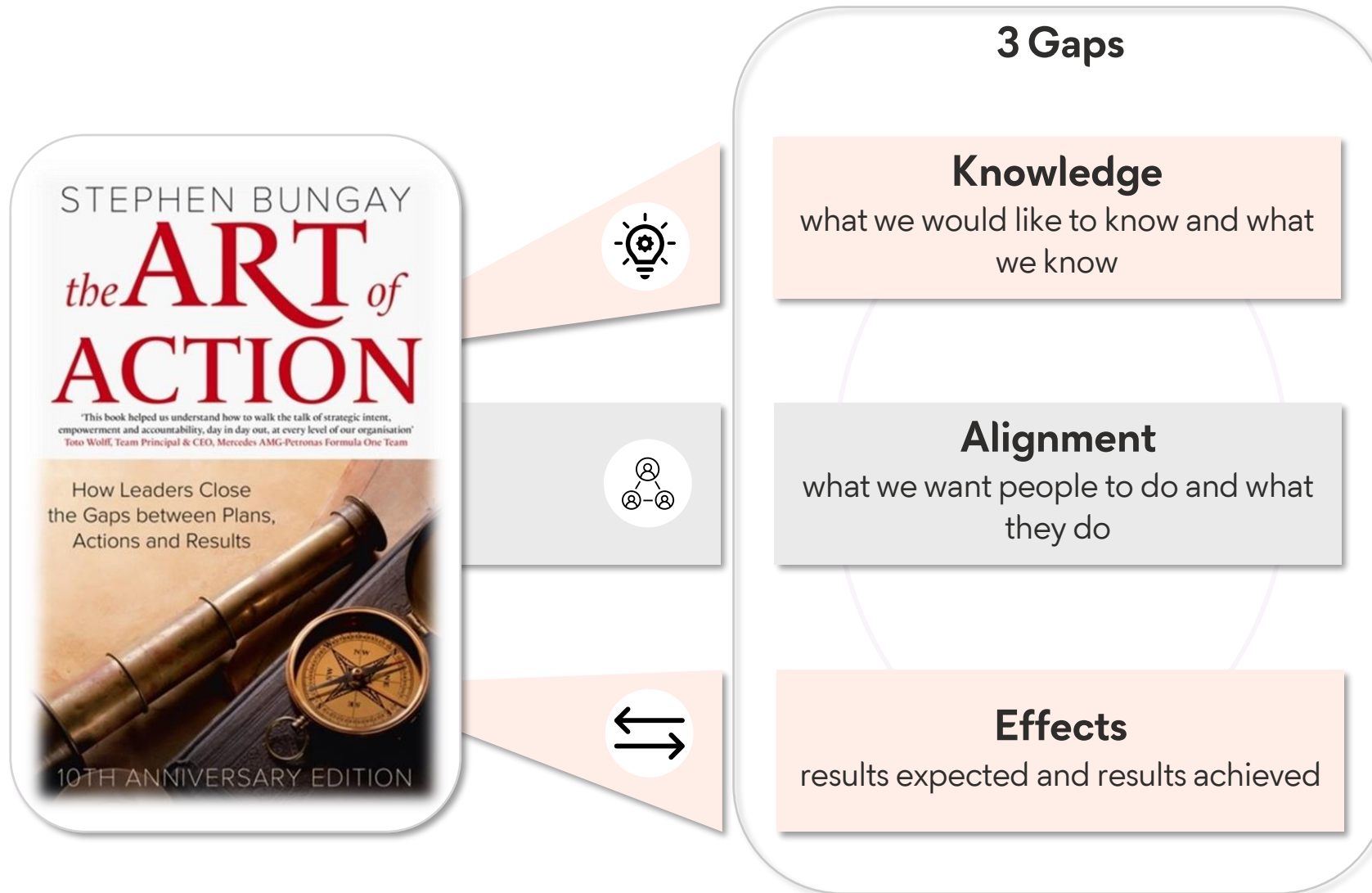
Business architecture linkage into business analysts



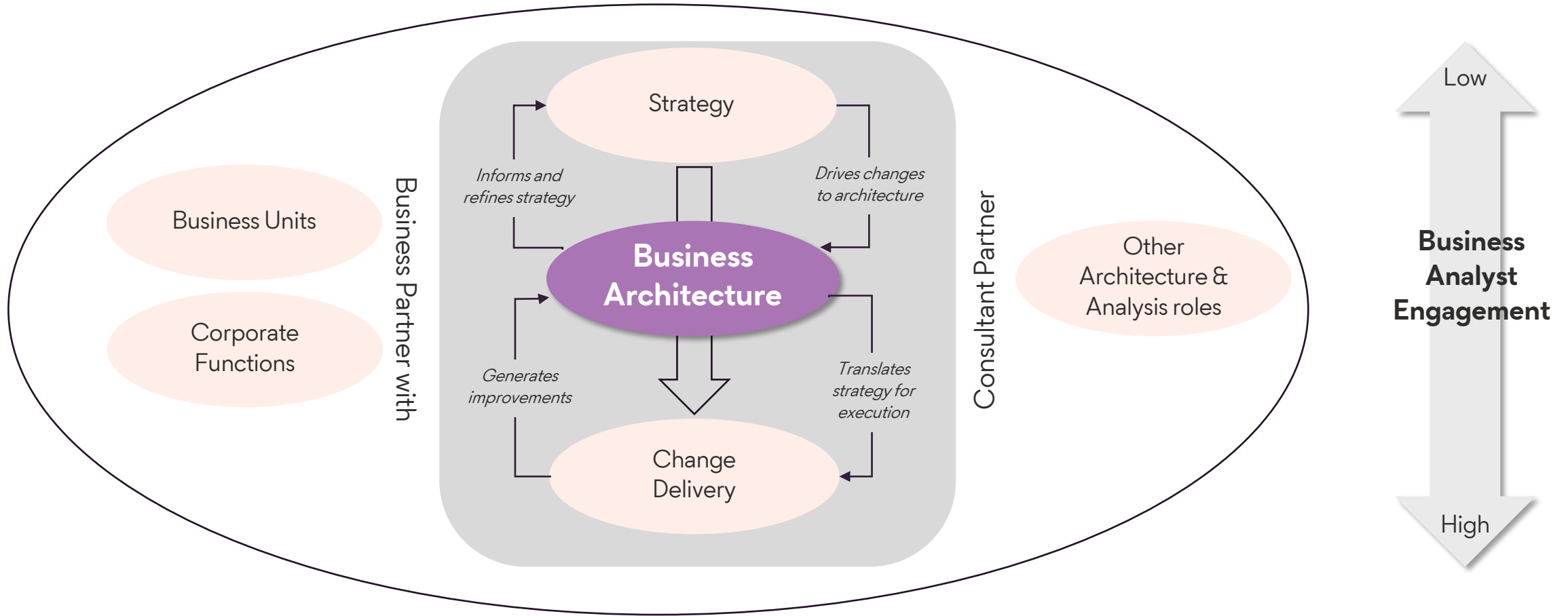
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Q&A

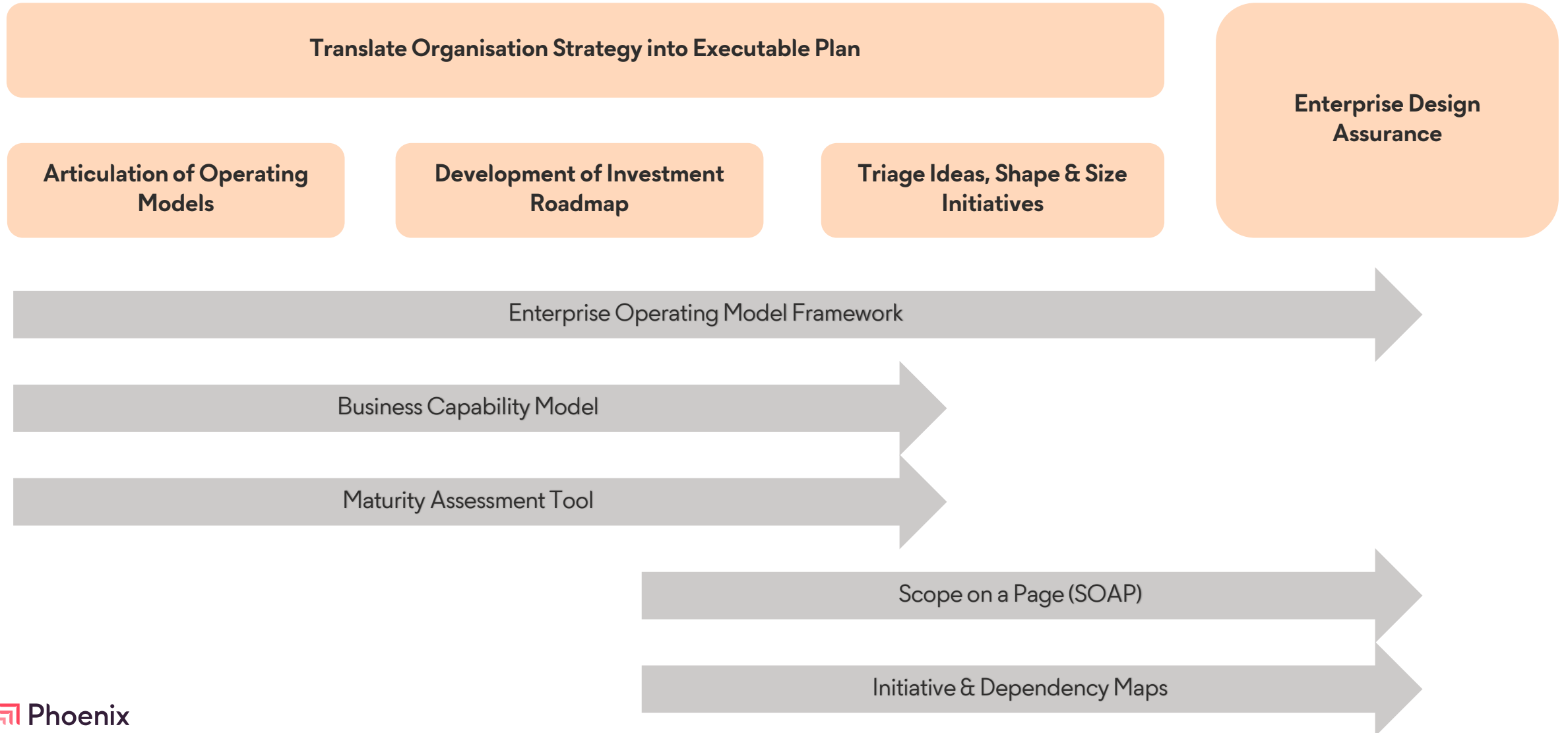
# Friction makes doing simple things difficult and difficult things impossible



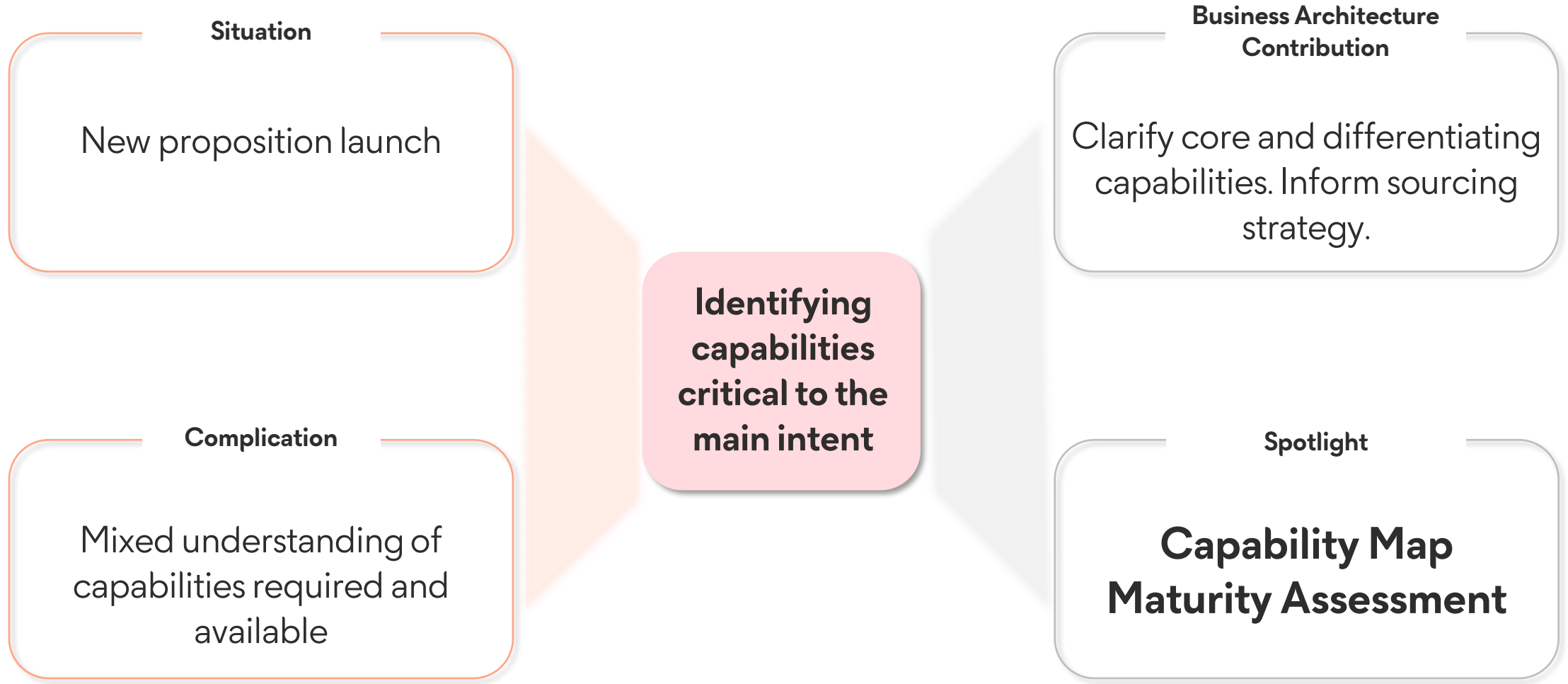
# Business architecture within Phoenix & Business Analysis linkage



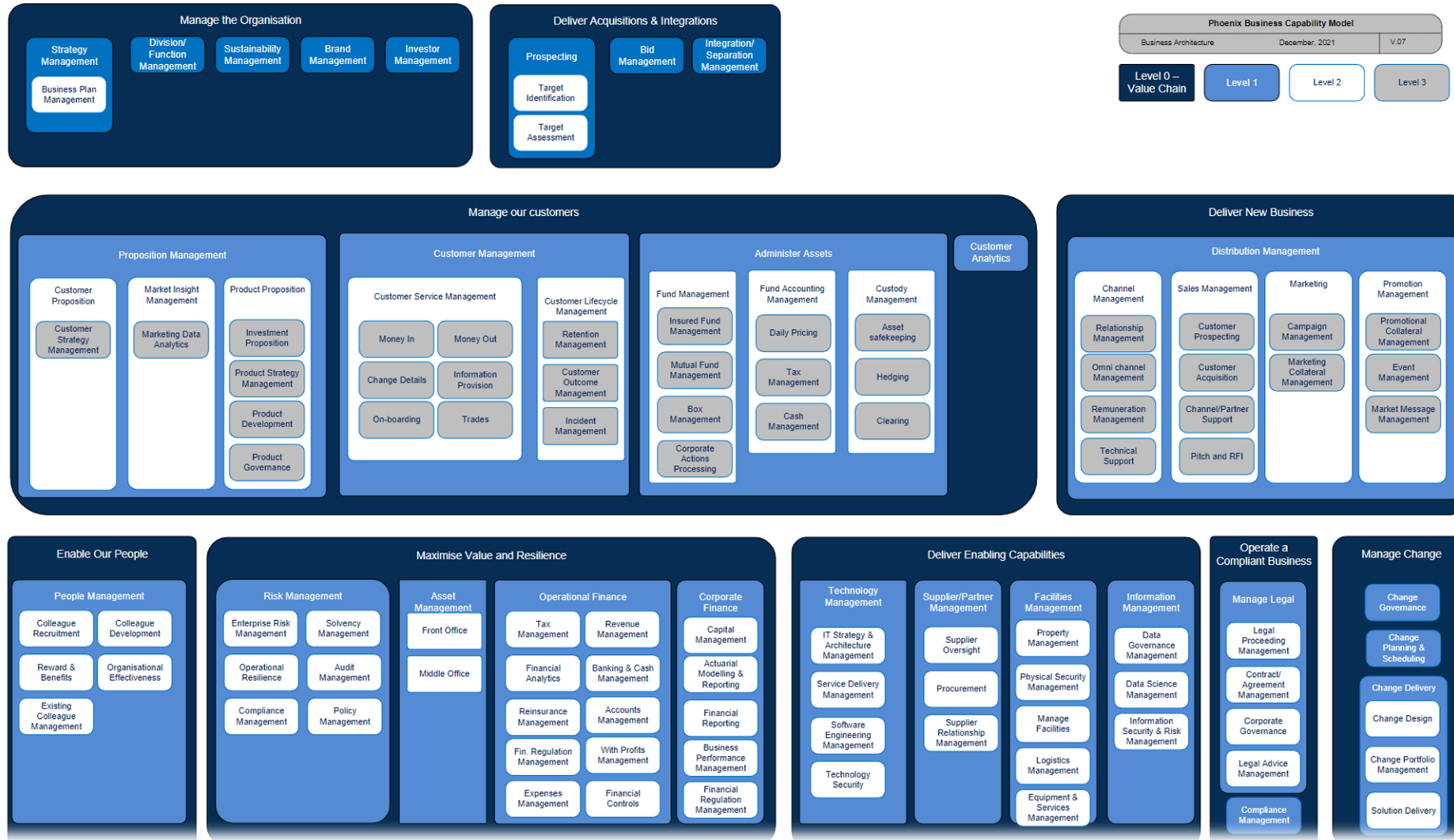
# Key activities and supporting tools



# Case Study 1 : Knowledge Gap



# Business capability model

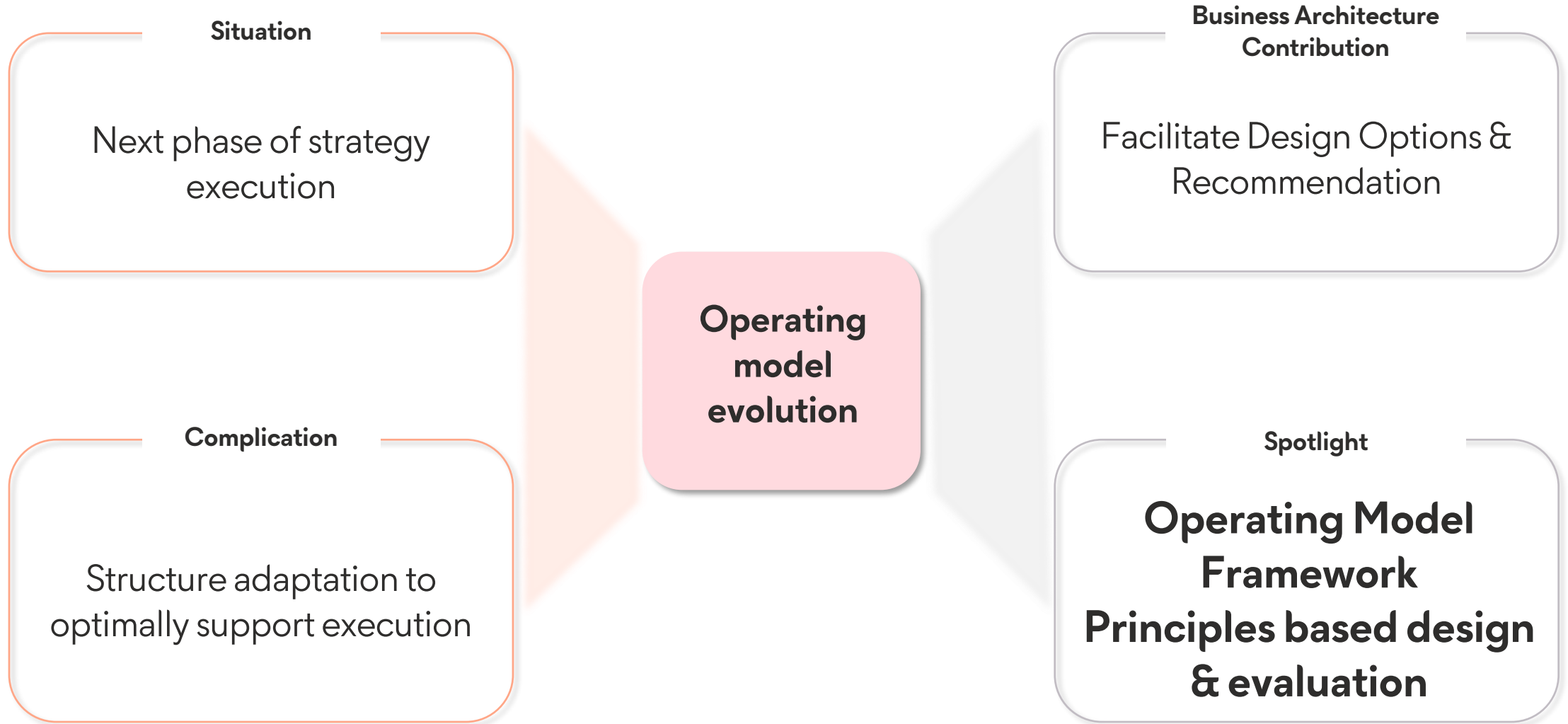


# Capability maturity assessment

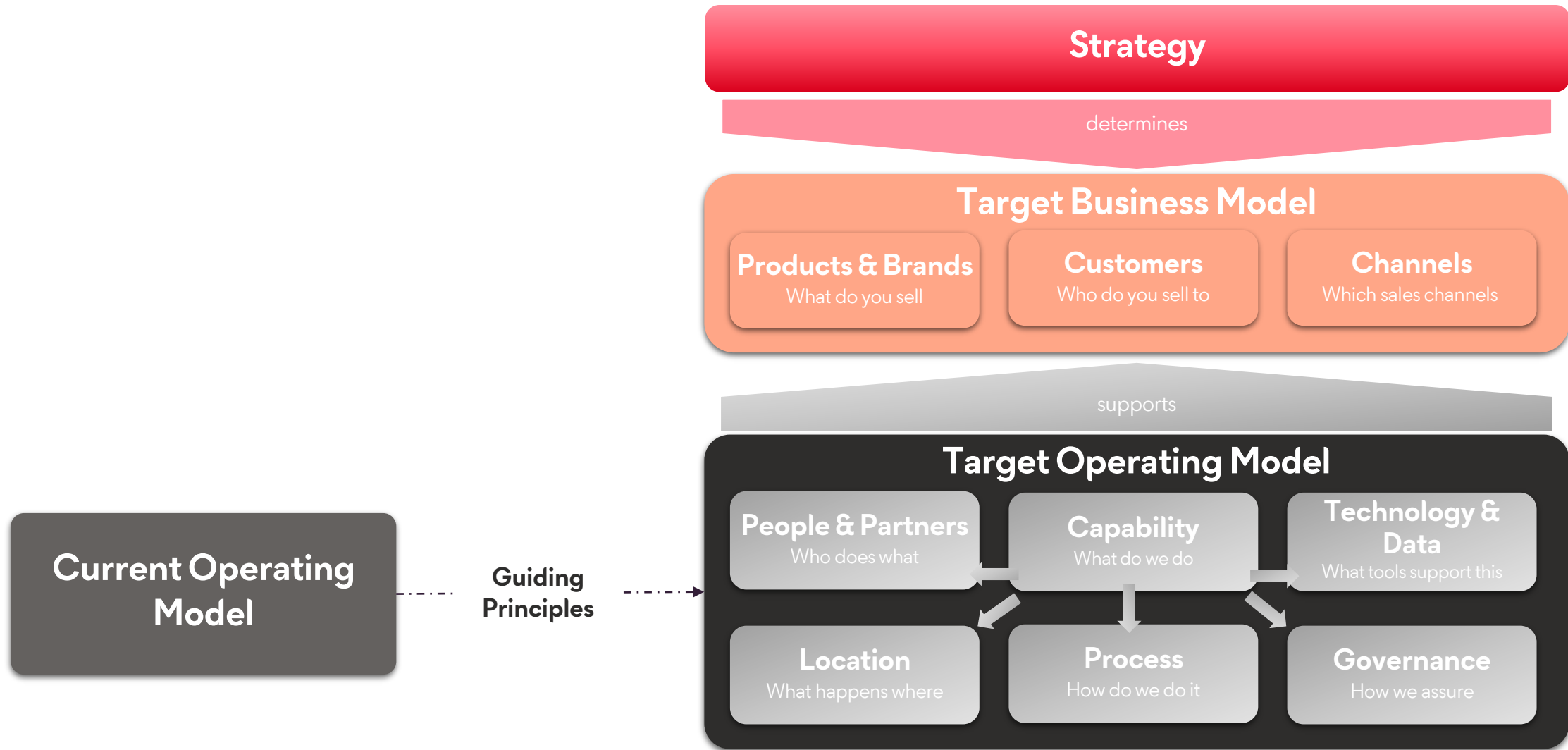
Capability Importance	Definition
Strategic	Strategic capabilities serve as the basis for competitive advantage i.e. , act as a differentiator versus our competitors; providing us significant customer value or a source of economic advantage. There are two types: those which help the organization in the present, and adaptive capabilities which help the organization learn, adapt, and thrive over time.
Core	The capabilities which are important to our customer value or economic position i.e. customer administration and focus predominately on operational excellence or are key enablers for the strategic/differentiating capabilities.
Foundational	All the capabilities which are essential to running a business i.e. facilities and are managed to a industry best practice or norm where there is a level of standardisation can be achieved, they do not offer an opportunity for competitive differentiation

Capability Level	Process	Technology	People
Optimised	<ul style="list-style-type: none"> <li>Process is established, scalable and achieving the quality and volumes needed.</li> <li>Performance is proactively managed via process improvement</li> <li>Process improvements are documented and trained out</li> <li>Process metrics, KPI, SLA in place and reviewed</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive technology enablement and scalability is in place</li> <li>Technology is compatible with organisation architecture principles</li> <li>Continued review of technology underway for continuous improvement opportunities</li> <li>Best in class and best practice reviews undertaken across market – to keep pace with technology advancements</li> </ul>	<ul style="list-style-type: none"> <li>Optimal capacity, skills and competence exist</li> <li>Strong career pathways are in place and well understood by employees</li> </ul>
Effective	<ul style="list-style-type: none"> <li>Process is established and scalable</li> <li>Process is achieving the quality and volumes needed on time and in full</li> <li>Process is fully documented and well trained out</li> <li>Developing metrics</li> </ul>	<ul style="list-style-type: none"> <li>Technology is used to its full capability and meets the majority of our needs</li> <li>Modern technology and technology enhancements and bedded in</li> </ul>	<ul style="list-style-type: none"> <li>Skills and competence are at correct level for meeting capacity</li> <li>Defined career pathways starting to be embedded</li> </ul>
Develop	<ul style="list-style-type: none"> <li>Process tasks are performed and managed according to requirements</li> <li>Processes achieve variable quality as well &amp; differing outputs</li> <li>Processes are not scalable</li> <li>Some process documentation may exist</li> </ul>	<ul style="list-style-type: none"> <li>The technology meets the minority of our needs and does not achieve all of our EA principles.</li> <li>Technology needs to be scaled up to meet future demand</li> <li>Modern technology options under review</li> </ul>	<ul style="list-style-type: none"> <li>Capacity exists but requires development of skills and competence to scale up</li> <li>No defined career pathways exist</li> </ul>
Initial	<ul style="list-style-type: none"> <li>Process is performed ad hoc and depends heavily on the competence and experience of the user.</li> <li>Limited knowledge of performing the process exists within the team</li> <li>Limited or no process documentation exists</li> </ul>	<ul style="list-style-type: none"> <li>There is a distinct lack of technology enablement from existing technology platforms</li> <li>Limited use of modern technology</li> <li>Performance outcomes may be affected (e.g. cost, time, quality)</li> </ul>	<ul style="list-style-type: none"> <li>Skills, competency and capacity all require development</li> </ul>

## Case Study 2 : Alignment Gap



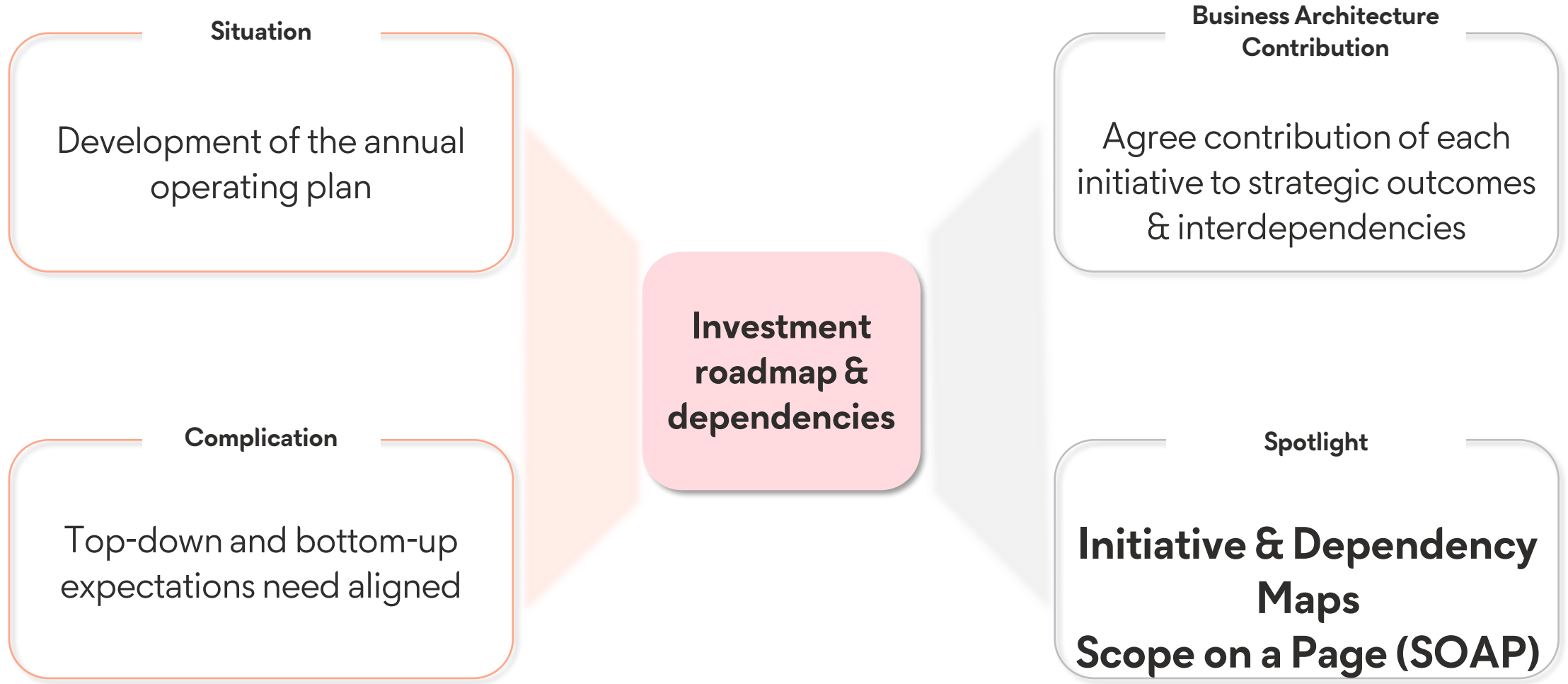
# Operating model framework



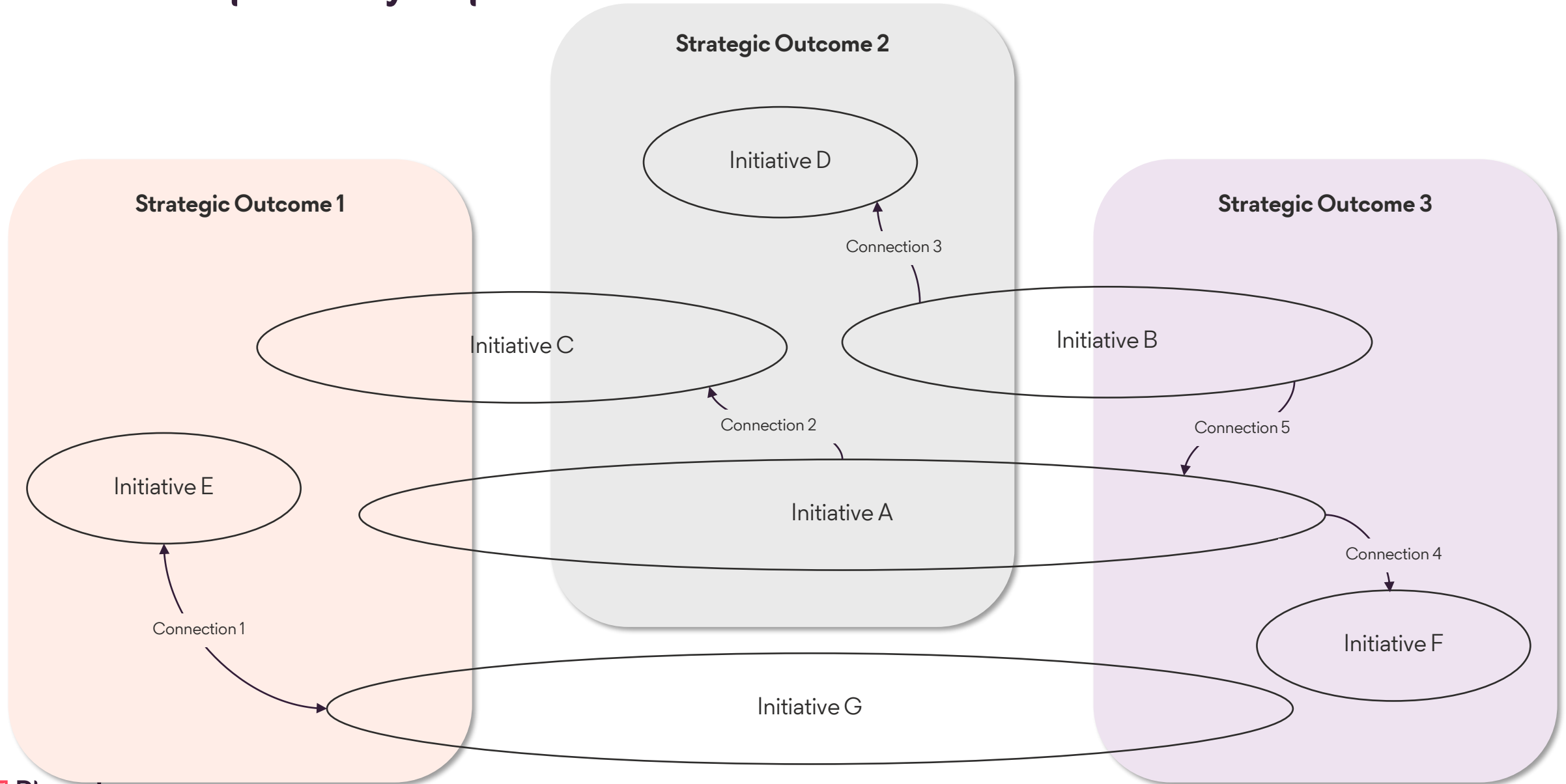
# Principles based evaluation

	Recommendation		
Principle	Option 1	Option 2	Option 3
<b>Overall</b>			
Principle A			
Principle B			
Principle C			
Principle D			

# Case Study 3 : Effects Gap

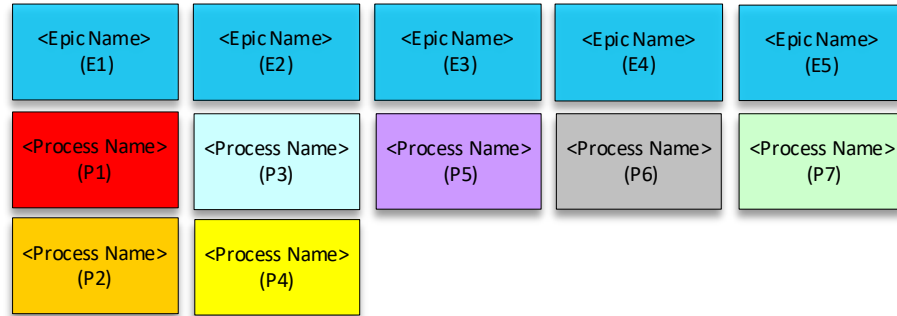


# Initiative & Dependency Map



# Scope on a page (SOAP)

## <Project Name> - Scope on a Page diagram



**Key**

HL Groupings
Enablement only
Some changes
New/Major change
Manual 'process'
Later phase
Not in Scope - No existing functionality
Not in Scope - No change to existing functionality
Project dependency

Next Process Number = P#  
Last Updated = ##/##/20##

[project name] - SOAP Commentary						
Process	Grouping	Process Name	Current Status	Requirement	Commentary/Assumptions	Estimate
P1	<Heading on SOAP>	<Process name on SOAP>	<SOAP Box Colour>	State Requirement (not solution!), i.e. user story	Comments relating to the requirement. This can include current systems used and/or potential solution comments.	
P2						
P3						
P4						
P5						
P6						
P7						

# Summary & Key Takeaways

1

**Closing the 3 gaps is key to successful strategy execution**

2

**Business Architecture can facilitate the bridging of these gaps**

3

**A range of business architecture tools & techniques exist.  
An enterprise-wide capability model is a critical artefact.**

4

**Within Phoenix Group, the SOAP is the key artefact that links  
business architecture and business analyst roles**



**Q&A**



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