

## Role of PM and EA during the Execution Phase

Sam Ishak P.Eng

Director, Strategy, Enterprise Architecture & PMO

First Canadian Title

- Background
- Introduction
- Common Challenges
- Best Practices & Lesson Learned
- Q&A

- ❑ Sam Ishak, Director, Strategy, Enterprise Architecture and PMO of First Canadian Title. Previously, he was the Enterprise Architect of Insurance Bureau of Canada (IBC)
- ❑ ITAC Level 2 Certified Architect by the Open Group, TOGAF 8 certified.
- ❑ Mr. Ishak is the Treasurer of the Toronto Chapter of the Association of Open Group Enterprise Architects (AOGEA)
- ❑ Mr. Ishak has a B.Sc. degree in computer science and he is Licensed Professional Engineer of Ontario (PEng.)

# Background

- ❑ First Canadian Title is Canada's leading provider of title insurance, and other related products and services for residential and commercial real estate transactions.
- ❑ Founded in 1991 and based in Oakville, Ontario, Canada
- ❑ First Canadian Title employs approximately 1000 people
- ❑ Its customers include more than 15,000 lawyers and notaries nationwide, every major Canadian chartered bank, credit unions, other lending institutions, real estate agents, mortgage brokers and builders.

# Common Challenges

- We Don't Need No Architects!
- No Time/Money to go the EA way!
- Who is accountable for the project success?
- Who is leading the project team?

# Best Practices

1

**Establish Business – IT Engagement Model**

2

Proactive Business objectives – IT Investments Alignment

3

Establish PMO and EA Governance

4

Same Reporting Management for (Architecture & PMO)

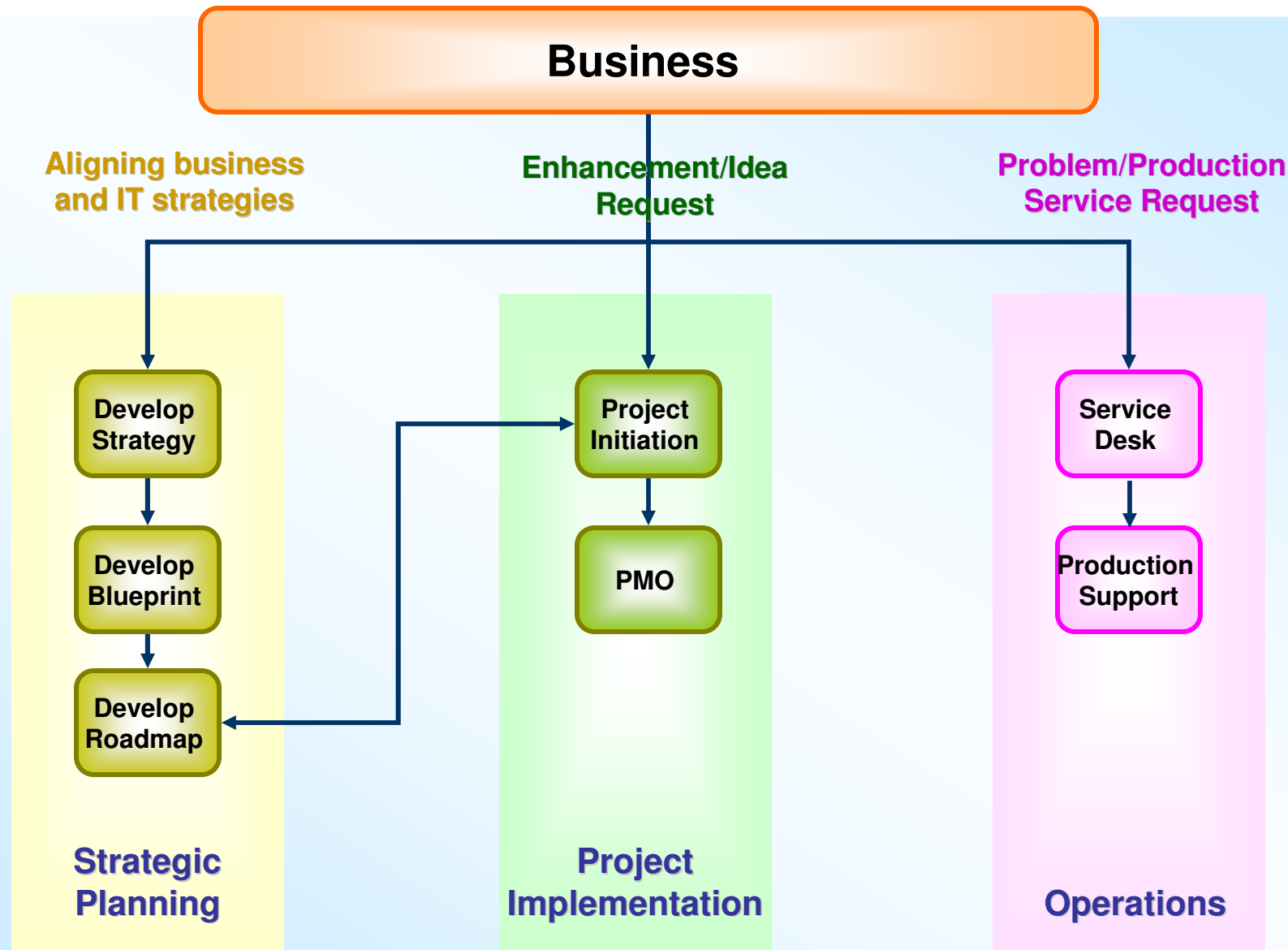
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Define Roles & Responsibilities for EA/SA and PM

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Encourage/Share (Architects/PM) Success Stories

# Business – IT Engagement Model



# Business – IT Engagement Model

Business

Aligning business  
and IT strategies

Develop  
Strategy

Develop  
Blueprint

Develop  
Roadmap

Strategic  
Planning

*Primary focus on developing IT strategy for cross divisional initiatives*

**Rational:**

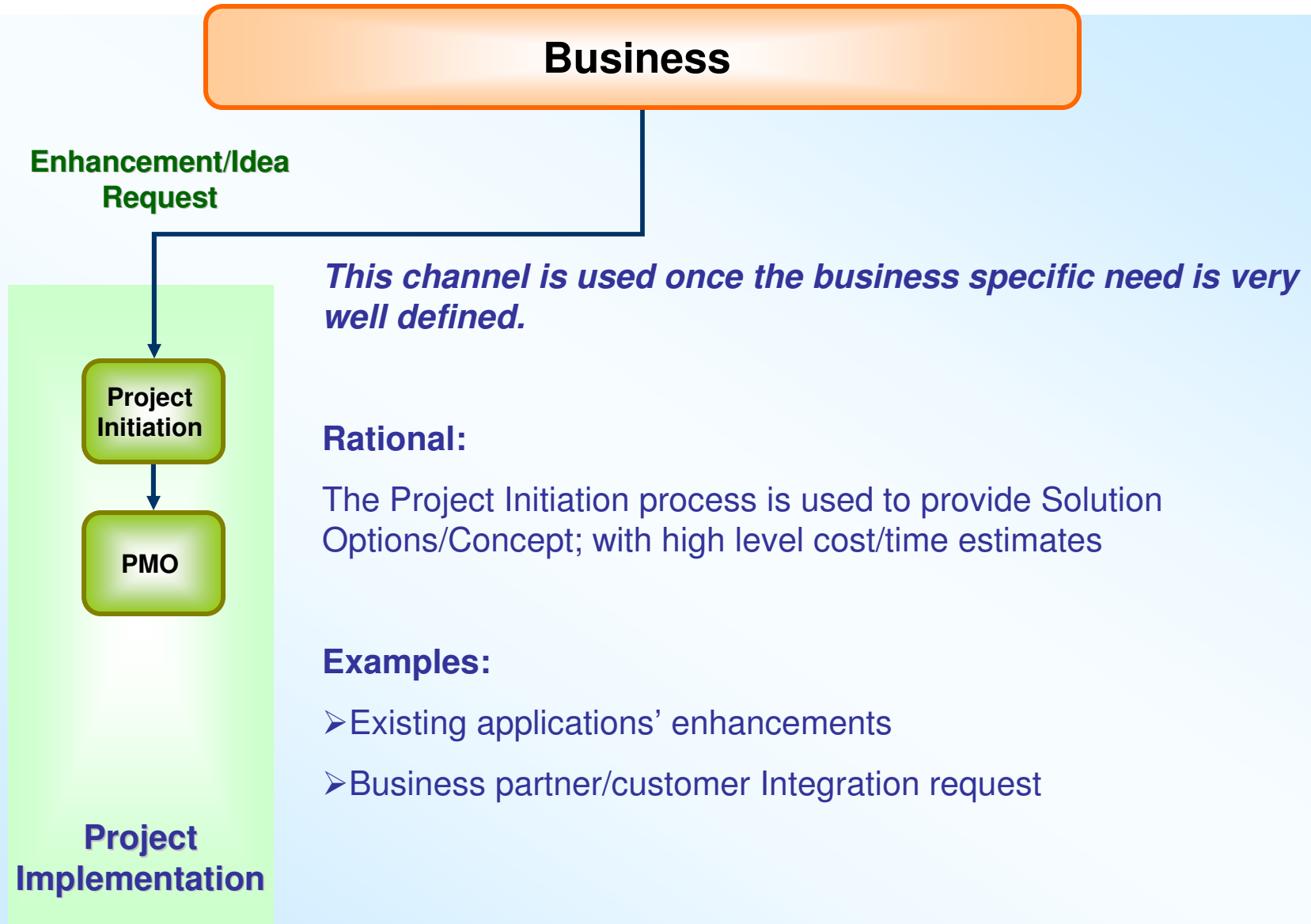
- Enables business agility and growth by aligning Business and IT strategies
- IT strategy is defined by target application blueprint and a roadmap (set of projects defined in a logical build sequence)

**Examples:**

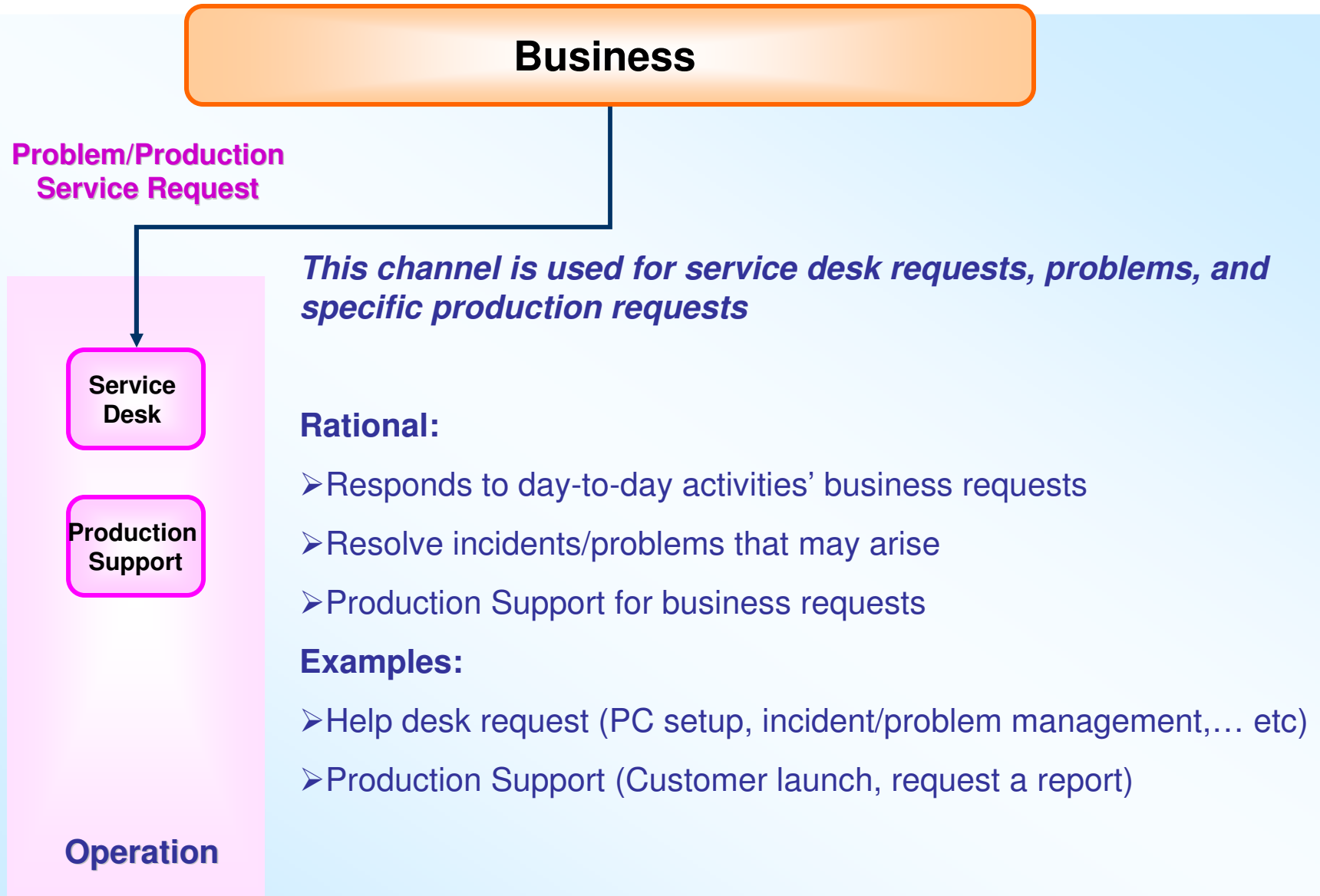
- Business mergers & acquisitions
- Business Process Re-engineering
- Market Competition strategies
- New LOB/Product/Service



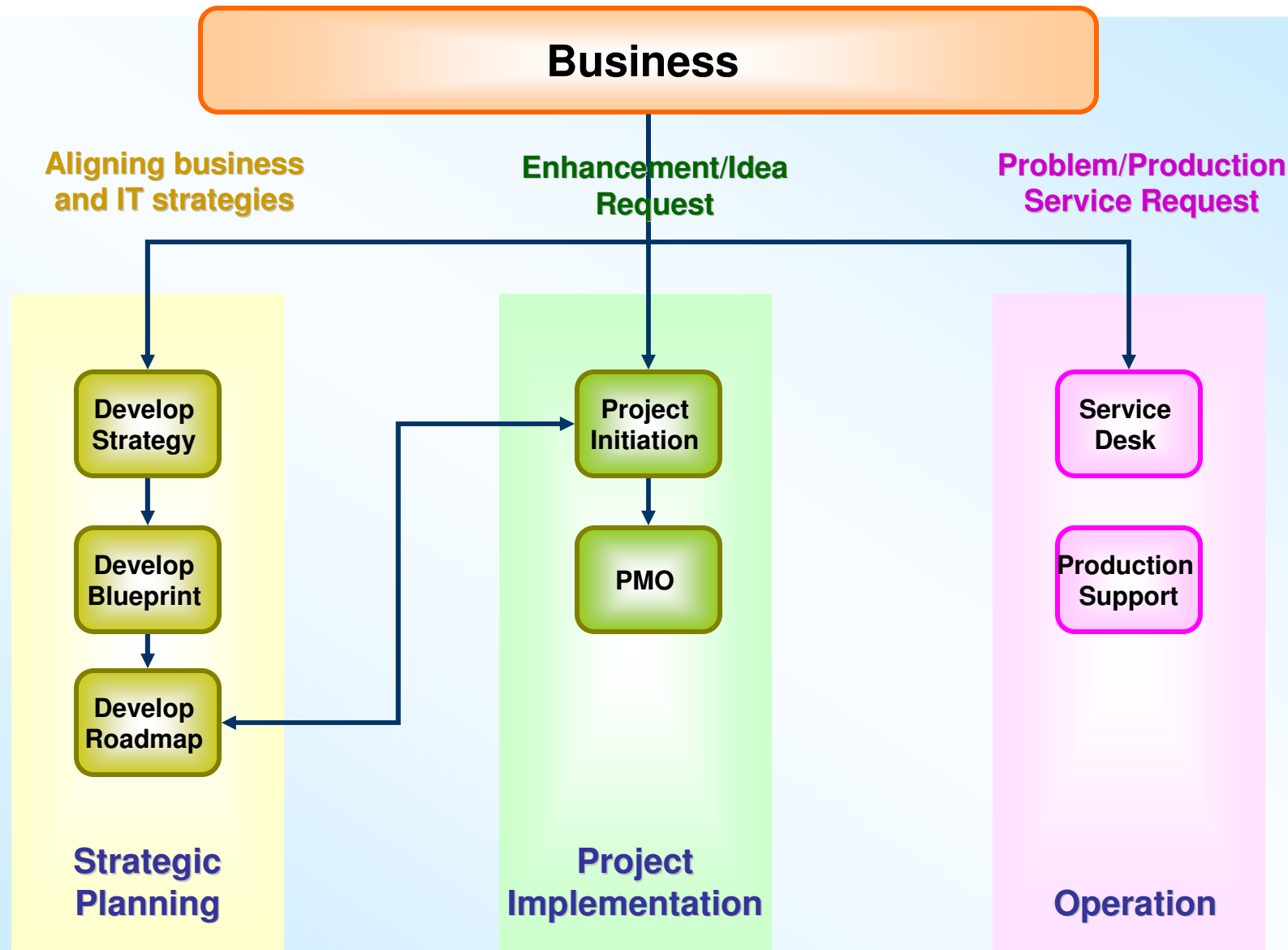
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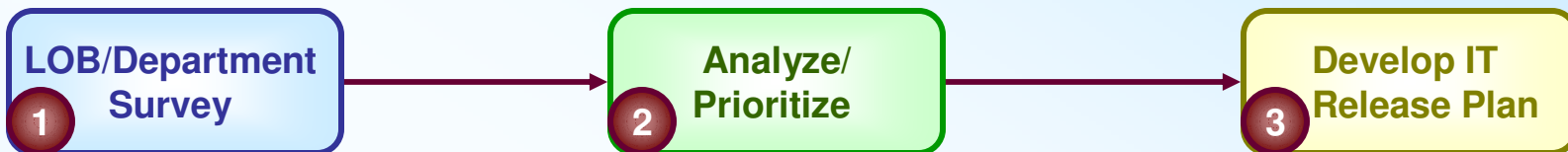
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# Best Practice # 2

## ✓ Proactive Business objectives – IT Investments Alignment (Yearly)



**1 LOB/Department Survey**

- ❑ Each LOB/Department will provide IT Major Goals for 08:
  - ▶ **New** (New LOB's automation)
  - ▶ **Enhancements** (Major enhancements for existing Applications)
- ❑ **Provide priority sequence**
- ❑ **Implementation date Q1 - Q4**

**Get feedback by Mid August**

July 21<sup>st</sup> 2009

**2 Analyze/Prioritize**

- ❑ **Analyze common needs:**
  - ▶ Analyze common needs cross different Department/ LOB's
- ❑ **Decide (ITSC):**
  - ▶ Get ITSC to define enterprise wide priority
  - ITSC Communicate

**By end of September**

23<sup>rd</sup> Enterprise Architecture Practitioners Conference – Toronto

**3 Develop IT Release Plan**

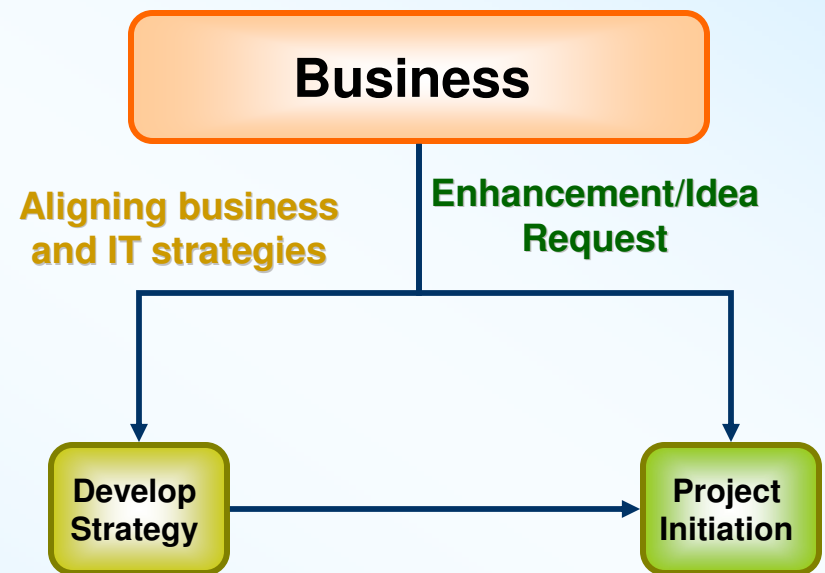
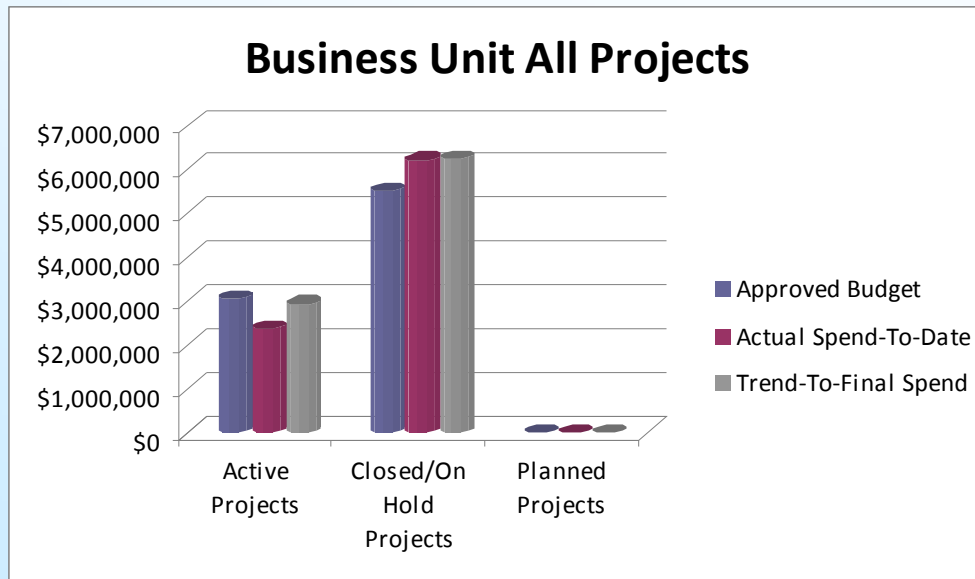
- ❑ **Develop Release Plan :**
  - ▶ List of Top # initiatives
  - ▶ Develop High Level Timeframe (Q1-Q4)
  - ▶ Communicate the IT Release Plan
  - ▶ Maintain the IT Release Plan

**By end of October**

Sam Ishak

## ✓ Proactive Business Objectives – IT Investments Alignment (On Going)

PMs & EA are meeting with each LOB's to discuss Project status, new/future business needs



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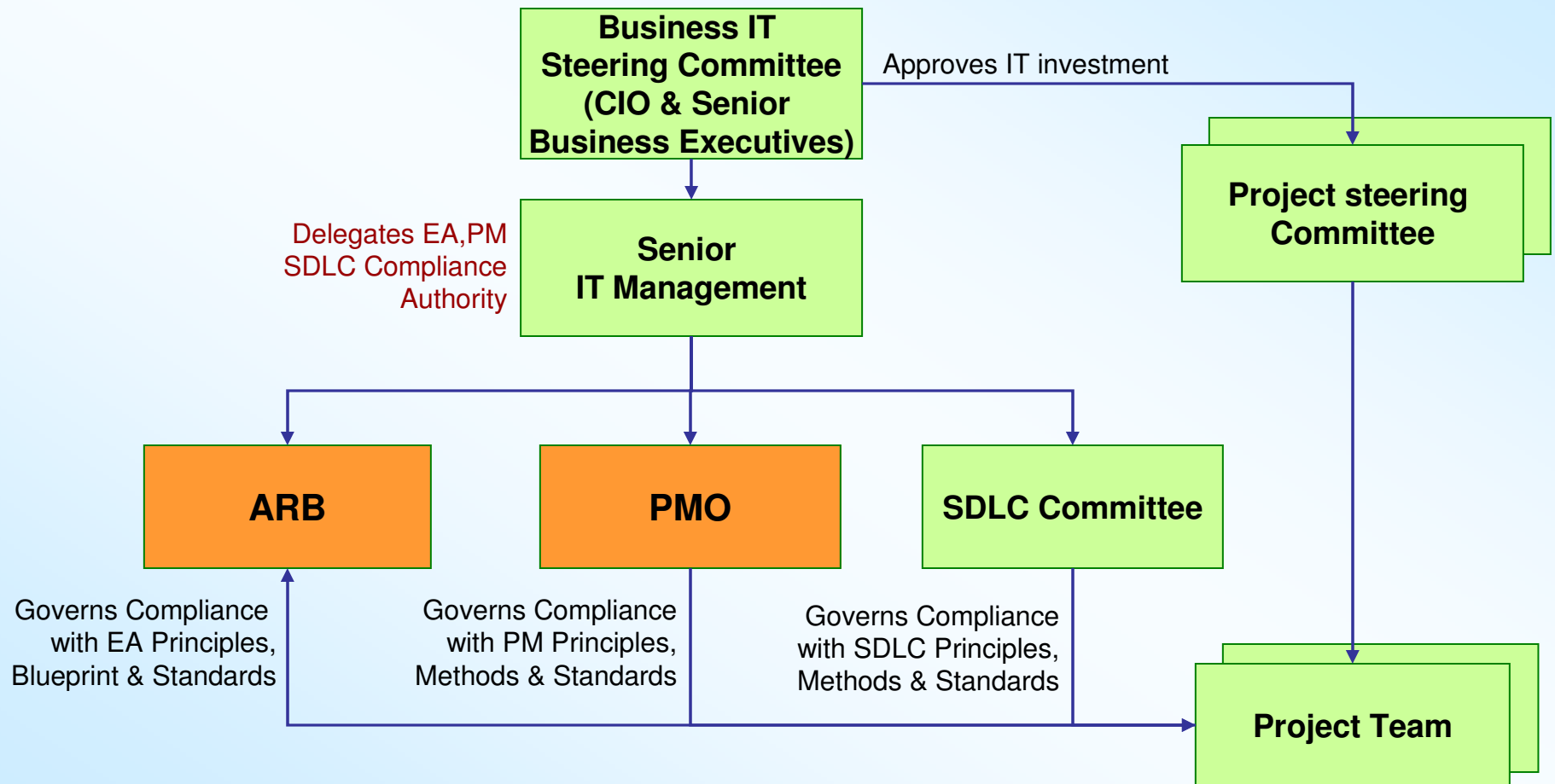
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## ✓ Establish PMO and EA Governance





# ARB Members

## ✓ Establish PMO and EA Governance

		ARB Core Member					ARB Standing Member				Project Rep.		
		Sr. Manager Architecture (Char)	Enterprise Architect	Solutions Architect	Data Architect	Infrastructure Architect	Security Officer	Enterprise Technology Strategist	Development Manager	Database and Reporting Manager	Business Analyst	Business Rep/SME	Project Manager
		<p><b>R</b> = Responsible  <b>A</b> = Accountable  <b>C</b> = Consulted  <b>I</b> = Informed</p>											
1	Assess EA Compliance of the Solutions Architecture	I	A	R	R	R	C	C	C	C	C	I	I
2	Assess Impact of Exceptions to EA	I	A	R	R	R	C	C	C	C	C	C	C
3	Prepare Recommendation ( EA & Project )	I	A	R	R	R	C	C	C	C	C	C	C
4	Formally Approve the Solutions Architecture:	A	R	R	R	R	I	I	I	I	I	I	I
5	Approve Changes to the EA Blueprint, Roadmap and Principles	A	R	R	R	R	C	C	C	C	C	C	I

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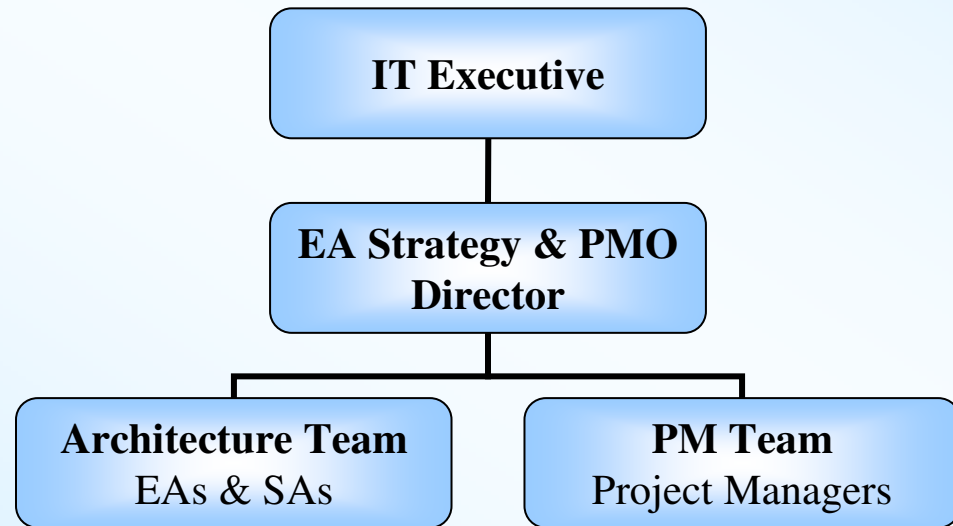
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# Best Practice # 4

## ✓ Same Reporting Management for (Architecture & PMO)

- Provide on going guidance to EA and PM to team up together
- Provide resolution for escalations on case by case biases



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## 4. Define Roles & Responsibilities for EA/SA and PM.

	Project Manager	Enterprise/Solution Architect
<b>Role</b>	▶ PM is the driver, make things happen.	▶ EA is the navigator, own the solutions/architecture decisions
<b>Engagement</b>	▶ Once the project is approved.	▶ Before the project starts (provide solution concept)
<b>Responsibility</b>	▶ Govern the \$, Time and Scope	▶ Govern the quality of the solution
<b>Liability</b>	▶ Ends by the project delivery + warranty period	▶ Responsibility goes beyond the project timeframe, ends by achieving

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## 6. Encourage/Share (Architects/PM) Success Stories

Business Architect – Solid business understanding

EA Architect – Maintain big picture, keep target EA architecture in mind for projects' solutions

Solution Architect – Solid technical background

PMs – lead by influence, controls \$/Time and Scope

## Team Build Events & Share Collaboration Success Stories

## ❑ **Best Practices:**

1. Establish Business – IT Engagement Model
2. Proactive Business Objectives – IT Investments Alignment (Yearly/On Going)
3. Establish PMO and EA Governance
4. Single Reporting Management for (Architecture & PMO)
5. Define Roles & Responsibilities for EA/SA and PM.
6. Encourage/Share (Architects/PM) Success Stories

## ❑ **Questions & Answers**

**Thanks for Listening**

For more information, feel free to contact Sam Ishak at:

[SAISHAK@FIRSTCDN.COM](mailto:SAISHAK@FIRSTCDN.COM)