

eBook

How to Customize or Simplify TOGAF 9



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Adapting TOGAF - Customize and Simplify

If there is one mantra that gets repeated throughout the TOGAF documentation it is that TOGAF needs to be adapted to meet your needs, and that doesn't necessarily mean adapting it once to meet your overall needs! The Open Group make it quite clear that you might need to adapt TOGAF every time you use it.

There are some guidelines in the TOGAF documentation for adapting TOGAF, so in this White Paper I am going to quickly point out the relevant sections, but then move to provide a simple summary of how you might customize or simplify TOGAF to meet your exact needs. [I've provided references to sections in the TOGAF documentation in square brackets]



In the TOGAF 9.1 Documentation

Here are the parts of the TOGAF documentation that cover tailoring the material to your needs:

- Let's start with the Enterprise Continuum. Although this can seem confusing, the Enterprise Continuum is simply a way of classifying any artifacts or resources that might be useful. It also explains the overall process of customizing TOGAF to your needs. If you think of the TOGAF documentation itself as being a Foundation Architecture body of knowledge (which is at the left hand side of the continuum), then anything in TOGAF might need to be adapted to meet your enterprise-specific needs (at the right hand side of the continuum). TOGAF is generic – you need a specific version of this to meet your needs. [39.5]

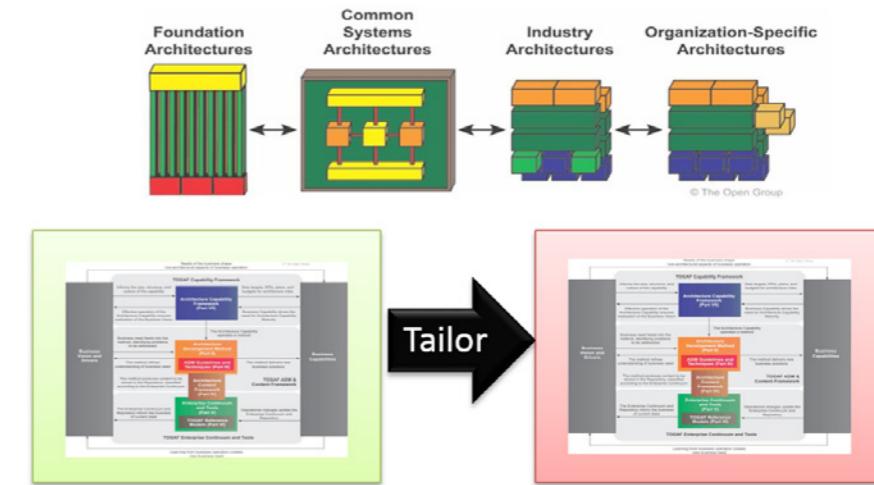


Figure 1: Using the Enterprise Continuum

- TOGAF suggest that you carry out any customization or simplification during the Preliminary Phase. One of the steps [6.4.5] is “Tailor TOGAF and, if any, Other Selected Architecture Framework(s)” – but TOGAF doesn’t really tell you how to go about doing this (which is what I’ll go on to cover)!
- Deliverables should also be customized to your needs [36].
- And the ADM itself might need to be customized depending on several considerations [5.2.1; 5.3; 18.1; 19; 20; 21; 22]

As you can see from the references, the guidelines for adapting TOGAF to your needs are strewn across several parts of the documentation. So let's summarize this scattered content into a more concise guide.

A Simple Guide to Customizing TOGAF

- The maturity of the EA team and where EA is positioned within the organization are the most important initial considerations for using TOGAF (or any other EA approach). It is therefore important to assess this maturity, and for this TOGAF provides a basic EA maturity model [51]. But it is worth pointing out that this maturity model may not cover all of the important factors – so you may want to start by tailoring that to meet your needs. For example, you might want to assess the maturity of your EA skills.
- Think about the nature of your enterprise architecture. Is your company a large and complex one, made up of many separate but interlinked “enterprises” within an overall business framework, or do you have a single enterprise architecture that covers all business units? You may need to adapt TOGAF for:
 - Top-down planning and development across a whole interconnected meta-enterprise as a single entity. This can be difficult to achieve without a very mature EA practice.
 - Development of a “generic” or “reference” architecture, which can then be adapted for specific project or sub-enterprise needs.
 - Developing a specific architecture for one part of the enterprise and cloning this to other areas.

- The Enterprise Continuum is a good starting point, but like everything else, you may need to customize it first. If your company covers multiple geographic areas, then it might be useful to add Location Architectures between Industry and Organization-Specific to cover regional needs. You may also want to extend the Enterprise Continuum to the right, to allow for architectural zones within an Enterprise; for example, if your company is a holding company spanning discrete brands which have their own separate architectures. [39]
- The next thing to bear in mind is something that TOGAF don’t emphasize enough: that there is an overhead every-time you customize something generic to meet a more specialized need. For example, if you use a generic retail industry architecture data model, but then customize it, you incur an overhead in keeping your customized components aligned with the industry standard. Be pragmatic in your use of TOGAF.
- The material in TOGAF is quite good, but it certainly doesn’t cover everything and doesn’t include many contemporary EA techniques. Some might argue that it doesn’t explain fundamental techniques, like use of frameworks, taxonomies or patterns, in much detail. So you will probably need to supplement TOGAF with material from other EA frameworks and approaches [2.10].

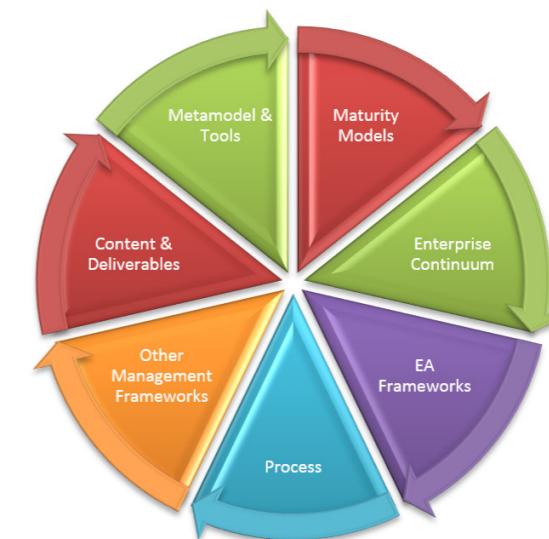


Figure 2: Key Things to Adapt

- Because every project is different, you need to consider customizing TOGAF (or any other EA resource) every time you use it. TOGAF refer to this as creating the right Architecture Capability – meaning the particular combination of skills, tools, resources, artifacts, governance, and processes that are required to meet the demands of a specific Request for Architecture Work. This is a step in the Preliminary Phase [6.4.5], but in practice you may need to adapt TOGAF at any time during a project.
- TOGAF describe three areas that need to be tailored (note that process and content are covered in more detail by later bullet points in this White Paper):
 - **Terminology;** to produce an agreed language for describing architectures.
 - **Process;** to add organization-specific tasks and checkpoints, to align processes with other management frameworks, or to remove tasks that are carried out elsewhere.
 - **Content;** to support organization-specific requirements.
- You also need to think about what frameworks you are going to use to develop and evolve the enterprise architecture. TOGAF is actually a framework of frameworks – there is one overall framework and then multiple frameworks covering, for example, Content, Capability, and Process. You will need several frameworks to guide your architecture work, and each of these should be tailored to your exact needs.
- Think about why you are using TOGAF. TOGAF describes the different types of architecture engagement that may occur at different levels of the enterprise; TOGAF refers to three distinct levels in the Architecture Landscape [20] – Strategic, Segment, and Capability. For example, at the Strategic Level, defining the overall evolution of the enterprise, might focus more on the early phases of the ADM.
- If you are using a specific “style” or approach, such as SOA, then you may need to supplement TOGAF with additional reference materials or steps. TOGAF specifically mentions SOA [22] and Security Architecture [21], but there are many other considerations that you might need to include, such as architectural issues for Cloud, Mobile, or Social Media.
- TOGAF talks mainly about adapting the ADM [5.3]; this is what the guidelines in Part III of the documentation cover. But it is important to consider adapting other relevant sections of TOGAF and not just the ADM.
- TOGAF starts by describing the ADM as if it were a linear or waterfall process, but in practice EA is very rarely a sequence of tasks. TOGAF introduces iteration [19] as a way to explain the ping-pong nature of EA activity. This can labour the key point: that you may need to carry out any of the phases or steps in the ADM in a different order than that described in the TOGAF documentation, and you may need to revisit tasks that you have already completed.
- The TOGAF documentation talks about whether you need to complete the baseline or target first. In practice, this is something that becomes clear as you engage in a project, and is typically not a clear cut decision for one approach versus the other. In many cases you will work on these in parallel.
- At this stage, you may want to revisit the issues that TOGAF lists as considerations for adapting the ADM [5.2.1]. These points are really to do with how you scope or partition EA for the task in hand. Partitioning is used more as a high-level planning tool to help manage the overall evolution and direction of the enterprise. Scoping tends to apply more to a particular Request for Architecture Work. TOGAF lists some of the basic considerations: the breadth of enterprise coverage; the level of detail; the overall time available; intermediate time periods; and the architectural assets that can be leveraged, including internal and external assets and the use of other frameworks and reference models.

- You may also need to consider:
 - political considerations;
 - the involvement of partners, vendors or consultants;
 - the maturity of the EA team;
 - a practical assessment of available resources & skills;
 - the value that can be realistically delivered;
 - or any other considerations that have an impact on how effectively you can use TOGAF.
- TOGAF doesn't operate in isolation, so it needs to fit in with other corporate processes. So look at how TOGAF complements and supports program management -including authorization, risk management, business planning and budgeting, development planning, systems development, and procurement. Consider links to project and service portfolio management processes; to project lifecycle; to operations handover processes; to operational management processes, including configuration management, change management, and service management; and to procurement processes. If your organization is using any other standard management frameworks, such as ITIL, CMMI, COBIT, PRINCE2, PMBOK, or MSP, then handovers and checkpoints need to be integrated with the way that you are using TOGAF.
- The TOGAF Architecture Content Framework, Content Metamodel and Architectural Deliverables [36] are a reasonable starting point for thinking about the coverage of your enterprise architecture and the outputs that you will produce, but they are far from perfect. You will need to adapt them to match the language used in your enterprise, the metamodel of any tools that you are using, and the type of outputs and deliverables that are expected by the stakeholders in your company.
- The metamodel is particularly important, as this is the mechanism that brings all architecture components and building blocks into a cohesive whole. TOGAF provides extension modules which are optional and should be selected during the Preliminary Phase, but these are only suggestions! Further tailoring will be needed to match the language used in your enterprise and other metamodels (for tools or other methodologies).
- You may then need to tailor any tools to align them with your metamodel and any changes you have made to the ADM.
- Finally – look at how you can simplify your use of TOGAF. There are some obvious situations – for example, if you are a small-to-medium enterprise, if you wish to use a “cut-down” method with a reduced level of resources, or if you are outsourcing any of the phases.

Conclusions

If you think of buildings and their architecture it is clear that each building is unique. This is also true for each enterprise - every enterprise has a unique enterprise architecture. To develop, maintain and change your enterprise architecture, you therefore need to customize TOGAF so that it accurately meets your needs. In this White Paper we have produced a simplified checklist of the key considerations you need to make in adapting TOGAF.

About Roger Evernden

Roger Evernden has been an Enterprise Architect since 1984, specializing in the highly practical use of EA to manage enterprise transformation.

He acts as advisor, mentor and coach on enterprise architecture initiatives, leads training workshops, and writes regularly about strategy and architecture. His work has been the basis for more than 400 business and IT architecture initiatives worldwide. As author of the Information FrameWork (IFW) – an architecture framework originally developed for the financial services sector – Roger pioneered many contemporary techniques, including the use of industry reference models, business capability analysis, and component-based architecture building blocks.

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