

LeanIX Roll-out & Adoption Toolkit

LeanIX Enablement

1. **Introduction to LeanIX Roll-out and Adoption**
2. **Awareness & Desire: Plan and prepare LeanIX roll-out in your org**
 1. EA Governance and stakeholder groups
 2. Roadmap and training plan for successful roll-out and adoption
 3. Communication and Announcement Mail Templates
3. **Knowledge & Ability: Enable non-EA users on LeanIX foundations**
 1. Training session Templates
 2. Sharepoint/Confluence Documentation Template
 3. How-To Video Tutorials
4. **Reinforcement: Enable non-EA users for continuous LeanIX use**
 1. Workspace personalization
 2. Dashboard & Gamification
 3. Advanced EA Governance
 4. *Playbook & Academy Course for non-EA users (in Q2/Q3 2024)*
5. **Other useful LeanIX Enablement Resources**



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Introduction to LeanIX Roll-out and Adoption

Why

Every LeanIX roll-out is a change management and enablement challenge as the tool relies on strong data quality and maintenance, as well as adoption in business processes from a wide community. The success of your LeanIX implementation and use depends on how well stakeholders adopt, are enabled and align LeanIX with your business processes – many tasks which happen outside the LeanIX tool.

What

This **toolkit provides guidance, best practices and templates** based on learnings from leading LeanIX customers that support the roll-out and successful adoption of LeanIX. It uses the **ADKAR framework** to follow a methodology of approaching your colleagues in a sequence to achieve sustainable change

How

- **Read the guide carefully** to learn from best practices
- **Leverage templates and hands-on material** that you find useful and adapt them to your organization's context, culture, terminologies and EA strategy
- **Reach out in the [LeanIX Community](#)** for questions and share your experience

Templates are marked with a yellow box and downloadable in the attachment sections

Overarching Principles and Guidelines for successful roll-out

Do's

- Find a **C-level senior sponsor** for LeanIX to advocate in the organization
- Define and align on **clear data maintenance and governance processes**
- Outline **"why" and value to end-users** in a role-specific way
- Offer classroom enablement and self-paced materials
- **Customize templates** to your own company terminologies and to-dos

Don'ts

- Don't swamp organisation with e-mails but rather prepare and plan proper roll-out with proper communication
- Don't expect end-users to have same use cases or understanding of EA and LeanIX as your core team

Best practices for user adoption

What do our most successful LeanIX Customers do?

★ Covered in toolkit

Learning & Knowledge Management

- ★ **Training Sessions**, Demos and Webinars (live and recorded)
- ★ **Custom Intranet/Wiki** for user guide and product documentation
- ★ **Short How-To videos** for explaining quick activities
- **Customized LeanIX Learning Paths** in internal LMS (Learning Management Systems)
- **Customized LeanIX Playbooks**

Workspace Personalization

- ★ User-centric dashboards & branding
 - Meta-Model Configuration
 - Automations & Notifications

Monitoring and transparent tracking

- ★ Dashboards
- ★ Gamification initiatives

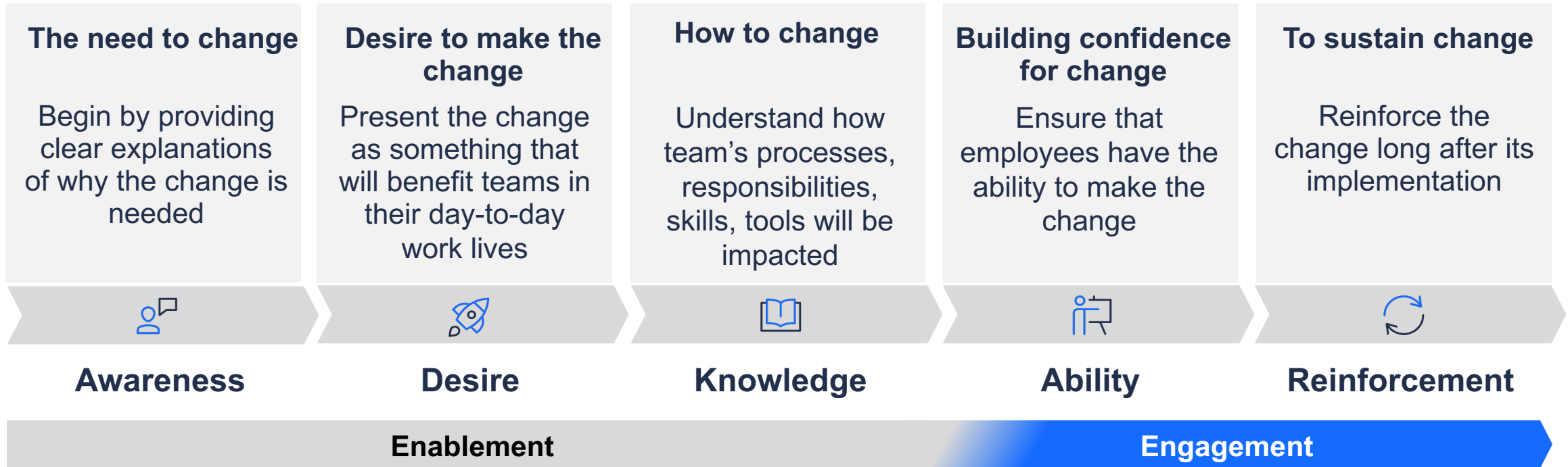
Communication and announcements

- ★ **Regular e-mail communication** / product newsletters
- **Posters/Screensavers** that promote LeanIX

Community building

- **MS Teams / Yammer / Slack Groups** focused on LeanIX and EA
- **Regular community events** to ensure your team and community stays in sync
- Internal dedicated **LeanIX support channels or mail**
- **Office hours** to host Q&A on LeanIX

Driving LeanIX adoption with ADKAR model



ADKAR

An acronym for the five outcomes an individual needs to achieve for a change to be successful.¹

Key Prerequisites

- Initial data import in workspace
- Key stakeholders for change identified
- Milestones for change plan identified

Stakeholders

- Enterprise architects
- Application owners
- Business domain owners
- Solution architects
- Others (depending on use case)

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How to plan and prepare your LeanIX Roll-out and Adoption to the organization

Why

The first introduction to LeanIX for non-EA users is decisive in stickiness – therefore we advise to carefully plan and prepare the roll-out and adoption to provide a valuable experience to all users. As you encounter different users within your organization, it is best practice to phase your roll-out and personalize clear communication / announcements at the right time.

What

Raise awareness and desire among key user and stakeholder groups

- EA governance and stakeholders
- Template for a roll-out roadmap and training plan
- Communication / Announcement templates

How

- Understand your (IT) organization: Who are important stakeholders and what is their role and use with regards to LeanIX?
- Create a roadmap plan: When and how to enable the different user groups for max. adoption?
- Ensure good and concise communication / announcement via Mail / outside of LeanIX by adapting the HTML Email files, ideally get management support

EA Governance: Roll out LeanIX in layers within your organization and community

! **Phased approach of roll-out to maximize adoption in each user group**

Senior sponsor

Core

Contributors

Primary consumers

Secondary consumers

Management sponsorship: Crucial for implementation and commitment of teams, leverage for call-to-actions and convincing stakeholders, regularly monitors progress/results

Core team for LeanIX: Responsible for LeanIX in your company, core users and thought leaders of EA practices and standards company-wide

Extended team of Fact Sheet Owners: Contributors to LeanIX whose input is required for data quality, need to understand and make use of value of LeanIX

Wider community of adjacent users: Consumers of LeanIX, need information or can leverage features for daily work, need to grasp high-level value of LeanIX

Full organization of all users: Consumers of LeanIX, use information opportunistically, need to grasp high-level value of LeanIX

Onboarding

Onboarding

Wider Roll-out

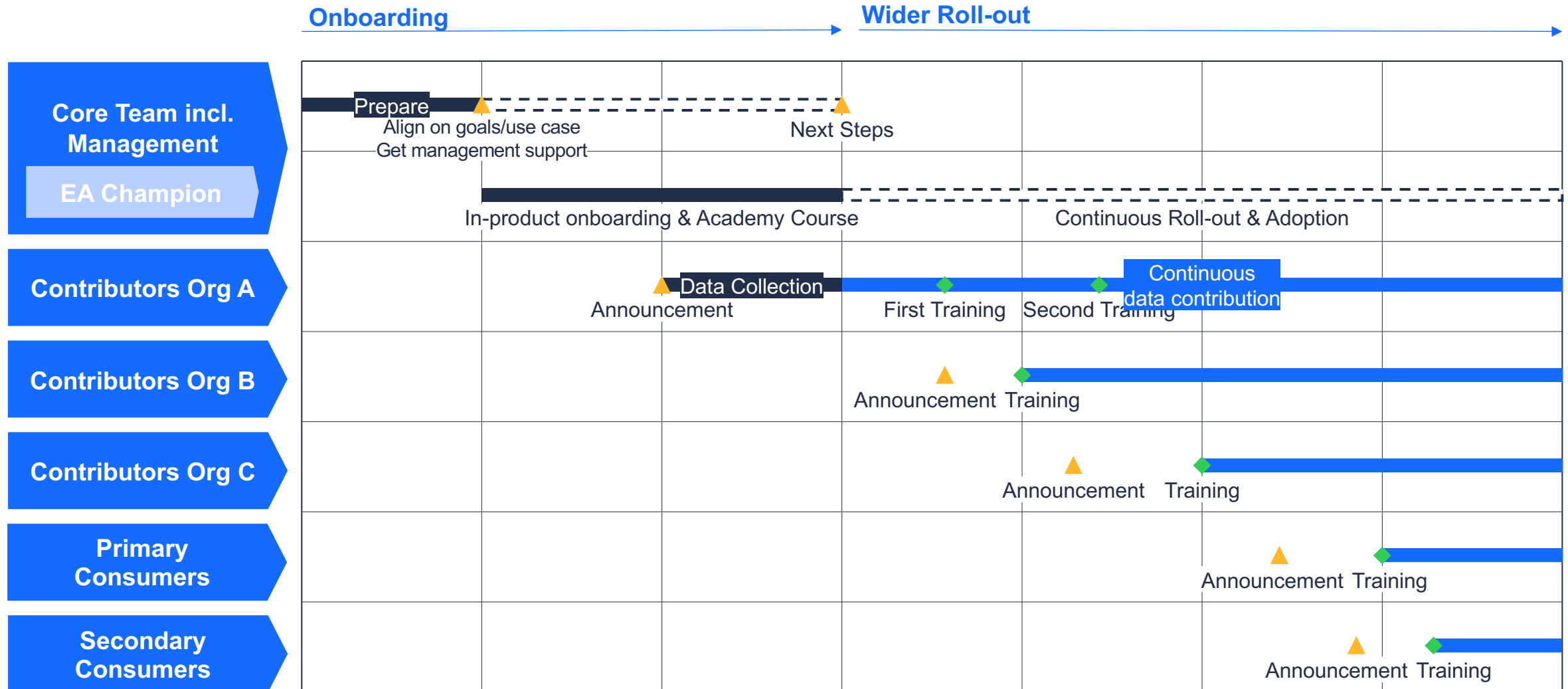
Wider Roll-out

EA Governance: Identifying and understanding users within your organization and community



 Use these motivations as a guideline how to showcase the value of LeanIX to specific roles and what each individual can do with LeanIX

Template: Roll-out roadmap and training plan



Template: Communication about LeanIX



Announcement and data collection

Dear colleagues,

we would like to announce the launch of **LeanIX**, a new **Enterprise Architecture Management tool** to bring transparency into our IT landscape and plan our systems in line to our business priorities and strategy. This initiative is sponsored by **[Name of Senior Sponsor]** who is very excited to bring Enterprise Architecture at [Company] to the next level. [Potentially add company goals here]

To get started with the tool, we need all hands on deck and require your participation in the launch of the tool. We are sending you relevant information and a call-to-action with this email. Please read carefully through all the information and provided guidance and complete the tasks.

Introduction to LeanIX

- [What is LeanIX?](#)
- [LeanIX Walkthrough](#)
- Access to LeanIX [workspace link]: please log in (with SSO)

Data Collection – Action required until [Deadline XX.XX]

In order to fill Application data to LeanIX, we would like for you to provide first-hand data on the Applications you are responsible for. We have already assigned you to the Fact Sheets in LeanIX and require you to enrich data until [Deadline date XX.XX.XXX].

Here are your steps to complete:

- Understand [the attributes of an Application Fact Sheets](#)
- [Option 1] Fact Sheet Owner Onboarding Dashboard
 - Walkthrough your Onboarding Dashboard [provide Link]
 - Filter the inventory to find selected Fact Sheets [provide video]
 - Fill an Application Fact Sheet [provide video]
- [Option 2] LeanIX Surveys: You will receive a survey from LeanIX to provide data, here is guidance on [how to respond to a survey](#)
- [Option 3] Application data in Spreadsheets: Filter your applications in the attached Excel sheet under your name and respond to this email to provide:
 - Name
 - Description
 - Lifecycle Status
 - Business Criticality
 - Functional Fit
 - Technical Fit

Data Maintenance

As continuous use of LeanIX, we ask you to take full ownership of your assigned Fact Sheets and regularly check quality and maintain data when attributes are changing or updated. This will help to keep LeanIX as single source of truth and usable quality to plan IT.

LeanIX and the EA team will provide several mechanisms to govern data maintenance and remind you in the future.

1. Own the quality seal: this is a status in LeanIX to approve data quality. Whenever you receive a notification to check a quality seal, please have a quick look and approve or deny any updated changes. Here is further guidance on [setting the Quality Seal](#)
2. Continuous data maintenance: Whenever you are making changes on Applications, please ensure to update those in LeanIX once executed to keep data current and reliable for everyone. In addition, we will trigger an inventory updated every [X] months to ask for an overall data quality audit.
3. Further data collection: We will start collecting further attributes to complete new projects (e.g., 6R Assessment, Data Objects, Interfaces or IT components) - if you are asked to contribute data, please support the initiatives with priority.

Additional Resources

For questions or exchange, please refer to following channels:

- [xxx@xxx.com](#)
- Join MS Teams / Slack channel:

Thanks for your cooperation!

Continuous data maintenance

Dear colleagues,

As continuous use of LeanIX, we ask you to take full ownership of your assigned Fact Sheets and regularly check quality and maintain data when attributes are changing or updated. This will help to keep LeanIX as single source of truth and usable quality to plan IT. This initiative is sponsored and monitored by [Name of senior sponsor] to meet our company objectives.

Data Maintenance – Action required until [Deadline XX.XX]

Access to LeanIX [workspace link]: please log in (with SSO)

Here are your steps to complete:

- **Check the mandatory fields**
 - Name
 - Description
 - Lifecycle Status
 - Business Criticality
 - Functional Fit
 - Technical Fit
- **Approve the quality seal:** this is a status button in LeanIX to approve data quality. If all data provided is correct, make sure to set the button to "Approved". Here is further guidance on [setting the Quality Seal](#)

Additional Resources

For questions or exchange, please refer to following channels:

- [xxx@xxx.com](#)
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Thanks for your cooperation!

E-mail templates in attachment sections

Tips and Tricks to create further awareness & desire across organizations

Screensaver

- Use the opportunity to customize screensavers to transport messages and announcements of LeanIX to specific target groups
- Instructions: Create Screensaver Templates and align with your internal IT to show specific screensavers to your colleagues

Posters (offline)

- Create more awareness with posters in the relevant department floors

Key stakeholders

- Introduce key stakeholders (VP / SVPs / IT department heads) to LeanIX and inform of purpose, benefits and why use of LeanIX is powerful and transformative
- Let them cascade LeanIX as new Enterprise Architecture Management tool into their teams

All-Hands Meetings

- Leverage company-wide meetings or department town-halls to announce and introduce LeanIX

Example for a Welcome Dashboard

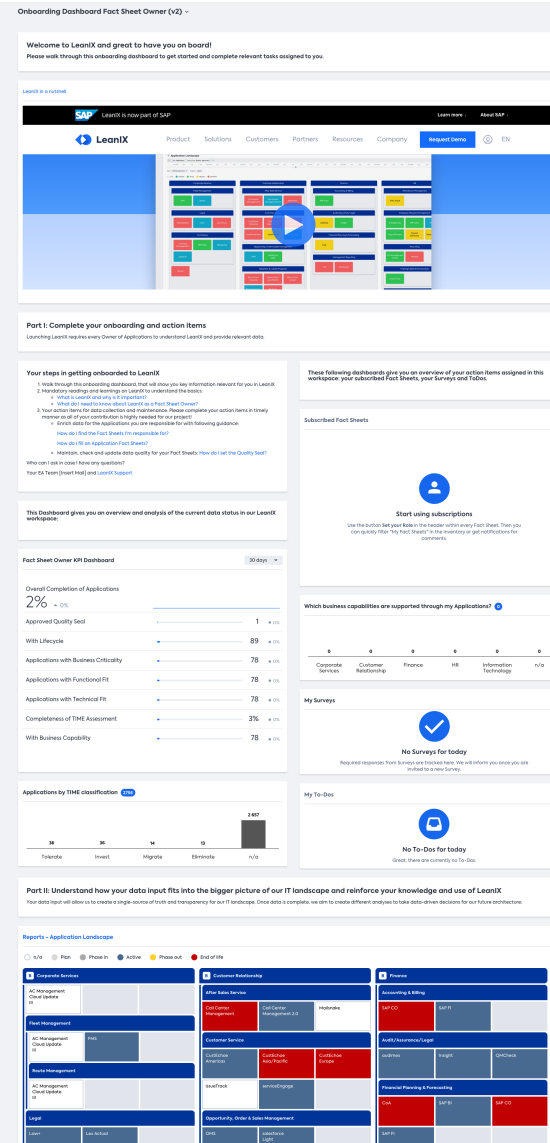
Welcome message with embedded video

Quick links to important enablement content

KPIs

Application Landscape as a whole

Documentation embedded



Quick links to My Subscriptions, My Todos and My Surveys

LeanIX Data Governance: Best practices in involving data contributors (Fact Sheet Owners)

Please check out our micro-course on “[Application Ownership Model](#)” in our LeanIX Academy

Preparation

- Define and publish IT Strategy and Goals linked to Business/Company Strategy; EA Vision, Purpose and Goals
- Confirm and align on definition of roles and responsibilities for Subscriptions such as Application Business Owner and Application Technology Owner
- Acquire organization chart that includes business and technology roles & responsibilities for applications and the functions/businesses they serve
- Confirm and align on target dates for data completion, process to regularly review data quality and how progress will be reported to senior leadership regularly
- Meet with appropriate leaders in the organization to review and commit to rationale, approach, assignments, and action plan

Identification & Assignment

- Identify candidates for Application Business Owner and Application Technology Owner roles in organization
- Application Business Owner should be:
 - Product Owner (if exists)
 - Business user who owns budget for App (if exists)
 - Business user whose goals are most aligned with what app does from a domain/process perspective
- Application Technology Owner should be:
 - Team Lead for App (if exists)
 - Technology user who works on the team that builds/supports/maintains this Application
- Go top down starting at the functional head for the organization if unclear (e.g., assign all Finance related apps to CFO and let them advise on whether others should be assigned: Compliance, Risk, etc)

Communication & Enablement

- Clarify expectation for initial phase of data entry/review and confirmation of accuracy (e.g., 2 weeks, 1 month)
- Clarify expectation for regular maintenance of accurate data (e.g., every release, monthly, quarterly)
- Clarify expectation on what happens if owners do not perform roles (e.g., incentives, escalation to managers)
- Prepare enablement library in Sharepoint, internal community channels, live trainings, etc.
- Draft communication outlining role definitions, expectations, plan, dates, and importance to vision and strategy
- Invite owners to LeanIX

Data Quality Assurance

- Publish reminders to App and Business Owners and copy direct managers and/or senior leadership
- Publish reports to senior leadership showing gaps/progress
- Schedule a regularly recurring meeting with senior leadership to review gaps/progress on data quality

LeanIX Data Governance: Best Practices in setting your Subscription Roles

Subscription Model: by Functional Responsibility

Role	Fact Sheet Type	Subscription Type	Comment
Enterprise Architect	All	Accountable	
Management Lead	Business Capabilities, Applications, Initiatives, Objectives	Accountable	
Application (Technical) Owner	Applications, ITCs, Interfaces, Data Objects	Responsible	Ownership about whole App stack for all technical attributes
Business Owner	Applications	Responsible	Ownership about App for all business-related attributes
Data Architect	Data Objects, Interfaces	Responsible	Separated Ownership about Data and Integrations if company has specific roles for Data Architecture
Business/Domain Architect	Business Capabilities	Responsible	
Project Manager	Initiatives	Responsible	

Collaboration: Best Practices in leveraging LeanIX features for collaboration

Feature	Purpose	Help guidance: How-To
Meta Model Configuration	Make Fact Sheets simpler and clearer by hiding attribute fields you are currently not using – less “noise” and less confusion for users	Docs on Meta Model Configuration
Mandatory Fields	Define Mandatory Fields to showcase most important fields. They will appear as a checklist on the right-hand side panel for users	Docs on Mandatory Fields Activate Draft Mode of Quality Seal
Quality Seal	Configure your Quality Seal to break after a certain time (e.g. 3 or 6 months) to trigger data check	Docs on Quality Seal
Notifications	Set up notifications for events of data maintenance, e.g. Quality Seal break notifies Responsible owner	Docs on Notifications
Automations & To-Dos	Leverage automations for To-Do creation or triggering action items (Surveys) when Quality Seal breaks; Can also be used to calculate attribute fields such as TIME	Docs on Automations Best Practice

Workspace personalization: Best practices on leveraging LeanIX features for customization

Feature	Purpose	Help guidance: How-To
Dashboard	Customized 'Welcome' dashboard with personalized widgets for first timers to find relevant info easily	Docs on Custom Dashboards
Collections	Building customized collections for reports and diagrams allows you to cluster your reports by use case or user group. (e.g., project manager could access a collection of reports related to their projects).	Docs on Collections
Branding	Customize your workspace with color, changing the logo	Docs on Branding

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How to enable your colleagues on LeanIX

Why

It is important to ensure that invited colleagues are enabled to use LeanIX. Most users of LeanIX will not be knowledgeable about the new tool and may not be as deeply involved with LeanIX as the core EA team. The roll-out therefore requires quick hands-on training to grasp the idea and value of LeanIX.

What

Introduce, train and enable users on first basic use of LeanIX

- Training materials for different sessions / content
- Short videos for self-serve to get hands-on guidance on key activities

How

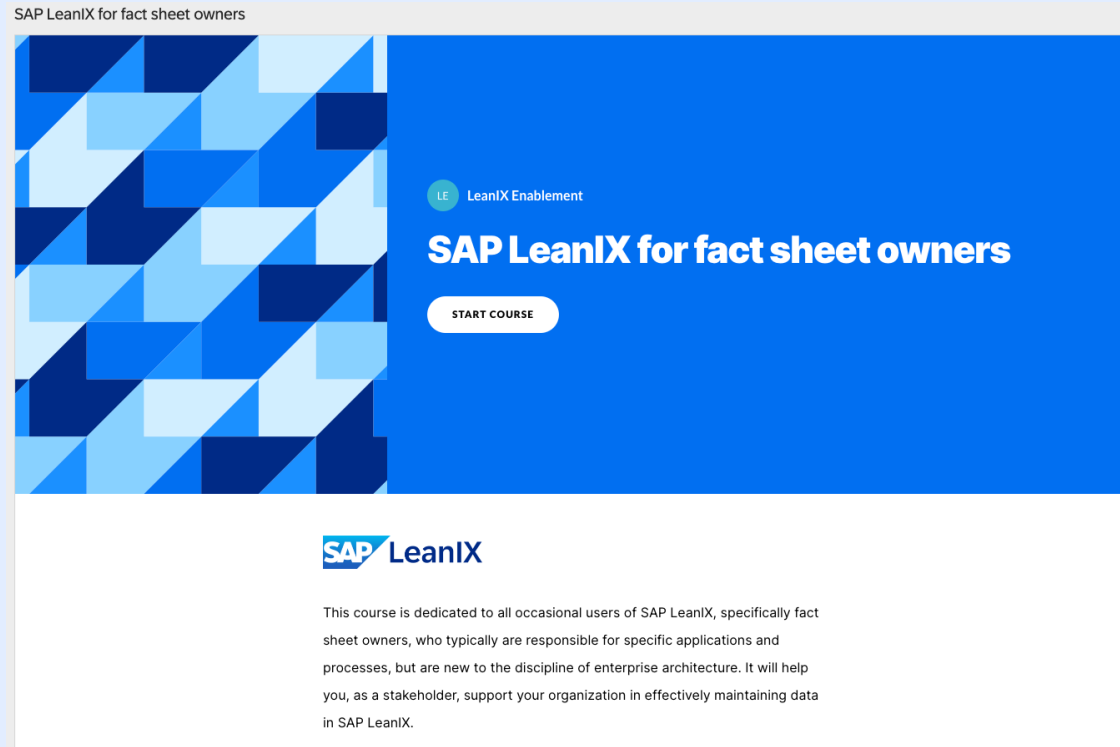
- Give training sessions to guide on LeanIX foundations, key features and activities based on our materials which you can adapt to your organization
- Share the How-To videos for quick access to all users

Ensure stakeholder-specific trainings

Relevance of topic	In focus		
	Admin	Member	Viewer
Strategy, Goals & Use Cases	●	●	◐
LeanIX Walkthrough	●	●	◑
Administration	●		
Data Model	●	●	◐
Fact Sheets	●	●	◑
Data Governance	●	●	
Reports	●	●	●
Collaboration	●	●	
Resources	●	●	◑

- Keep in mind: not every user has the same needs to understand in-depth level of LeanIX
- Ensure that each training / enablement session is adjusted to your audience
- This overview gives a likely indication of which LeanIX sections are relevant for whom
- Training could be a requirement for users to complete before access to LeanIX is allowed

LeanIX Academy Course: self-serve course for fact sheet owners



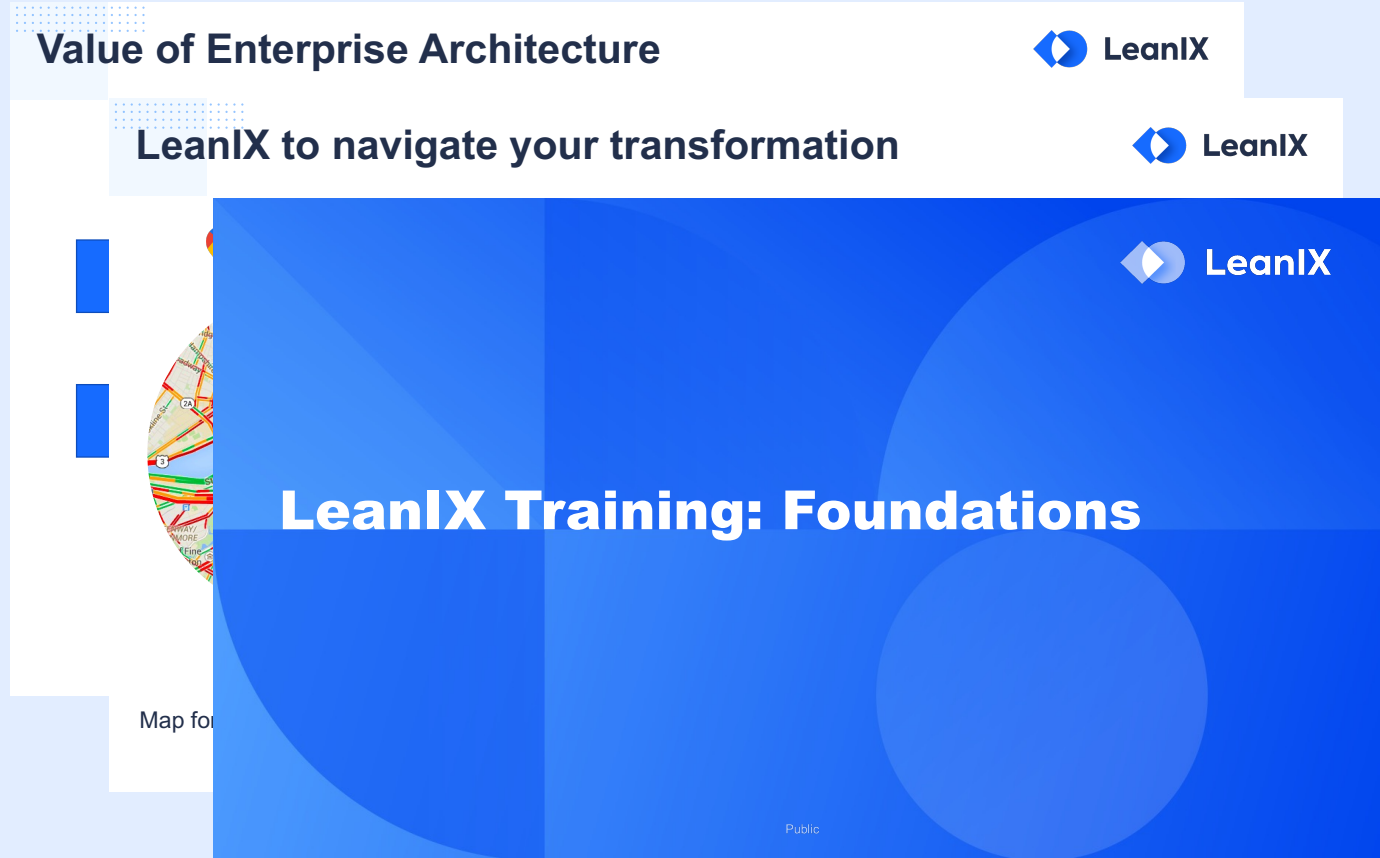
General overview of

- What is LeanIX?
- Why LeanIX?
- What is expected from you?

Includes quiz questions

Training Course [link](#)

Template Training Session #1: First introduction of LeanIX and focus on What, Why and How



- First introduction and announcement of LeanIX to Fact Sheet Owners
- What is LeanIX?
- Why LeanIX?
- What is expected from you?

Live Training PPTX template in attachment sections

Template Training Session #2: Continuous Use and focus on how to use for daily work



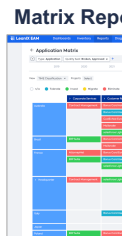
Different types of reports for analyses



Landscape Reports

Portfolio Reports

Completing a Survey Response Form



LeanIX Training: Continuous Use



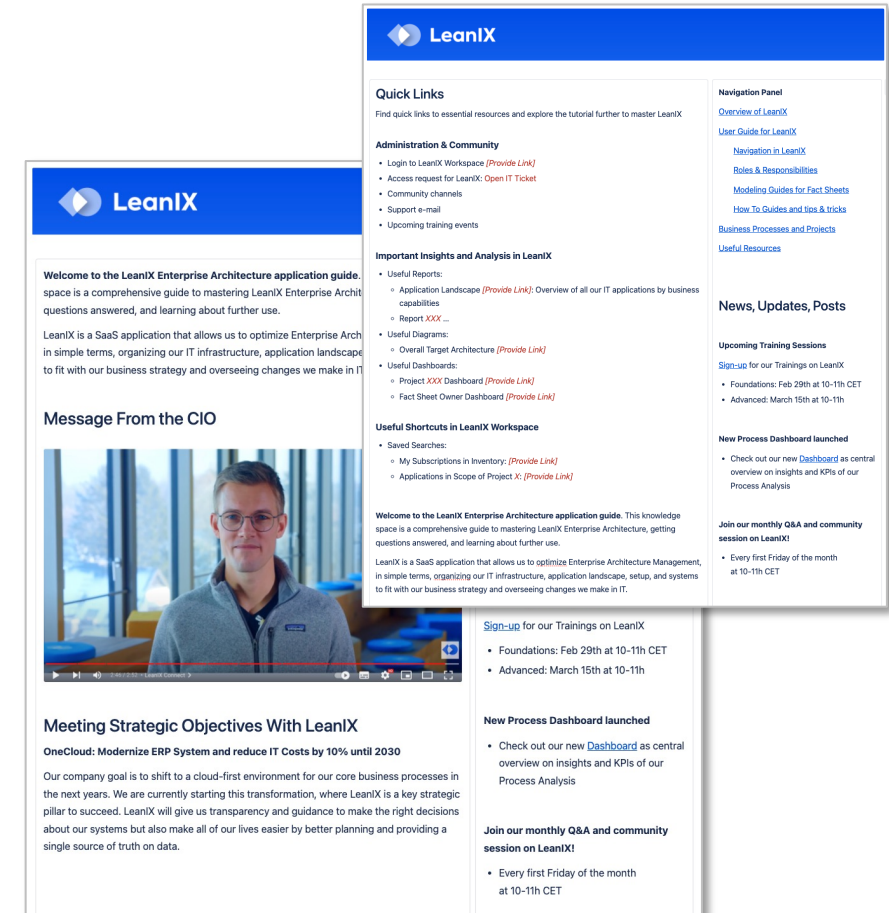
- Second training session to deep dive further into LeanIX features and completing first data enrichment/validation
- Recap LeanIX basics
- What is expected from you?
First completed survey
- How you can use LeanIX for your work? (i.e. explore relations, find information, modelling and visualizations with diagrams)

Live Training PPTX template in attachment sections

Template: Internal documentation to build knowledge library / wiki on LeanIX

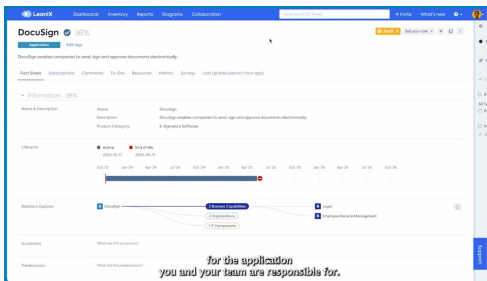
- It is best practice to create an internal documentation in **your file sharing system** with all relevant materials, information and explanations on LeanIX as self-serve portal / wiki to your internal users
- In order to kickstart your documentation and help you, we have created a **Confluence template**, which you can import, copy and adjust to system (e.g. Sharepoint)
 - File types: XML and HTML
- Please make sure to **review the structure and terminology to adjust to your company terms** – this template is supposed to serve you with a basic structure and not replace your own documentation

Confluence template in attachment sections

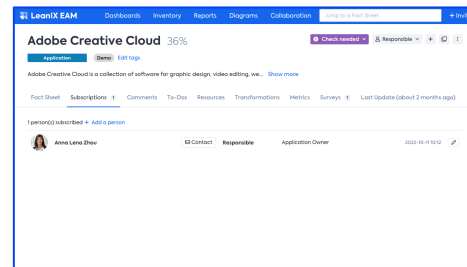


How-To tutorials: Library of short videos and Tips & Tricks quick guides

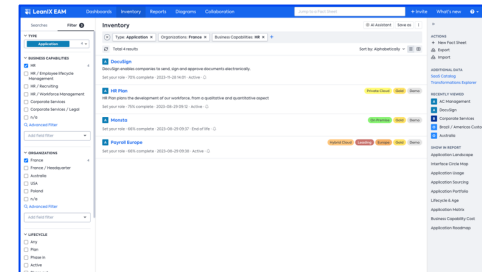
How to fill an Application Fact Sheet



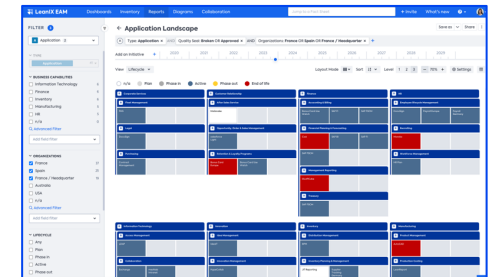
How to look up application data



How to filter and search your inventory

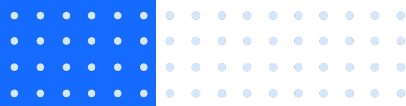


How to get insights from Reports



How-To Tutorial Videos available in attachment section

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How to reinforce LeanIX adoption in the organization

Why

Once users have understood LeanIX foundations and had first experiences in the tool, it is important to ensure continuous use of LeanIX to keep data quality high. Long-term self-serve material to share knowledge and document LeanIX practices should help and enable users to continue using LeanIX for their daily work

What

Deepen and reinforce knowledge and use of LeanIX for stakeholders

- Dashboard
- Confluence Documentation Template: central repository with detailed user guide and potential LeanIX Tips and Tricks
- Docs & Academy Course for non-EA users: LeanIX Academy for deeper learning
- Internal Community Channels, Events and Groups

How

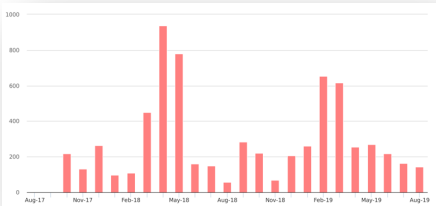
- **Adapt templates of playbook and internal documentation** to your organizations terminologies, context and objectives and make them available in your internal wikis / documentation repositories
- **Create internal forums for exchange** via community chats, events or office hours to ensure peer-to-peer exchange rather than only the core team providing info

Dashboards to enhance LeanIX data quality

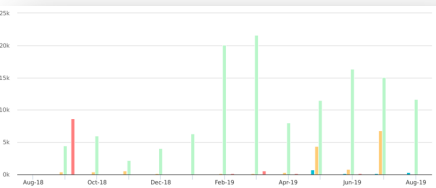
Dashboards & Monitoring

- **Monitor usage and maintenance** of LeanIX data through PowerBI Dashboards to track performance of Fact Sheet Views, Updates & Report Views
- **Create transparency and comparison across BUs** to motivate departments to outperform each other

Fact Sheets Completion



Fact Sheet Updates



Leaderboard

BU	# of Fact Sheets	% of Completion
HR	23	98%
Finance	31	96%
IT	12	94%
Manufacturing	24	93%
QM	10	89%
Sales	15	83%
Marketing	19	82%
R&D	25	73%

Call to action if drop below 95%

Gratification

- **Feedback and Appreciation** to efforts of data contribution is perceived as reward to contributors
- Best practice customers have shared that many users like to be involved and once completed a task should also be kept in the loop on results

Dashboards & Gamification to enhance LeanIX usage

Gamification

- **Enhance engagement** through gamification initiatives
- **Always set a suitable time-frame** (ideally short enough) for the challenges
- **Find senior sponsorship** to advocate for challenges
- **Ensure good communication** of challenge and results

Examples

- **Data Collection:** Competition who completes 100% of data completion assignments first
- **Surveys:** Gain points per surveys filled out with quarterly rewards
- **Quality Seal:** X weeks of time to check Quality Seal States and set to 100% of applications to “Approved” (vs. Draft, Check needed, Rejected)
- **Use case / project based:** Kill an App: nominate candidates for rationalization


Reckitt enterprise wide challenge on Workplace

Reducing the complexity of our Application Portfolio – Kill an App!


2 weeks challenge

46 Hunters **239** votes

162 applications nominated for “killing”



KILL an APP

Coming soon on your  **LeanIX** Screen!

The image shows a promotional poster for the 'Kill an App' challenge. It features a woman in a yellow jumpsuit holding a sword, standing against a yellow background. The text 'KILL an APP' is prominently displayed in large, bold letters. Above the poster, the challenge details are listed: 'Reckitt enterprise wide challenge on Workplace', 'Reducing the complexity of our Application Portfolio – Kill an App!', '2 weeks challenge', '46 Hunters', '239 votes', and '162 applications nominated for “killing”'. Below the poster, the text 'Coming soon on your LeanIX Screen!' is visible, with the LeanIX logo.

Gamification Example: Star Wars

- **Customer Example Doctolib:** Doctolib gamified the different stages of mastery for an application owner along star wars characters
- <https://app.leanix-connect.com/event/leanix-connect-summit-europe-2023/planning/UGxhbm5pbmdfMTE5ODI3Mw==>
- Gamification Deep Dive at timestamp 14:17min



EA Governance: Enterprise Architecture Board and business processes with EA

- Long-term success and impact of Enterprise Architecture will be its **integration and influence into key business processes and decision making**
- We recommend every LeanIX user to integrate relevant data points and insights to support running business, which will help to **emphasize the value of EA and LeanIX** as well as automatically **encourage high data quality and maintenance**
- Such processes can be for example procurement / new product evaluation, where new technologies will only be evaluated or introduced if they are properly documented in a LeanIX Fact Sheet

Giving EA a “seat at the table” ...

Strategy / planning

- IT strategy / alignment – Contribute to IT strategy and alignment to business strategy
- Strategic planning / budgeting – Determine how investment levels are set, allocated to groups/initiatives, and how they impact business capabilities
- Merger / acquisition planning – Assess Enterprise impact across people, processes, and technology

Product / program

- Product strategy / roadmapping – Share technology innovations and collaborate on roadmaps / strategy
- New program envisioning – Advise on scope, intent, approach, and value during envisioning and initiating new products / programs / projects

Innovation

- New technology introduction – Assess request to ensure strategic fit, drive reuse, and minimize business-led IT (sometimes in collaboration with IT procurement)
- Emerging technology / innovation – Identify, evaluate, and educate on innovative technologies and their efficient usage in Enterprise

... and adding value beyond the ARB

Risk / audit / regulatory / security

- Risk / audit / regulatory readiness – Ensure Enterprise is properly managing its risk and regulatory posture
- Operational readiness – Ensure Enterprise is properly managing its BCP and DR posture as well coverage of runbooks and observability tools
- Security Readiness – Ensure Enterprise is properly managing its security posture as well as coverage of SSO, MFA, and IAM initiatives

Technology operations

- Impact Assessment – Ensure completeness of revenue / customer impact and remediation plan during an outage or security event
- Root Cause Analysis – Consult on critical RCAs to ensure analysis delivers true insights and that proposed solutions remediate that root cause

Architecture Change

- Architecture Review Board – Ensure all proposed projects follow Enterprise standards, align with Architecture vision / principles and strategic goals, are well architected
- Tech modernization – Drive application modernization and minimize technical debt

LeanIX Academy course for non-EA users (Q2/Q3) **LeanIX**

LeanIX Academy for Application Owners: Self-serve training for non-EA users to familiarize and revise basics in LeanIX

Playbook & Academy Course TBC in Q2/Q3 2024

1. **Introduction to LeanIX Roll-out and Adoption**
2. **Awareness & Desire: Plan and prepare LeanIX roll-out in your org**
 1. EA Governance and stakeholder groups
 2. Roadmap and training plan for successful roll-out and adoption
 3. Communication and Announcement Mail Templates
3. **Knowledge & Ability: Enable non-EA users on LeanIX foundations**
 1. Training session Templates
 2. Sharepoint/Confluence Documentation Template
 3. How-To Video Tutorials
4. **Reinforcement: Enable non-EA users for continuous LeanIX use**
 1. Workspace personalization
 2. Dashboard & Gamification
 3. Advanced EA Governance
 4. *Playbook & Academy Course for non-EA users (in Q2/Q3 2024)*
5. **Other useful LeanIX Enablement Resources**



Other useful LeanIX Enablement resources



LeanIX Docs - Product
Documentation



LeanIX Academy



Support



Peer Exchange Events



LeanIX Community



Webinars & Customer stories



LeanIX Website



YouTube Channel



Blog

Special call-outs:

Orsted Customer Story on
Roll-out & Adoption:

<https://www.leanix.net/en/customers/success-stories/orsted>

LeanIX Docs for App &
Business Owners:

<https://docs-eam.leanix.net/docs/leanix-for-application-and-business-owners>

Feedback, comments or contributions of best practices are welcome in this form