

Trillium Consulting

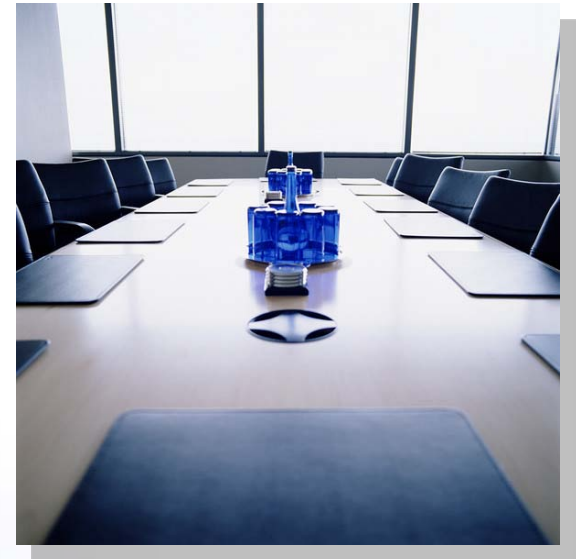
7 Practical Best Practices to Successful Data Governance

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Jim Orr, Global Director Enterprise Data Strategy,
Trillium Consulting



- 1) Test the water
- 2) Sort it out – types
- 3) Sort it out – scope
- 4) It's not about the data
- 5) Demonstrate the value
- 6) Sand castle or brick house?
- 7) Elementary decisions, enduring consequences

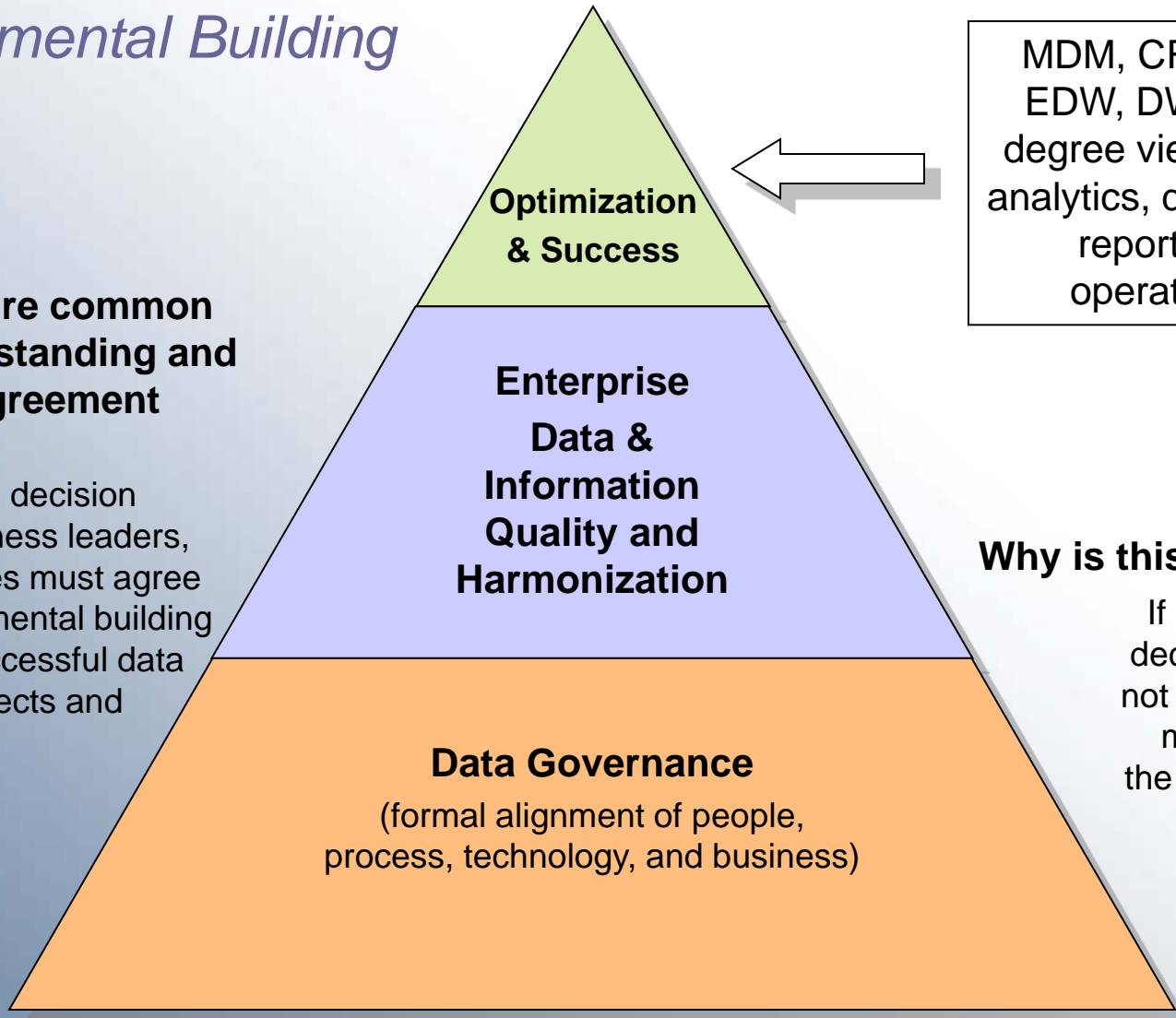


1) Test the Water

Fundamental Building Blocks

Secure common understanding and agreement

Stakeholders, decision makers, business leaders, and executives must agree on the fundamental building blocks for successful data intensive projects and programs.



MDM, CRM, CDI, BI, EDW, DW, ERP, 360 degree view, advanced analytics, data migration, reporting, data operations, etc.

Why is this so important?

If stakeholders and decision makers are not committed to this model then what's the point? If they are committed then it establishes the foundation for ongoing support.

2) Sort it Out – Types of Data Governance

3 Forms of Data Governance

- **Administrative**

- Direction & prioritization
- Scope
- Structure
- Organizational alignment
- Roles & responsibilities
- Accountability
- Authority
- Policy
- Issue resolution
- Funding

- **Technical**

- Data modeling
- Metadata management
- Data quality
- Data lineage
- Workflow management

- **Business**

- Data standards
- Business rules
- Business process
- Stewardship

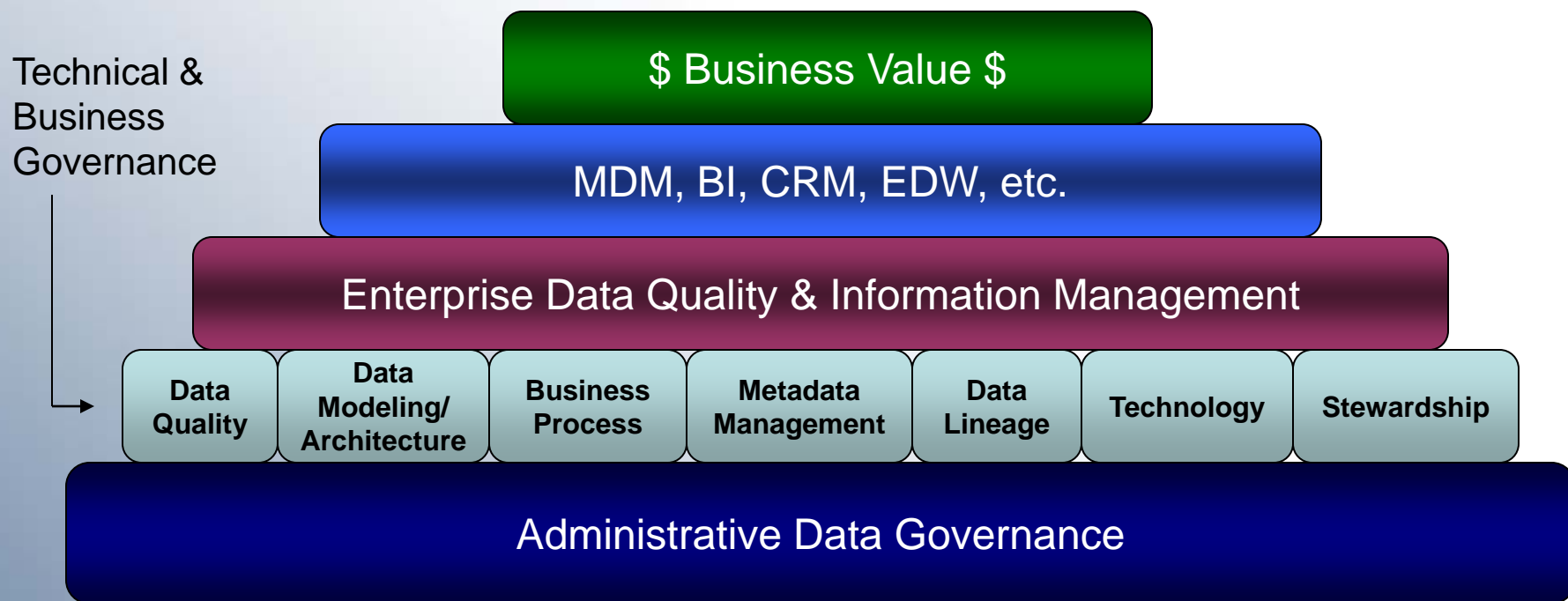


Why is this so important?

- Clears up the confusion among stakeholders, business leaders, executives, and other associates as to what data governance is
- Begins to delineate roles and responsibilities between the business, IT, as well as the oversight and interdependencies of these functions
- Helps identify and align required skills, resources, and support groups
- Helps focus and prioritize

2) Sort it Out – Types of Data Governance

3 Forms of Data Governance



Administrative data governance is the framework that enables technical & business data governance. In turn it drives business value by enabling enterprise data quality and information management for data intensive projects

3) Sort it Out – Data Governance Scope

Data Management Function

- Data Quality
- Architecture
- Metadata Management
- Data Standards
- Data Modeling
- Business Process
- Business Rules
- Reporting & Analytics
- Security
- Technology
- Data Integration
- Data Lineage
- Risk & Compliance
- Stewardship
- Monitoring & Metrics

Scope should be addressed at 3 basic levels with further details built out for each

Data & Information

- Structured Data
- Unstructured Data
- Consumer
- Commercial
- Product
- Financial
- Policy
- Contracts/Legal

Build a plan that reflects how the program will, should, or should not scale across each domain

Project

- MDM
- CRM/CDI
- BI
- EDW
- ERP
- 360° View
- Merger & Acquisition
- Customer Definition
- Technology Selection
- Data Enrichment
- Business Partner Integration
- Personal Information Management
- Business Process Improvement
- Physical Asset Management

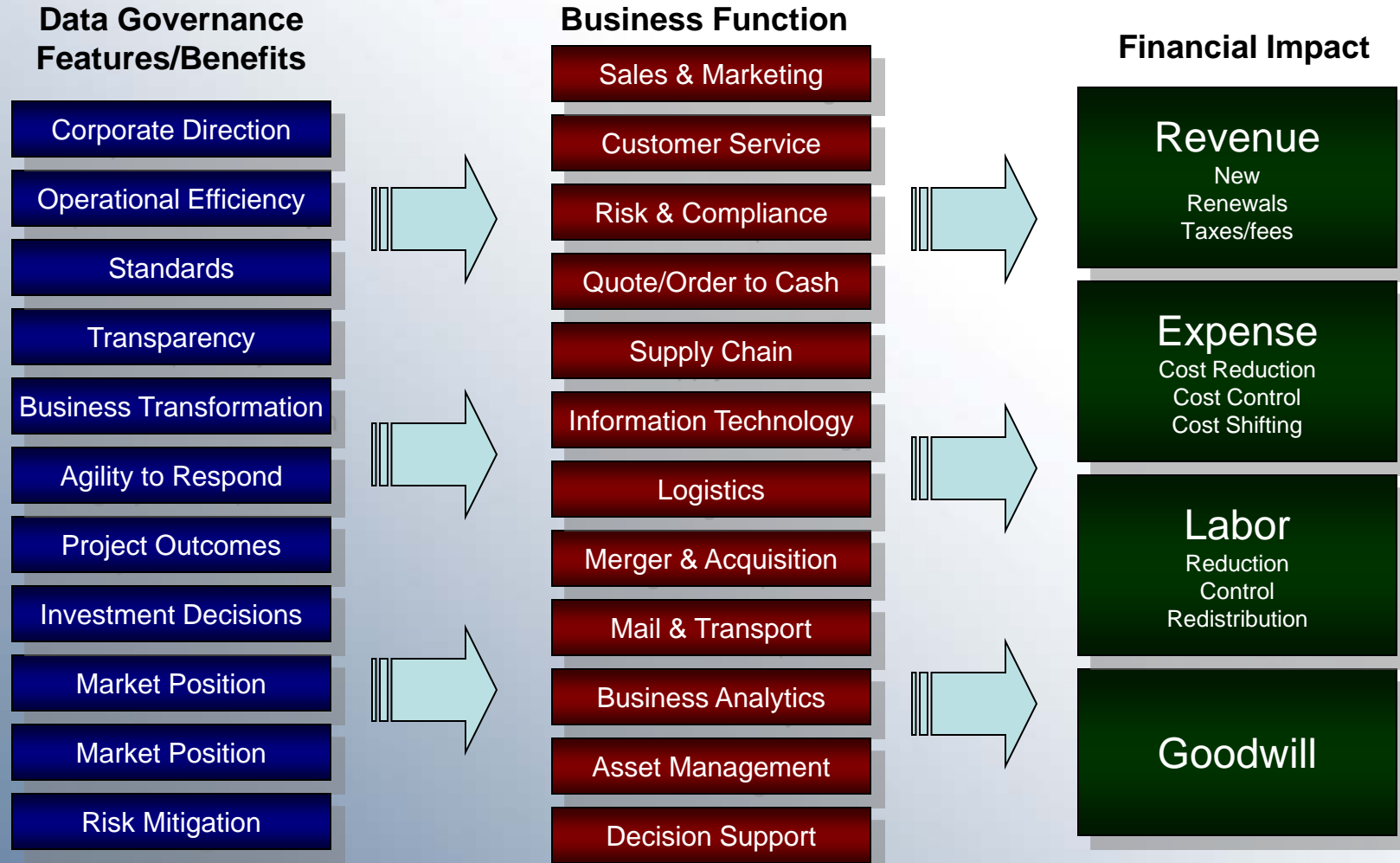
3) Sort it Out – Data Governance Scope

Why is this so important?

- Provides a micro and macro view
- Puts DG in perspective for all audiences
- Shows how it can/should scale projects over time
- Graphical roadmap people relate to
- Reflects opportunities
- Helps identify resources requirements

4) Data Governance

Its not about the data



5) Data Governance – Demonstrate the Value

Tell a compelling story – its not just about ROI

- **Data governance 101**
 - Educate decision makers & set expectations
- **Leverage industry insight**
 - Surveys, reports, case studies, trends
 - Analyst, professional organizations
- **Leverage existing project business case**
 - MDM, BI, CRM, CDI, EDW, DW
- **Define tangible & intangible features/benefits**
 - Revenue, cost, risk
 - Direction, transparency, efficiency, agility, risk mitigation, project outcomes
- **Go to the source** ←
 - Understand where and how data is used by the business
- **Reflect project and program features & benefits**
 - Don't get stuck on the project - program value more compelling than a single project

Did You Know?

Most organizations do not really understand how data is consumed within the company which limits the effectiveness of their business case.

5) Data Governance – Demonstrate the Value (cont.)

Tell a compelling story – its not just about ROI

- **Give an example**
 - Present an actual worst case scenario that decision makers can relate to
- **Company direction**
 - Tie business case to company mission, goals, and objectives
- **Competition**
 - Show what your competition is doing
- **Ask the question**
 - What if we do nothing?
- **Create a 2-5 year high-level plan**
- **Develop conceptual framework**
 - Show how to the program could become operational
- **Solid presentation**
 - Presentation is more important than the document
- **Get 3rd party assistance**



6) Data Governance – Sand Castle or Brick House

Structural Best Practices

Brick House (optimal)	Grass Hut (In between)	Sand Castle (grass root)
Funded	?	Not funded or poorly funded
Formal office in the company organization chart	?	Loosely formed committees/task forces
VP/Director led	?	Manager or staff position led
Business focused & business led	?	Technical focus
Accountability & authority	?	Just get along
Council guidance format		Loosely formed council, if that
Center of Excellence/ Competency Center	?	SME's where possible
Centralized/coordinated stewardship	?	Fragmented stewardship

7) Elementary Decisions, Enduring Consequences

Get it right from the beginning

- **What to call it?**
 - Data governance, information asset management, etc.
- **Expectations**
 - Are they clearly communicated & aligned?
- **How will you define/measure success?**
 - Data outcomes?
 - Business process improvement?
 - Business outcomes?
- **Involve both Business & IT**
 - We all know this, why don't we all do it?
- **Meeting management**
 - Poor meeting management is the quickest way to kill months of preparation and hard work



Data Governance Solutions

Approach

- Focus on the foundation
- Client enabling
- Practical vs. academic
- Modular/flexible design
- Specialization vs. generalization
- Strategic partner vs. body shop



Benefits

- Low cost of entry and low total cost of ownership
- Accelerated rate on return of investment
- Improve success factor
- 3rd party change agent

Data Governance Solutions

Phase	Solution	
Discovery & Awareness	<ul style="list-style-type: none"> <input type="checkbox"/> Data Governance Maturity Assessment <input type="checkbox"/> Business Value Assessment <input type="checkbox"/> Risk Assessment <input type="checkbox"/> Data Quality Audit <input type="checkbox"/> Data Governance Workshop (for stakeholders) <input type="checkbox"/> Executive/Business Leader Support Services 	<input type="checkbox"/> Mentor & Advocacy Services
Strategy, Planning, & Program Development	<ul style="list-style-type: none"> <input type="checkbox"/> Program Development <ul style="list-style-type: none"> •Strategy & planning •Structure •Roles & responsibilities •Stewardship •Communication plans •Charters 	
Implementation	<ul style="list-style-type: none"> <input type="checkbox"/> Program Management Services <input type="checkbox"/> Organization/Functional Alignment <input type="checkbox"/> Meeting Management <input type="checkbox"/> Data Governance Workshop (for participants) 	

Questions?

Ask now or contact:

Jim Orr – Global Director, Enterprise Data Strategy, Trillium Consulting

Office: (719) 481-0565

Mobile: (719) 534-3116

E-Mail: james_orr@trilliumsoftware.com

Thank You!