



Start Up, or Reset, Information Management In A Large Organization

April 24, 2018

EIM Value Proposition

Data → Information → Analytics → Insight
→ Outcome

Trusted Data leads to Positive Outcomes

This Session

- Think of this session as a recipe to 'Start Up or Reset'
 - You're the chef, you can take what you want from the recipe
- Lots of slides, details & content
- PDF available after the conference
- Contact details are at the end of the presentation

© 2018 All rights reserved

Before You Start

Choose a Framework for Data & Information Management

DAMA DM-BOK

Well documented

Certification Available

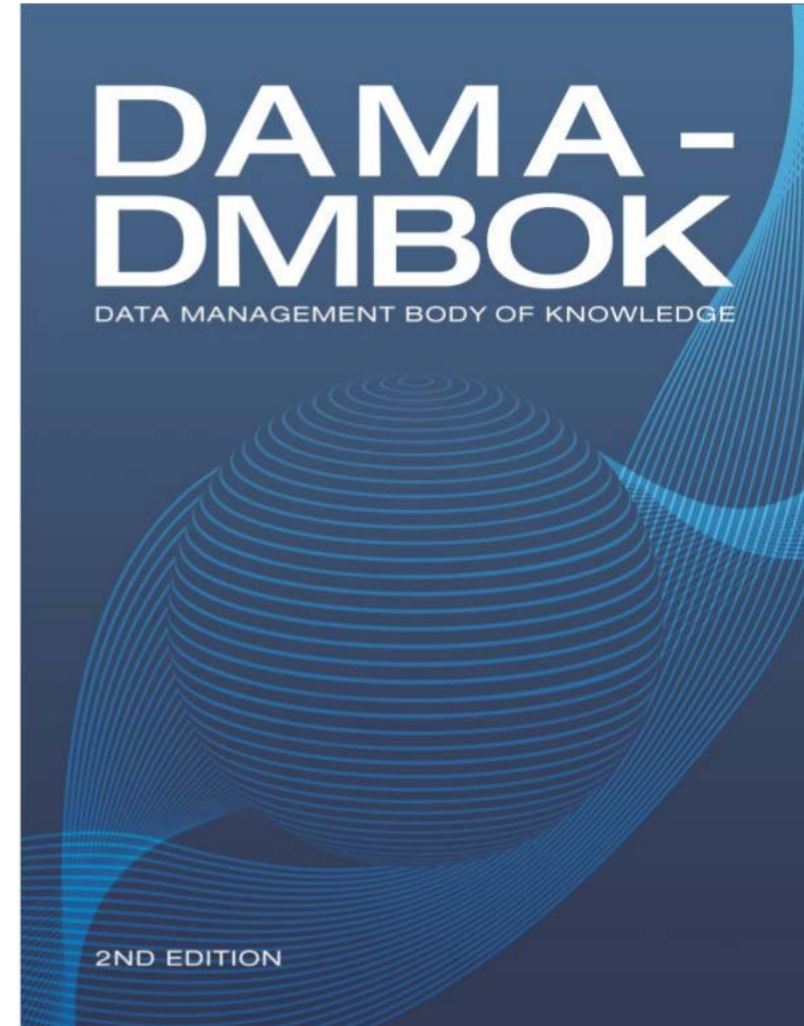
Establishes Best Practice

Establishes Consistent Terminology

Written & Reviewed by thinkers & practitioners

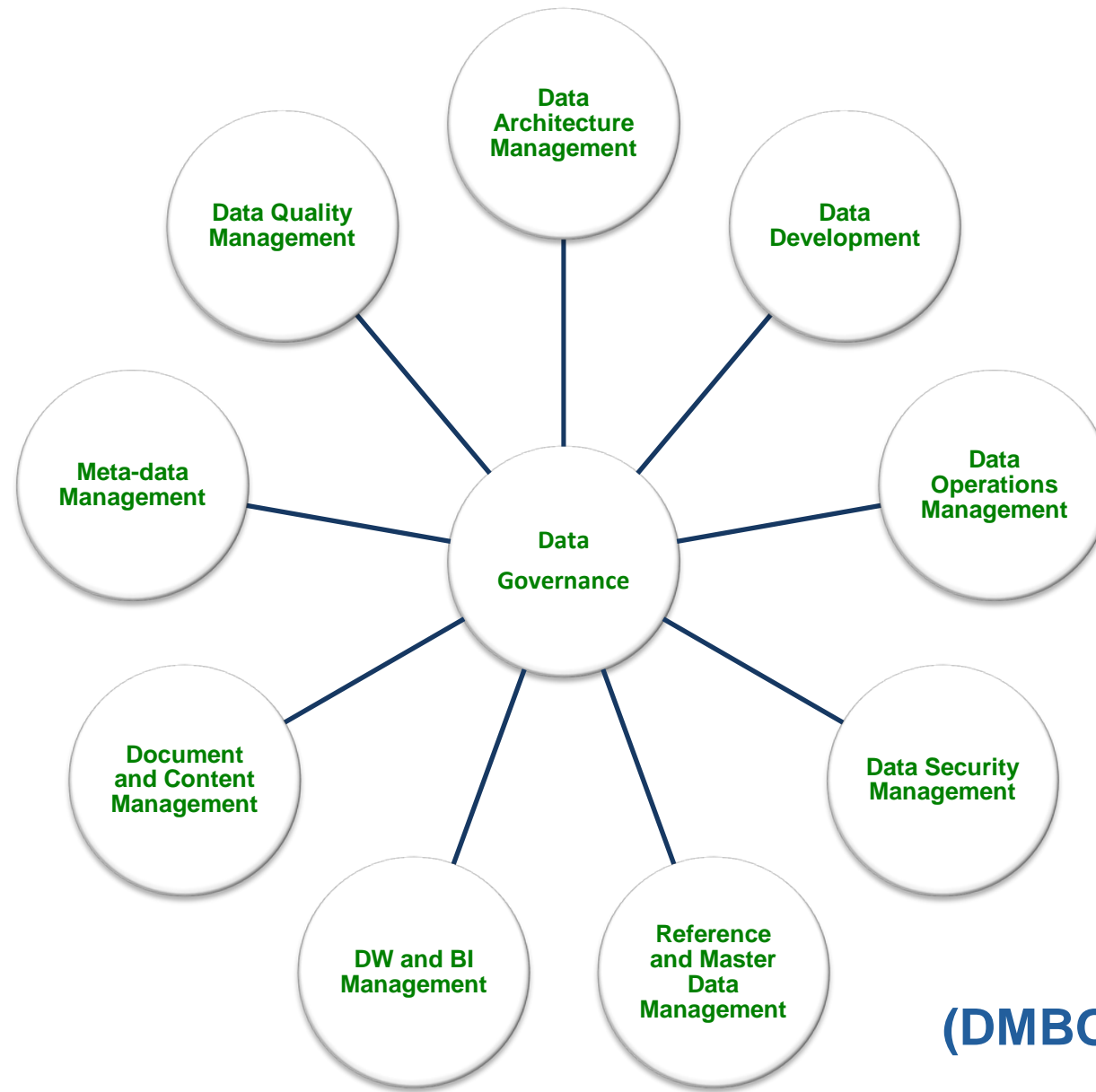
(26 Primary Contributors, 220+ Reviewers)

Prevents “*We make it up as we go along*”



DAMA DM-BOK

Knowledge Areas



(DMBOK V1 Knowledge Areas)

Before You Start

Why? (1/3)

Because you want to help your business partners:

1. *Grow from Excel to BI software?*
2. *Self-service BI?*
3. *Reduce time to delivery for new reports?*
4. *Integrate reporting from all business applications and business units?
(Enterprise DW/BI)*

© 2018 All rights reserved

Before You Start

Why? (2/3)

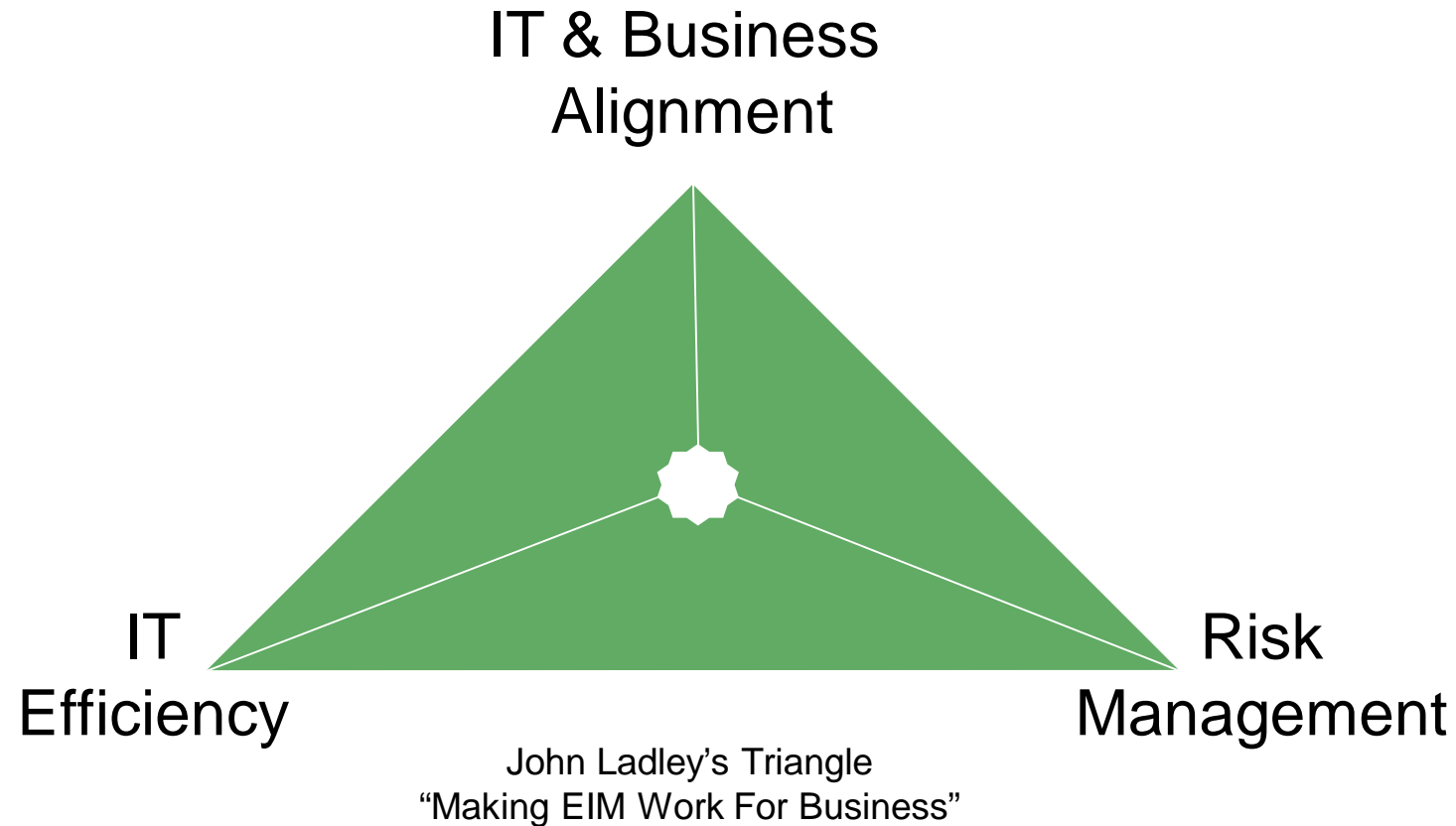
5. *Add data mining and predictive analytics?*
6. *Understand business terms across the organization?*
7. *Cost – Improve data quality to reduce waste, rework and cost?*
8. *Trust – Accurate data in applications & reports?*
9. *Trust – Consistent data across applications & reports?*

© 2018 All rights reserved

Before You Start

Why? (3/3)

Because CEO/CIO want to improve ...



© 2018 All rights reserved

Key Takeaway From This Session...

Six Steps

Start Up, or Reset, Information Management

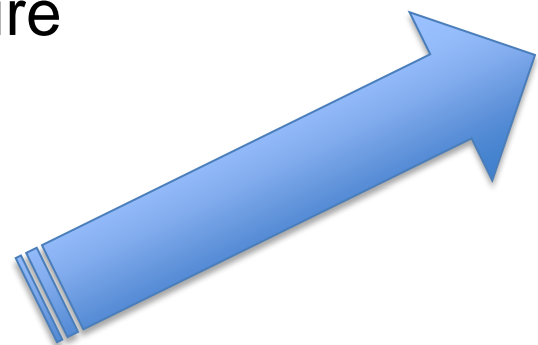
Count them on one hand if you are Polydactyly...



© 2018 All rights reserved

Start up or Reset

Six Steps Using DAMA DM-BOK

1. Where Are You Now?
➔ Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas
 2. Develop A Road Map
 3. *Foundation Pillar*: Deliver Data Governance
 4. *Foundation Pillar*: Deliver Data Architecture
 5. *Foundation Pillar*: Deliver Metadata
 6. Core EIM Pillars Support Improvement
- 
7. **Closing Takeaway**

© 2018 All rights reserved

Start up or Reset

Six Steps Using DAMA DM-BOK

1. Where Are You Now?
➔ Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas
2. Develop A Road Map
3. *Foundation Pillar*: Deliver Data Governance
4. *Foundation Pillar*: Deliver Data Architecture
5. *Foundation Pillar*: Deliver Metadata
6. Core EIM Pillars Support Improvement

© 2018 All rights reserved

#1. Gap/Capability Maturity Assessment

Adopt & Adapt SEI CMU CMM

Software Engineering Institute
Carnegie Mellon University
Capability Maturity Model

0 - Non-Existent/Not Defined
Unaware

#1. Gap/Capability Maturity Assessment

Adopt & Adapt SEI CMU CMM

Software Engineering Institute
Carnegie Mellon University
Capability Maturity Model

5 – Optimizing
Continuous Improvement

4 – Managed
Effective and Efficient

3 – Defined
Awareness and Management Begins

2 – Repeatable
Very Busy

1 - Initial/Ad Hoc
Heroic Efforts

0 - Non-Existent/Not Defined
Unaware

© 2018 All rights reserved

#1. Gap/Capability Maturity Assessment

Sample: Data Quality Management – Scoring

0	1	2	3	4	5
Non-Existent/ Not Defined/ Unaware	Initiating	Developing	Implementing	Optimizing	Optimizing Continuous Improvement
<p>There may, or may not be recognition that a problem exists with data quality, but no action is underway.</p>	<p>Some, but not all, lines of business have started to correct data quality issues. Extracts, applications, and analyses are analyzed using MS Excel.</p> <p>Data quality is identified as a difficult and significant process. The problem is being clarified and the cause is being investigated.</p>	<p>There may, or may not be recognition that a problem exists with data quality, but no action is underway.</p>	<p>Data quality is continually monitored, measured and profiled against historical trends.</p> <p>The data quality repository is integrated with the meta-data repository.</p> <p>Data quality is on the agenda for reports to the CEO, COO and CIO.</p>	<p>Data quality is continually monitored, measured and profiled against historical trends.</p> <p>The data quality repository is integrated with the meta-data repository.</p> <p>Data quality is on the agenda for reports to the CEO, COO and CIO.</p>	<p>Data quality is continually monitored, measured and profiled against historical trends.</p> <p>The data quality repository is integrated with the meta-data repository.</p> <p>Data quality is on the agenda for reports to the CEO, COO and CIO.</p>

#1. Gap/Capability Maturity Assessment

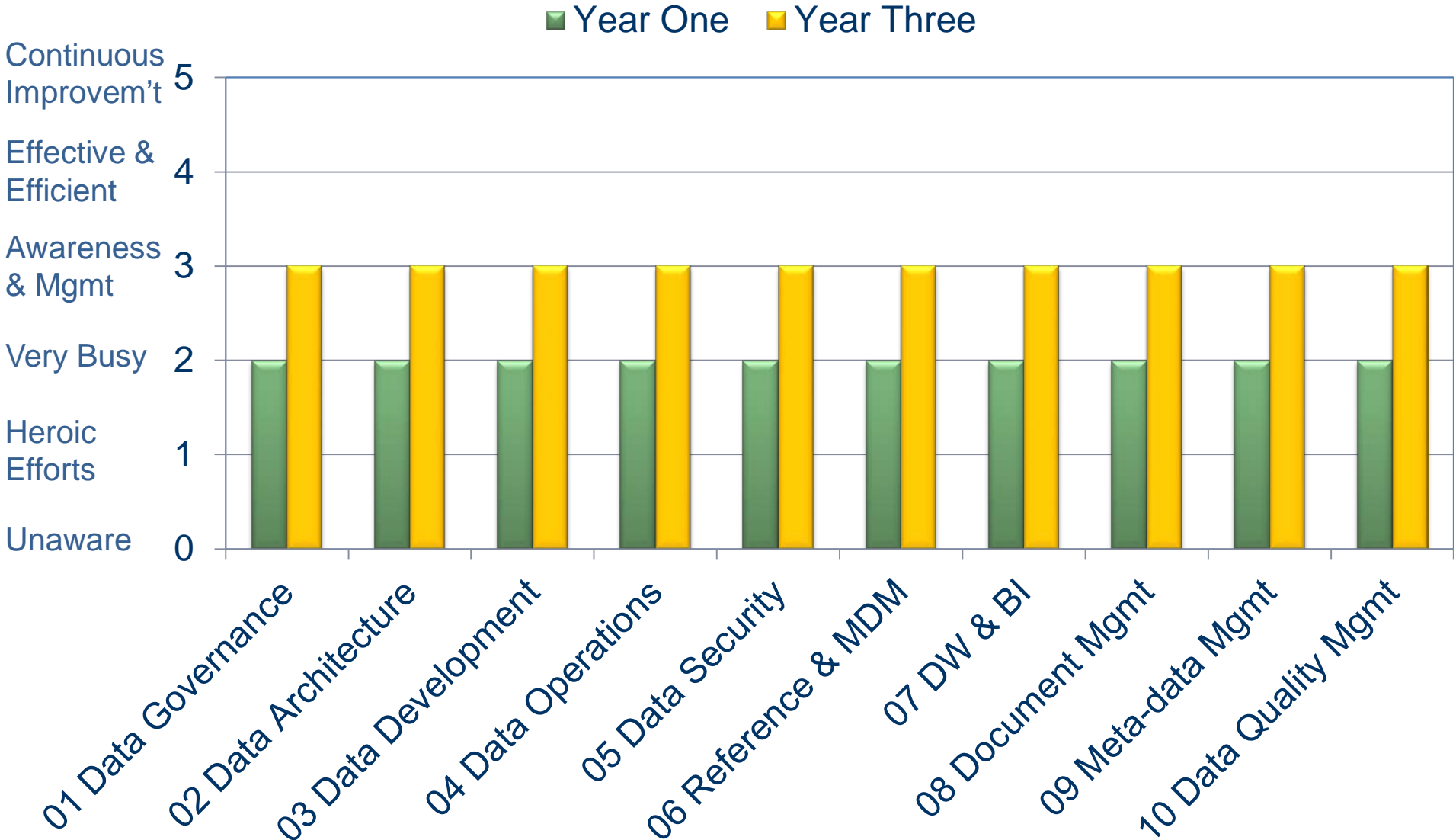
Sample: Data Quality Management – Scoring

0 Non-Existent/ Not Defined Unaware	1 Initial/Ad-hoc Heroic	2 Repeatable Very Busy	3 Defined Awareness & Mgmt	4 Managed Effective & Efficient	5 Optimizing Continuous Improvement
<p>There may, or may not be recognition that a problem exists with data quality, but no action is underway.</p>	<p>Some, but not all lines of business have staff that work to correct data quality problems.</p> <p>Extracts from application systems are analyzed using MS Excel.</p> <p>Data quality problem identification is difficult and a significant manual process.</p> <p>The problems are being cleansed, but the causes are not being corrected.</p>	<p>Most lines of business have staff that monitor data quality using extracts and MS Excel.</p> <p>Based on analysis, some applications are modified to resolve data quality exposure points.</p>	<p>Dedicated data quality software has been installed.</p> <p>Some extracts have been created and are being measured and profiled.</p> <p>A data quality specialist is beginning to establish priorities with the business data stewards.</p> <p>The list of data quality change service requests is large, but is being addressed.</p>	<p>Automated monitoring has been implemented.</p> <p>A repository of historical data quality metrics exists.</p> <p>Predefined reports are sent to the business data stewards and their senior managers.</p> <p>The list of data quality change service requests is minimal, and represents non-mission critical data elements.</p>	<p>Data quality is continually monitored, measured and profiled against historical trends.</p> <p>The data quality repository is integrated with the meta-data repository.</p> <p>Data quality is on the agenda for reports to the CEO, COO and CIO.</p>

#1. Gap/Capability Maturity Assessment


Bar Chart, Compare Year over Year

Year Over Year Comparison – Sample




#1. Gap/Capability Maturity Assessment

Why is this important? (1/3)

Maturity Level		Typical Behaviours/Symptoms
Level 5 Optimizing <i>Continuous Improvement</i>		<p>How are things with your business partner?</p> <p>Symptoms & Diagnosis!</p>
Level 4 Managed <i>Effective and Efficient Management</i>		
Level 3 Defined <i>Awareness & Management Begins</i>		
Level 2 Repeatable <i>Very Busy</i>		
Level 1 Initial <i>Heroic Efforts</i>		
Level 0 Non-Existent, Not Defined <i>Unaware</i>		


#1. Gap/Capability Maturity Assessment

Why is this important? (1/3)

Maturity Level		Typical Behaviours/Symptoms			
Level 5 Optimizing <i>Continuous Improvement</i>		Progress Is Business As Usual	Open Market Skill Sets	Reduced Operational Risk	Fact Based Decisions
Level 4 Managed <i>Effective and Efficient Management</i>					
Level 3 Defined <i>Awareness & Management Begins</i>					
Level 2 Repeatable <i>Very Busy</i>		<i>Versus</i>			
Level 1 Initial <i>Heroic Efforts</i>		Heroic Activity Waste & Rework	Key Man Risk & Job Security	Increased Operational Risk	Intuition Based Decisions
Level 0 Non-Existent, Not Defined <i>Unaware</i>					


#1. Gap/Capability Maturity Assessment

Why is this important? (2/3)

Maturity Level		Typical Behaviours/Symptoms		
Level 5 Optimizing <i>Continuous Improvement</i>				
Level 4 Managed <i>Effective and Efficient Management</i>				
Level 3 Defined <i>Awareness & Management Begins</i>		<i>Versus</i>		
Level 2 Repeatable <i>Very Busy</i>		Manpower & Work Hard		
Level 1 Initial <i>Heroic Efforts</i>				
Level 0 Non-Existent, Not Defined <i>Unaware</i>				

#1. Gap/Capability Maturity Assessment

Why is this important? (2/3)

Maturity Level		Typical Behaviours/Symptoms		
Level 5 Optimizing <i>Continuous Improvement</i>		Brainpower	Proactive	KYC
Level 4 Managed <i>Effective and Efficient Management</i>		& Work Smart	& Planned	& KYP
Level 3 Defined <i>Awareness & Management Begins</i>		<i>Versus</i>		
Level 2 Repeatable <i>Very Busy</i>		Manpower	Reactive	The Unknown Customer
Level 1 Initial <i>Heroic Efforts</i>		&	&	&
Level 0 Non-Existent, Not Defined <i>Unaware</i>		Work Hard	Ad Hoc	Too Many Products

Start up or Reset

Six Steps Using DAMA DM-BOK

1. Where Are You Now?
→ Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas
2. Develop A Road Map
3. *Foundation Pillar*: Deliver Data Governance
4. *Foundation Pillar*: Deliver Data Architecture
5. *Foundation Pillar*: Deliver Metadata
6. Core EIM Pillars Support Improvement

© 2018 All rights reserved

#2. Develop A Road Map Based on the Maturity Assessment

Part One: Prioritize Three Foundation Pillars



#2. Develop A Road Map Based on the Maturity Assessment

Part Two: Develop a Road Map & Project Plans

DAMA Functional Area	Year 1 - Q2	Year 1 - Q3	Year 1 - Q4	Year 2 - Q1	Year 2 - Q2	Year 2 - Q3	Year 2 - Q4	Year 3 - Q1	Year 3 - Q2
01 Data Governance	Hire Data Governance Analyst								
02 Data Architecture Management	Hire Enterprise Data Architect								
03 Data Development									
04 Data Operations Management									
05 Data Security Management									
06 Reference and Master Data Mgmt									
07 DW/BI Management									
08 Document and Content Mgmt									
09 Meta-data Management	Hire Metadata Architect								
10 Data Quality Management									

Plan The Work ... Work The Plan

*** If you fail to plan ... then you plan to fail ***

#2. Develop A Road Map Based on the Maturity Assessment

Part Two: Develop a Road Map & Project Plans

DAMA Functional Area	Year 1 - Q2	Year 1 - Q3	Year 1 - Q4	Year 2 - Q1	Year 2 - Q2	Year 2 - Q3	Year 2 - Q4	Year 3 - Q1	Year 3 - Q2
01 Data Governance	Hire Data Governance Analyst	Develop organization structure	Customer Master	Customer Master	Product Master	Product Master	Location Master	Another Master	Another Master
02 Data Architecture Management	Hire Enterprise Data Architect	Software, Model Mgmt & Standards	Reverse Engineer	Subject Area 1 Customer	Subject Area 2 Location	Subject Area ###	Subject Area ###	Subject Area ###	Subject Area ###
03 Data Development			Hire Data Modellers	Support DW/BI	Support CRM	Support Operational Systems			
04 Data Operations Management				Review standards					
05 Data Security Management					Review standards				
06 Reference and Master Data Mgmt			Hire MDM Architect	Architect A Solution	Support DW/BI & CRM	Implement MDM	Implement Reference Table Mgmt		
07 DW/BI Management				Hire Predictive Analytics Specialist	Develop ETL & BI Standards	Develop predictive models			
08 Document and Content Mgmt						Hire ECM Specialist	Develop First Taxonomy	Integrate structured with unstructured	Develop Second Taxonomy
09 Meta-data Management	Hire Metadata Architect	Develop model	Build ETL bridges	Build ETL bridges and reports	Publish	Integrate with Applications	Harvest	Harvest	Harvest
10 Data Quality Management				Hire Data Quality Analyst	Support DW/BI & CRM	Support Predictive Analytics	Support all LOB		

Plan The Work ... Work The Plan

*** If you fail to plan ... then you plan to fail ***

Start up or Reset

Six Steps Using DAMA DM-BOK

1. Where Are You Now?
→ Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas
2. Develop A Road Map
3. Foundation Pillar: Deliver Data Governance
4. *Foundation Pillar*: Deliver Data Architecture
5. *Foundation Pillar*: Deliver Metadata
6. Core EIM Pillars Support Improvement

© 2018 All rights reserved

#3. Foundation Pillar: Data Governance

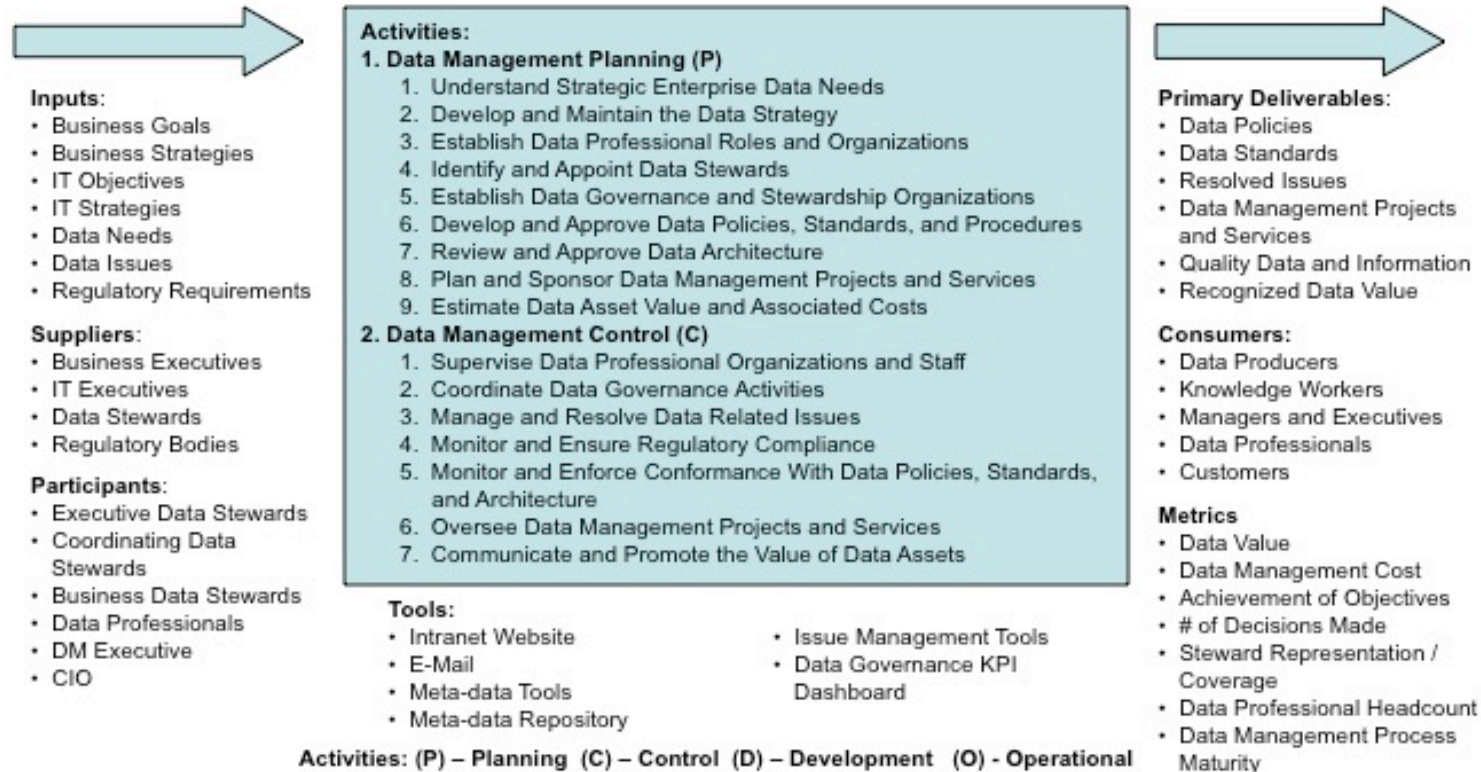
DMBOK1 Context Diagram

1. Data Governance

Definition: The exercise of authority and control (planning, monitoring, and enforcement) over the management of data assets.

Goals:

1. To define, approve, and communicate data strategies, policies, standards, architecture, procedures, and metrics.
2. To track and enforce regulatory compliance and conformance to data policies, standards, architecture, and procedures.
3. To sponsor, track, and oversee the delivery of data management projects and services.
4. To manage and resolve data related issues.
5. To understand and promote the value of data assets.



#3. Foundation Pillar: Data Governance

Adopt, Adapt ... (1/2)

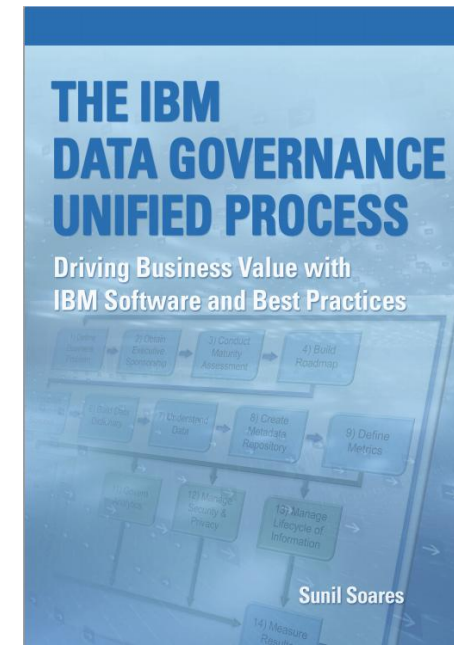
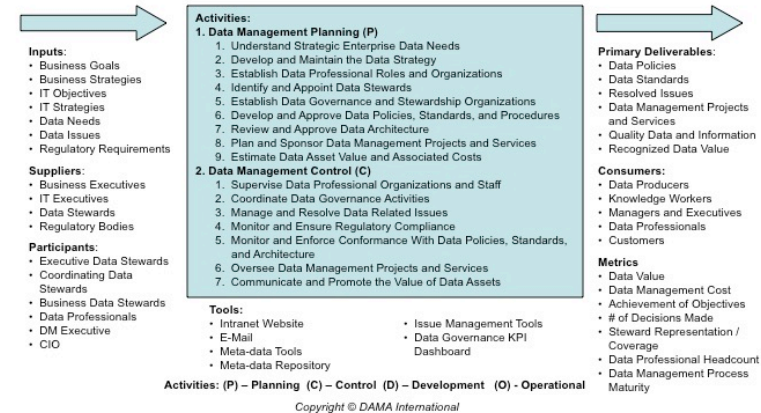
- DAMA DMBOK V1
- IBM Data Governance Framework (free PDF)
- Data Governance Institute
- TDAN
- www.eLearningCurve.com
(Great Training, Great Price)
- ISO 11179-4 MDR

1. Data Governance

Definition: The exercise of authority and control (planning, monitoring, and enforcement) over the management of data assets.

Goals:

1. To define, approve, and communicate data strategies, policies, standards, architecture, procedures, and metrics.
2. To track and enforce regulatory compliance and conformance to data policies, standards, architecture, and procedures.
3. To sponsor, track, and oversee the delivery of data management projects and services.
4. To manage and resolve data related issues.
5. To understand and promote the value of data assets.



#3. Foundation Pillar: Data Governance

Adopt, Adapt ... Reconcile (2/2)

DG Framework	Standards, Policies, Procedures	Align Data Related Activities & Functions	Metadata	Executive Sponsor & Committees * Steering * * Working *	Address Issues & Advise Projects	DG Program Office
DAMA						
IBM (Soares)						
DG Institute (Thomas)						
TDAN (Seiner)						
eLearning Curve (Ladley, Villar)						

#3. Foundation Pillar: Data Governance

Adopt, Adapt ... Reconcile (2/2)

DG Framework	Standards, Policies, Procedures	Align Data Related Activities & Functions	Metadata	Executive Sponsor & Committees * Steering * * Working *	Address Issues & Advise Projects	DG Program Office
DAMA	✓	✓	✓	✓	✓	✓
IBM (Soares)	✓	✓	✓	✓	✓	✓
DG Institute (Thomas)	✓	✓	✓	✓	✓	✓
TDAN (Seiner)	✓	✓	✓	✓	✓	✓
eLearning Curve (Ladley, Villar)	✓	✓	✓	✓	✓	✓

#3. Foundation Pillar: Data Governance

Deliver Standards

- Write standards (Business Metadata) for each attribute
- Approved by Business Data Stewards
- Used by:
 - Data Quality
 - Data Architecture
 - Reference & Master Data Mgmt
 - Etc.
- Cross referenced to the physical tables and columns (Technical Metadata)
- Stored in the Metadata Repository, published as the **“Business Glossary”**

Data Standards

Synchronize business and IT understanding across shared corporate assets.

Establish standards for Data Quality.

#3. Foundation Pillar: Data Governance

Deliver Standards

- Write standards (Business Metadata) for each attribute
- Approved by Business Data Stewards
- Used by:
 - Data Quality
 - Data Architecture
 - Reference & Master Data Mgmt
 - Etc.
- Cross referenced to the physical tables and columns (Technical Metadata)
- Stored in the Metadata Repository, published as the “**Business Glossary**”

ITEM	POLICY STATEMENT
00 Business Glossary Attribute Number	#0001
01 Attribute Business Name	Mobile Phone Number
02 Business Definition	The number given to the mobile telephone of the party.
03 Accuracy	Mobile Phone Number shall be the correct mobile phone number of the party.
04 Completeness: Mandatory /Optional	At least one contact number related to the individual Party must be present, either the Mobile Phone Number, or a Residential Phone Number. 1. Mobile Phone Number is mandatory when the Party is an Individual and his Residential Phone Number does not exist 2. Mobile Phone Number is optional when the Party is not an Individual
05 System of Record	SYSTEM-Alpha Where the Mobile Phone Number exists in multiple systems with different values, the value in SYSTEM-Alpha shall be considered true and the others considered false. Exception: <ul style="list-style-type: none">• SYSTEM-Beta is the System of Record for Consumer & Elite Banking in UAE• SYSTEM-Theta is the System of Record for Sudan
06 Consistency (relationship to other attributes)	N/A
07 Timeliness	Mobile Phone Number shall be reviewed and verified every (period of time) to ensure its timeliness and accuracy. This period of time shall be provided by every Line of Business considering both factors: the capacity of resources to perform the review, and the volume of customers to be reviewed
08 Uniqueness	Mobile Phone number shall be unique for every individual party. The Mobile Phone Number is not shared by multiple individuals.

Start up or Reset

Six Steps Using DAMA DM-BOK

1. Where Are You Now?
→ Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas
2. Develop A Road Map
3. Foundation Pillar: Deliver Data Governance
4. Foundation Pillar: Deliver Data Architecture
5. *Foundation Pillar: Deliver Metadata*
6. Core EIM Pillars Support Improvement

© 2018 All rights reserved

#4. Foundation Pillar: Data Architecture

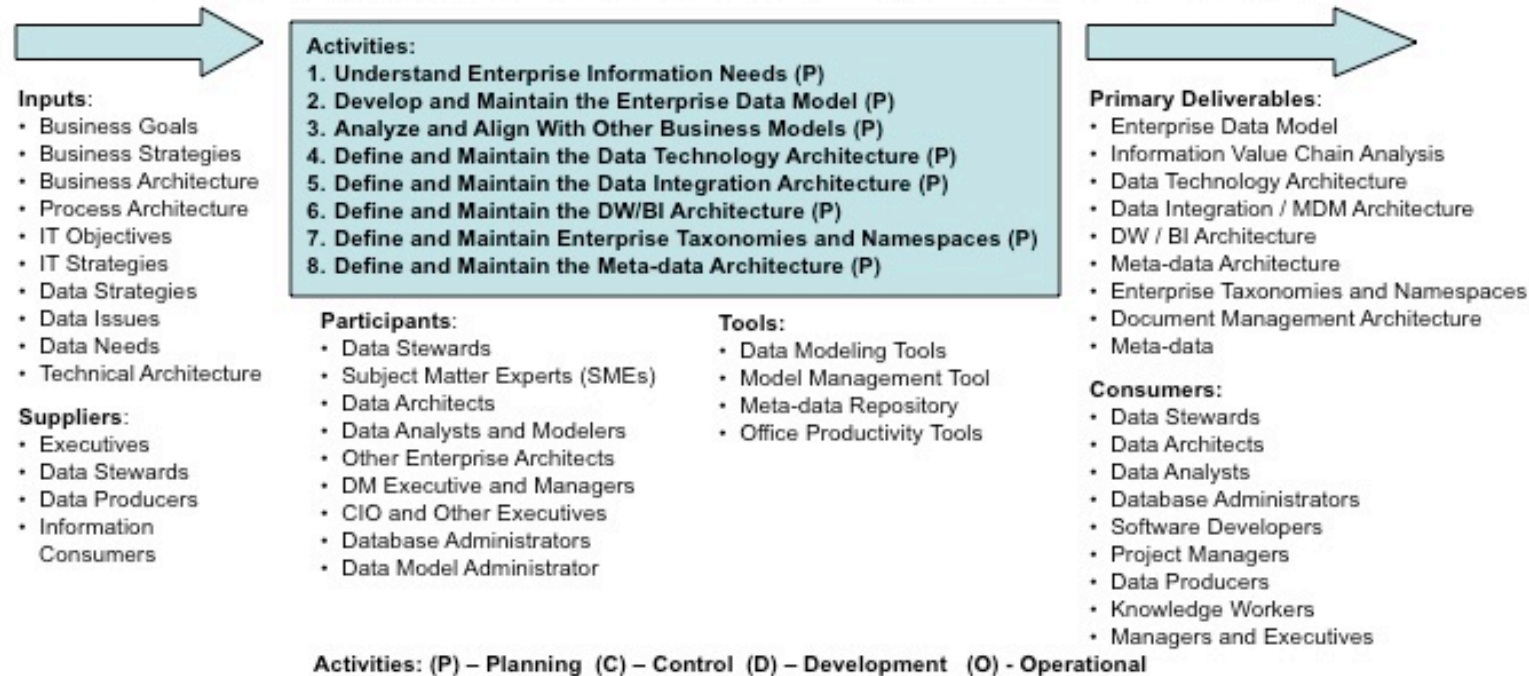
DMBOK1 Context Diagram

2. Data Architecture Management

Definition: Defining the data needs of the enterprise and designing the master blueprints to meet those needs.

Goals:

1. To plan with vision and foresight to provide high quality data.
2. To identify and define common data requirements.
3. To design conceptual structures and plans to meet the current and long-term data requirements of the enterprise.



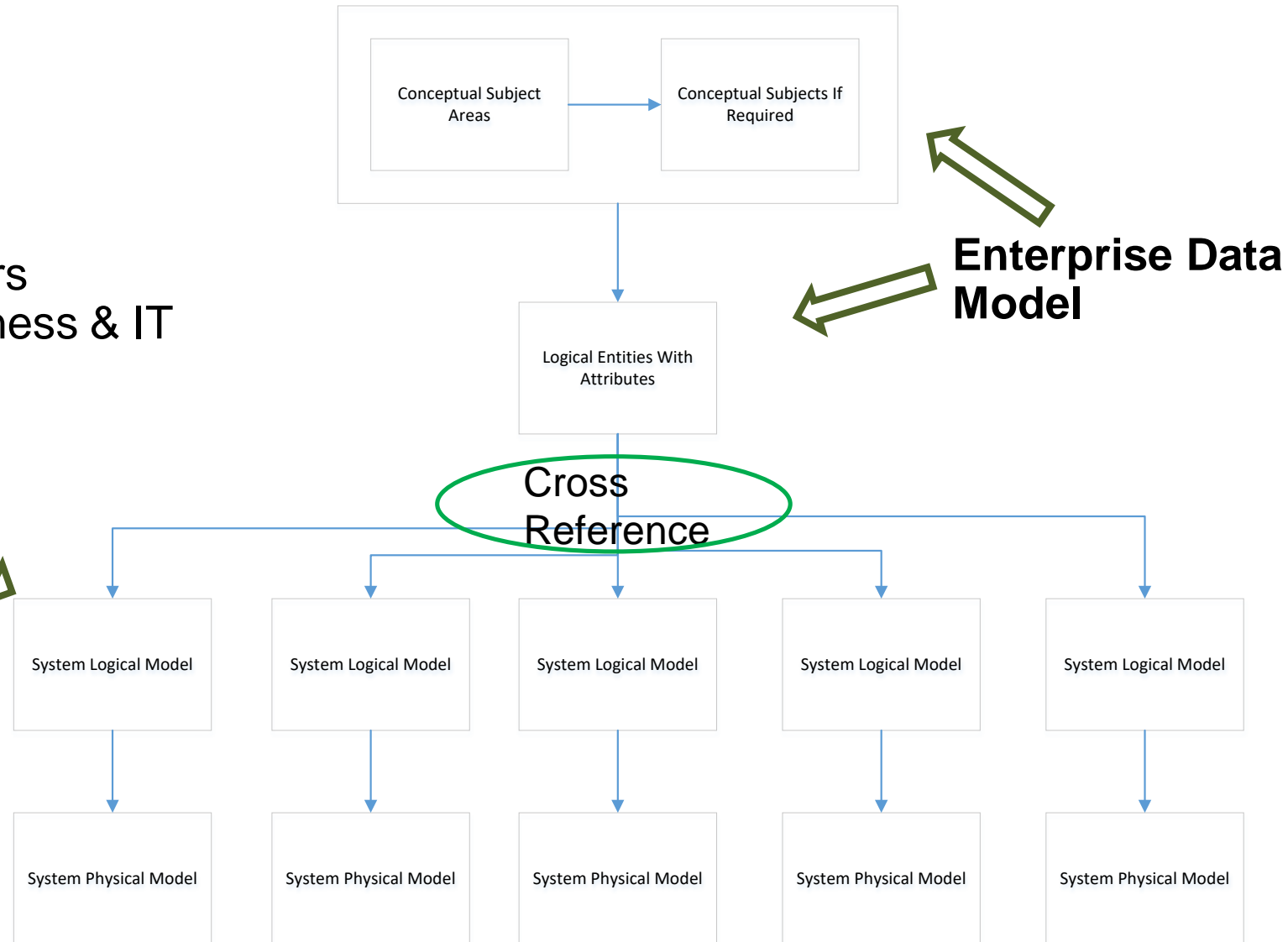
#4. Foundation Pillar: Data Architecture

A Place For Everything...Everything In Its Place

Data Models are:

1. Maps
2. Blueprints
3. Communicators between Business & IT

System Data Models



Start up or Reset

Six Steps Using DAMA DM-BOK

1. Where Are You Now?
→ Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas
2. Develop A Road Map
3. *Foundation Pillar: Deliver Data Governance*
4. *Foundation Pillar: Deliver Data Architecture*
5. **Foundation Pillar: Deliver Metadata**
6. Core EIM Pillars Support Improvement

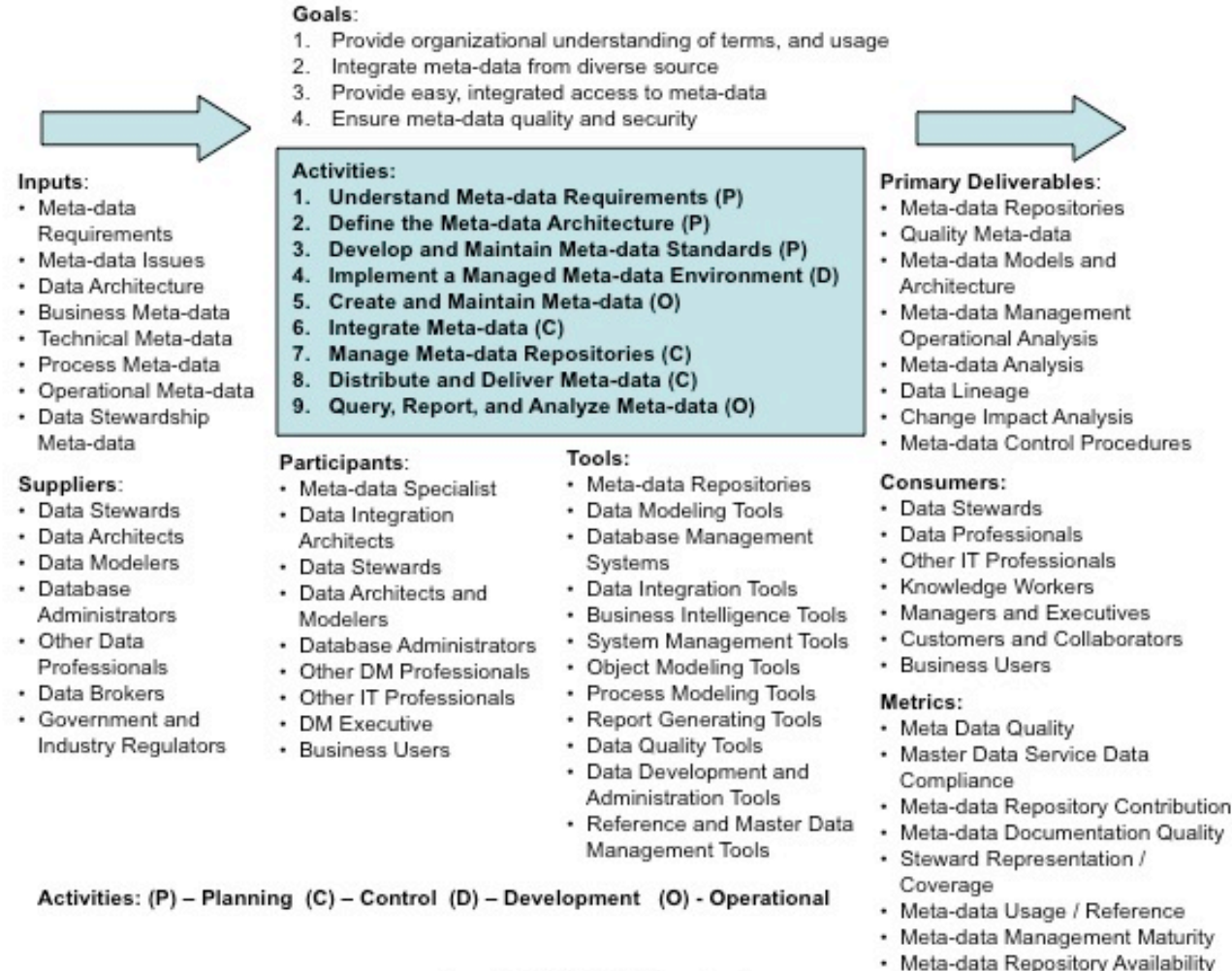
© 2018 All rights reserved

#5. Foundation Pillar: Metadata

DMBOK1 Context Diagram

9. Meta-data Management

Definition: Planning, implementation, and control activities to enable easy access to high quality, integrated meta-data.



Metadata Repository? What's That?

It's A Catalogue!



**The Unforgettable
2018 IKEA® Catalogue**
Remember to get your copy



© Inter IKEA Systems B.V. 2017

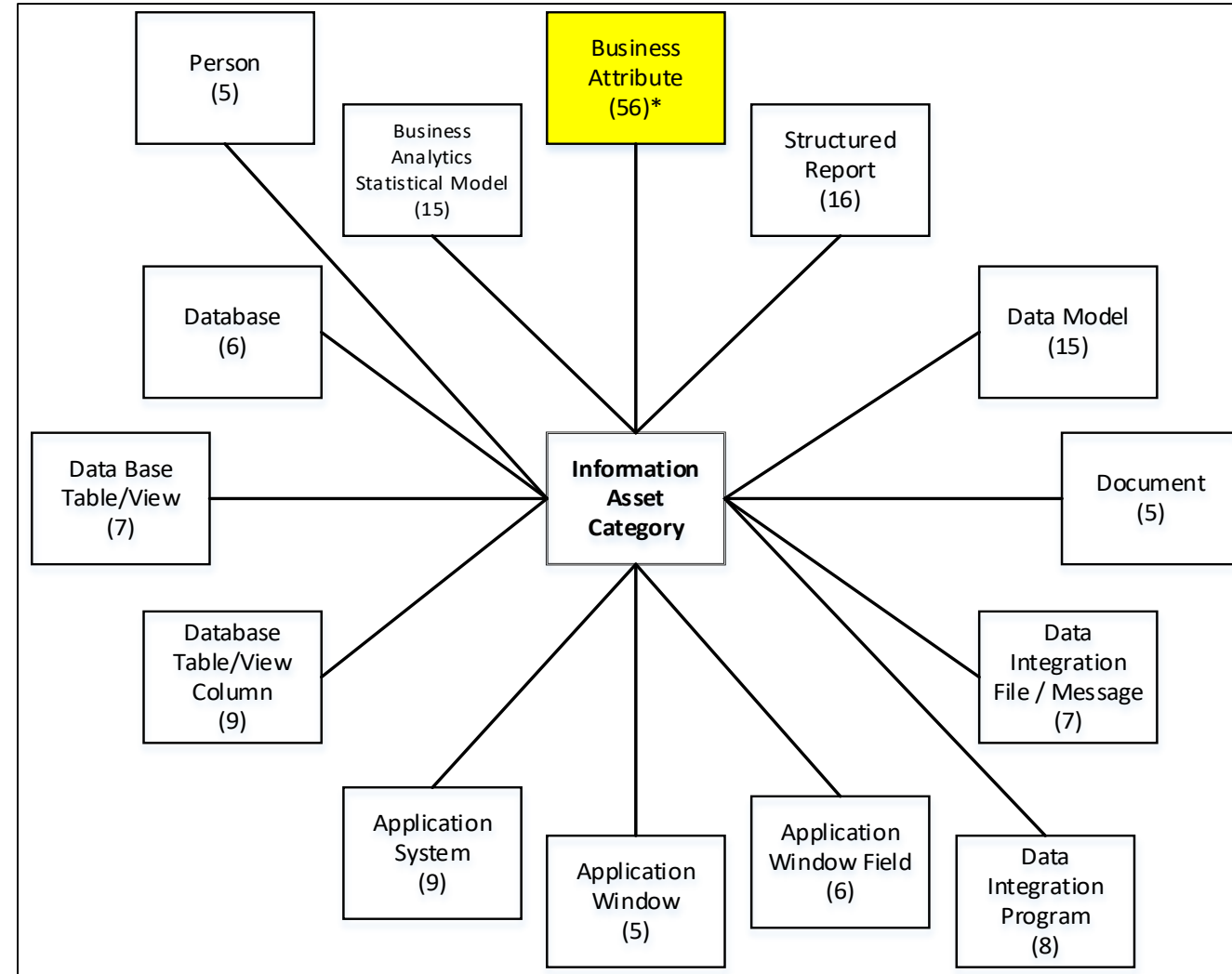
© 2018 All rights reserved

#5. Foundation Pillar: Metadata

How to Start?

1. Buy a business friendly metadata repository software product
2. Populate it: Every type of information asset is catalogued and cross referenced in the metadata repository:

- 14 “Information Asset” categories
- Each category will capture *metadata fields* about objects in that category



#5. Foundation Pillar: Metadata

How to Start?

3. Publish it so the Business Data Stewards (and IT) can use it

4. Call it the
Business Glossary & Information Governance Catalogue

But...Why Invest in Metadata?

To enable:

- Smarter!
- Faster!

The opposite of Smarter, Faster
is playing the game of
Treasure Hunt

Value Proposition:

→ We know what we own ... We know where it's used ... We know where to find it.

© 2018 All rights reserved

#5. Foundation Pillar: Metadata

Why Invest? Return on Investment!

- “Knowledge workers spend from 15% to 35% of their time searching for information” Susan Feldman, ‘The High Cost of Not Finding Information’
- If you have 100 office employees, eliminating only 15% search time (~one hour per day) is equivalent to adding 100 extra hours per day in efficiency savings = 12+ employees.
- ROI: Software + Maintenance versus Efficiency

*Susan Feldman, ‘The High Cost of Not Finding Information’

<http://www.kmworld.com/Articles/Editorial/Features/The-high-cost-of-not-finding-information-9534.aspx>

© 2018 All rights reserved

Start up or Reset


Six Steps Using DAMA DM-BOK

1. Where Are You Now?
→ Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas
2. Develop A Road Map
3. *Foundation Pillar: Deliver Data Governance*
4. *Foundation Pillar: Deliver Data Architecture*
5. *Foundation Pillar: Deliver Metadata*
6. **Core EIM Pillars Support Improvement**

© 2018 All rights reserved

Remember 'Why Data Management/EIM'

= Help Your Business Partner

Maturity Level	Typical Behaviours/Symptoms				Typical Behaviours/Symptoms			
Level 5 Optimizing <i>Continuous Improvement</i>		Progress Is Business As Usual	Open Market Skill Sets	Reduced Operational Risk	Fact Based Decisions	Brainpower & Work Smart	Proactive & Planned	KYC & KYP
Level 4 Managed <i>Effective and Efficient Management</i>								
Level 3 Defined <i>Awareness & Management Begins</i>		Versus				Versus		
Level 2 Repeatable <i>Very Busy</i>		Heroic Activity Waste & Rework	Key Man Risk & Job Security	Increased Operational Risk	Intuition Based Decisions	Manpower & Work Hard	Reactive & Ad Hoc	The Unknown Customer & Too Many Products ³⁴
Level 1 Initial <i>Heroic Efforts</i>								
Level 0 Non-Existent, Not Defined <i>Unaware</i>								

32

© 2018 All rights reserved

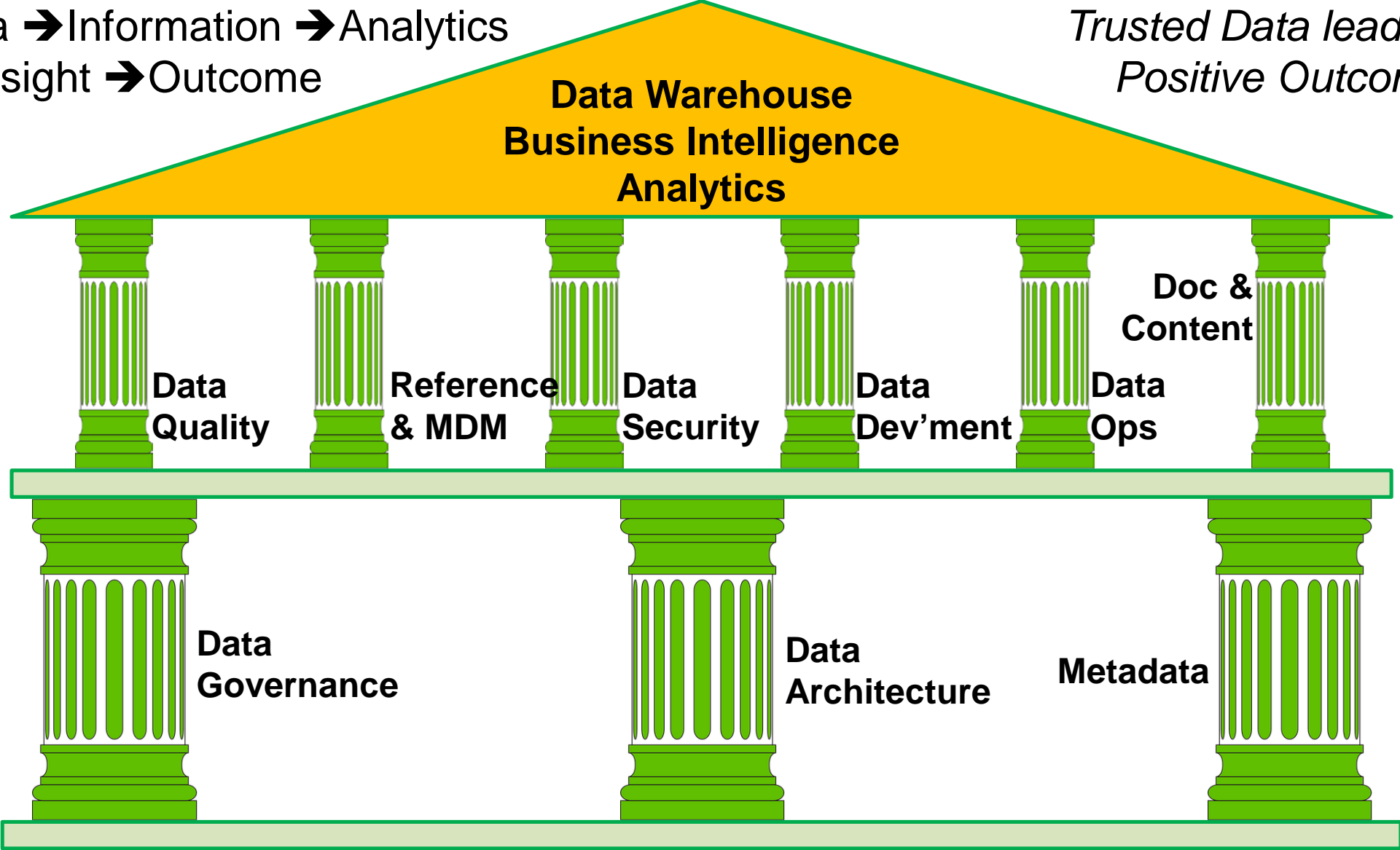
Core DM-BOK Knowledge Areas/Pillars Are Support For Other DAMA/EIM Knowledge Areas



Core DM-BOK Knowledge Areas/Pillars Are Support For Other DAMA/EIM Knowledge Areas

Data → Information → Analytics
→ Insight → Outcome

*Trusted Data leads to
Positive Outcomes*



#6. Core EIM Pillars Support Improvement

Let's pick one...

You want to help your business partners:

1. *Grow from Excel to BI software?*
2. *Self-service BI?*
3. *Reduce time to delivery for new reports?*
4. *Integrate reporting from all business applications and business units?*
5. *Add data mining and predictive analytics?*
6. *Understand business terms across the organization?*
- 7. *Reduce waste, rework and cost associated with poor data quality?***
8. *Trust – Accuracy in applications & reports?*
9. *Trust – Consistency across applications & reports?*

Set Up a Data Quality Competency

© 2018 All rights reserved

#6. Core EIM Pillars Support Improvement

➔ Data Quality Management

DAMA Competency	Contribution to Data Quality
Data Governance	
Data Architecture	
Metadata	

#6. Core EIM Pillars Support Improvement

➔ Data Quality Management

DAMA Competency	Contribution to Data Quality
Data Governance	<ul style="list-style-type: none">• ‘Quality is conformance to requirements’ (Crosby): Data Standards establish the requirements for data type, consistency, referential integrity, domain, etc.• Policy: RACI matrix establishes <u>accountability</u> for data quality.
Data Architecture	<ul style="list-style-type: none">• Context: Data models show the data attributes in context, in all systems, to other attributes: Discovery!
Metadata	<ul style="list-style-type: none">• Lineage: Understand the life cycle, particularly the acquisition and data migration among systems.

Data Quality Standards In the (BGIGC)

Ten Data Quality Dimensions Plus Two Specials:

1. Accuracy
2. Completeness - Mandatory, Optional
3. Consistency
4. Uniqueness
5. Timeliness
6. Validity Data Type
7. Validity Precision
8. Validity Format Pattern
9. Validity Domain Range
10. Default Value

➔ Data Quality Related Business Rules

➔ Data Quality Aggregate Trust Interval (Pass/Fail) **Red** – **Yellow** – **Green**

© 2018 All rights reserved

Data Governance Policy & RACI Matrix

DQ Accountabilities

1. CEO: **Accountable** to the Board of Directors for the quality of data in the organization.
2. CEO Direct Reports: **Accountable** to the CEO for the quality of the data managed by their functions.
3. Data Stewards: **Accountable** to set 10+2 DQ standards.
4. DG PMO: **Accountable** to provide historical DQ Briefing Books on a schedule basis.

© 2018 All rights reserved

Data Quality Management

Briefing Books

1. DQ Profiling Software: Establish your functional requirements & acquire software
2. Profile/Monitor: Regularly scheduled, results go into a historical database
3. Red-Yellow-Green: Establish 'trust intervals' with Data Stewards
Pass Ratios: **Red** 0% - 70% **Yellow** 70% - 90% **Green** 90% - 100%
4. Enterprise BI Software: Quarterly 'DQ Briefing Book' with roll up/drill down based on your org hierarchy
 - a. Board of Directors
 - b. CEO
 - c. Lines of Business (CEO Direct Reports)
 - d. Departments/Teams/Stewards

Data Governance Policy & Data Quality Becomes An Equation

$$A + B = C$$

© 2018 All rights reserved

Data Governance Policy & Data Quality is an Equation

$$\begin{array}{c} \text{Accountability} \\ + \\ \text{Briefing Books For DQ} \\ = \\ \text{Correcting Data Quality!} \end{array}$$

© 2018 All rights reserved

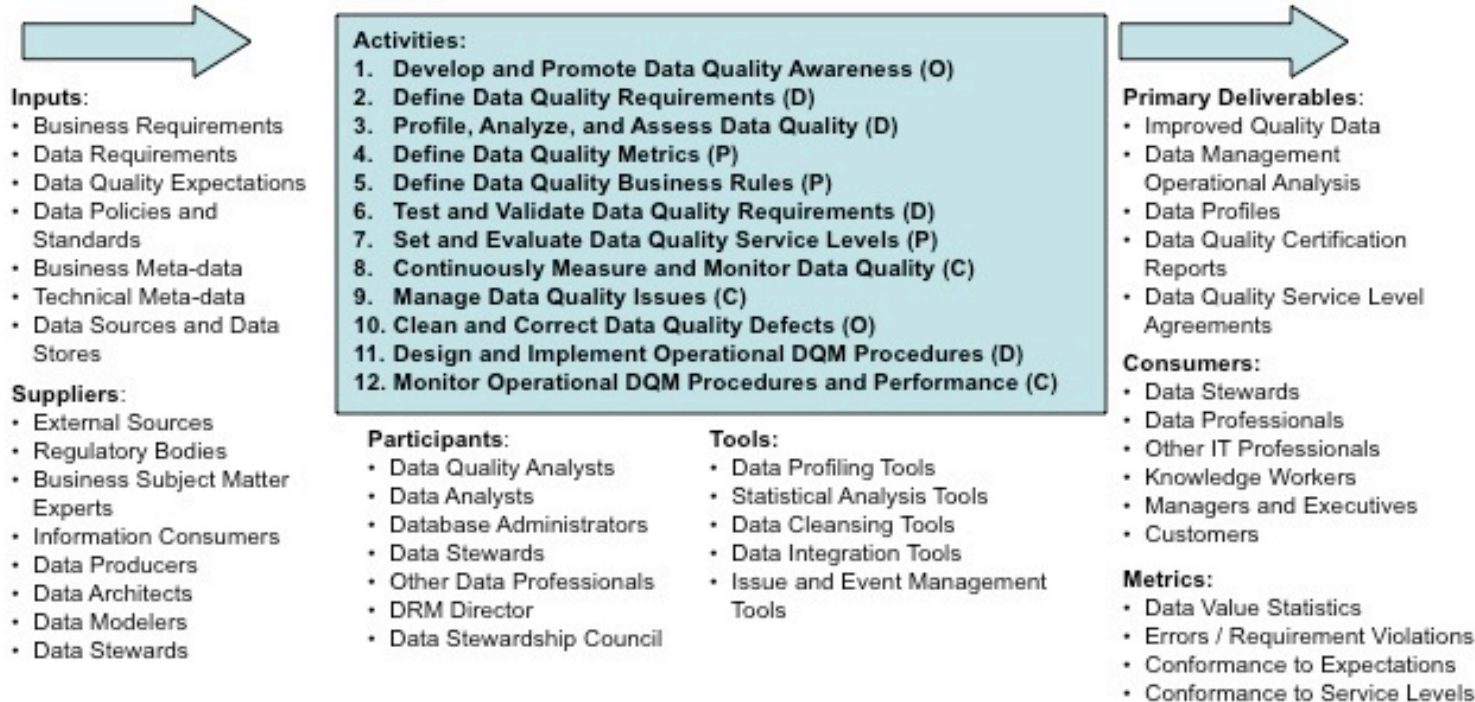
There is a lot more going on in DMBOK1 Data Quality Management

10. Data Quality Management

Definition: Planning, implementation, and control activities that apply quality management techniques to measure, assess, improve, and ensure the fitness of data for use.

Goals:

- To measurably improve the quality of data in relation to defined business expectations.
- To define requirements and specifications for integrating data quality control into the system development lifecycle.
- To provide defined processes for measuring, monitoring, and reporting conformance to acceptable levels of data quality.



Activities: (P) – Planning (C) – Control (D) – Development (O) - Operational

Six Steps – Complete

1. Where Are You Now?

✓ → Gap Analysis: Deliver a Capability Maturity Assessment For DAMA 10 Knowledge Areas

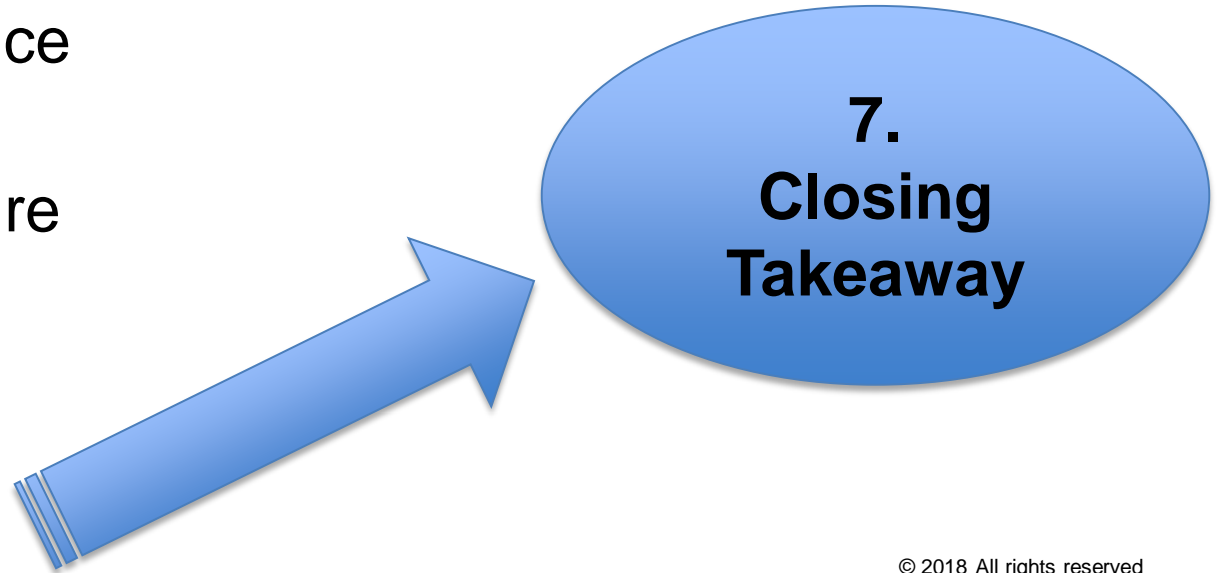
2. ✓ Develop A Road Map

3. ✓ *Foundation Pillar*. Deliver Data Governance

4. ✓ *Foundation Pillar*. Deliver Data Architecture

5. ✓ *Foundation Pillar*. Deliver Metadata

6. ✓ Core EIM Pillars Support Improvement

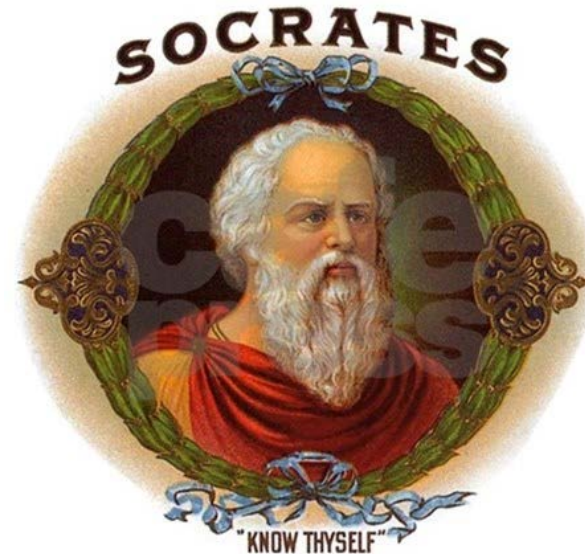


© 2018 All rights reserved

Closing Takeaway (1/4)

Approach

1. DMBOK2: Read & Understand; Achieve CDMP.
2. Starting a data management program from scratch?
 - Six Steps worked for me, could work for you.
3. Work In Progress, but 'something' is wrong? Reset!
 - Step back and see where you are:
The unexamined life is not worth living
 - Six Steps ...



Closing Takeaway (2/4)

Overcoming Hurdles

1. Hiring & Funding Freeze

Remedy: Poach & Train

- Find the unloved 'data people', transfer to your team
- Offer career advancement
'Mastery, Autonomy & Purpose' – *Dan Pink: The Puzzle of Motivation* @ www.TED.com
- Training via eLearningCurve
- Be creative with MS Access & native SQL

2. Hubris – 'We don't need no help here, we're doing just fine.'

"We cannot solve our problems with the same thinking we used when we created them"

~Albert Einstein

Remedy: Become an Agent of Change

- Marketing campaign
- Executive sponsor
- Training via eLearningCurve
- Diplomacy & patience

Closing Takeaway (3/4)

Results

1. Bank #1 → Red Status

- Merger with another bank ended the program, the staff were released or they resigned
- MDM initiative still exists, but skills shortage is a problem
- “Smarter, Faster” with data is not a priority

2. Bank #2 → Green Status

- “Smarter, Faster” with data continues to be a priority
- DG, DQ and Metadata have not lost momentum!
- ‘Key man risk’ situation due to hiring freeze

© 2018 All rights reserved

Closing Takeaway (4/4)

How To Start

1. Begin with the end in mind.

Stephen Covey

2. Reason from 'first principles', breaking down complicated problems into basic elements and then reassemble them from the ground up.

Charlie Munger, Elon Musk, Aristotle

Some assembly required.

© 2018 All rights reserved



Please Contact:

Name Karen Fegarty
Regional Vice President, Sales - NS
T / (902) 420-0646
E / Karen.Fegarty@MarinerInnovations.com
www.marinerinnovations.com

All rights (including but not limited to copyright), title and interest are reserved. This publication contains proprietary and confidential information which is protected by Canadian copyright laws and international treaty provisions. No part of this publication may be reproduced, modified, published, adapted, translated, displayed or transmitted, in whole or in part, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, or stored in any retrieval system of any nature, without the written permission of Mariner Partners Inc.

The contents of this presentation may include Mariner's current view of its product development cycle and future directions. It is intended for information purposes only, and should not be interpreted as a commitment on the part of Mariner. Mariner makes no warranties, express or implied, in this document.

The use of this publication is also governed by the terms and conditions of a Confidentiality, Non-Disclosure and Use Agreement which, in addition to prohibiting disclosure, duplication, copying, reproduction, transcription, digitization and storage in electronic mediums, translation and exploitation of this publication in whole or in part, also restricts its use by the owner. Persons to which this publication has been disclosed by its owner and other readers are bound by these terms and conditions and may obtain a copy from:

Mariner Partners Inc., 1 Germain Street (18th floor), Saint John, NB, Canada E2L4V1



EVOLVE|2018

YOUR FUTURE

YOUR CAREER | YOUR COMPANY | **OUR** INDUSTRY

Hope you enjoyed the presentation!

Please take a moment and complete our

Speaker Survey at: www.pdsummit.ca

Feedback is a gift and its the only way we can make PDS 2019 even better!

© 2018 A