



Collibra accelerated:

How to turn a failed data governance program around

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Today's lineup



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Agenda

01 Why Data Governance programs fail

02 Cautionary tales & keys to success

03 Next steps & resources

04 Q&A

Why Data Governance Programs fail

Poll #1

Why do Data Governance programs fail?

There are a lot of reasons Data Governance (DG) programs fail...

Focus for Today:

- **Lack of alignment to business priorities**
- **Unclear and/or unrealistic expectations**
- **Limited planning (i.e., strategy and roadmap)**

No compelling reason for DG work

No executive buy in or support

Limited transparency or communication

Timing

Unclear DG priorities

Resource constraints

Lack of DG infrastructure*

DG infrastructure* is not realistic or sustainable

DG work does not provide value for the organization

Limited policies, processes, or standards

Limited or no enforcement

Lack of DG roadmap with milestones and measures

De-prioritization of DG work

Inefficient DG processes

DG tools not set up for key user groups

And many more...

* Infrastructure refers to people, process, and technology to support Data Governance efforts

Cautionary tales & keys to success

Cautionary Tale #1

Insurance Company

Background

- Ten years ago, they set up a formal Data Governance Policy and committees
- The committees never met
- Two years ago, the CFO initiated replacement of their Core Insurance System
- CFO recognized Data Governance as a dependency for the implementation
- They called us for help
- Data Governance was operational in less than four months

Poll #2

In this example, what was the key to achieving sustainable Data Governance?

Cautionary Tale #1

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Key to Success #1

Align to Business Priorities

Solution

- Aligned the work of Data Governance to a key organizational priority
- Provided coaching to the team for how to talk about Data Governance in terms of value for the business
- Created communication materials that were use consistently and widely

Success Story #1

Align to Business Priorities

Sources of business priorities

Align Data Governance to what *really* matters for people

Pain Points

- Data issues that make work more difficult for a large number of people
- Example: Inability to bring data together across systems and/or business units

Key Data-Centric Initiatives

- Initiatives that significantly impact the organization's data
- Example: System Transformations

Organizational Objectives

- Priorities set by executive leaders for the whole organization to follow
- Examples: Strategic Plan, KPIs

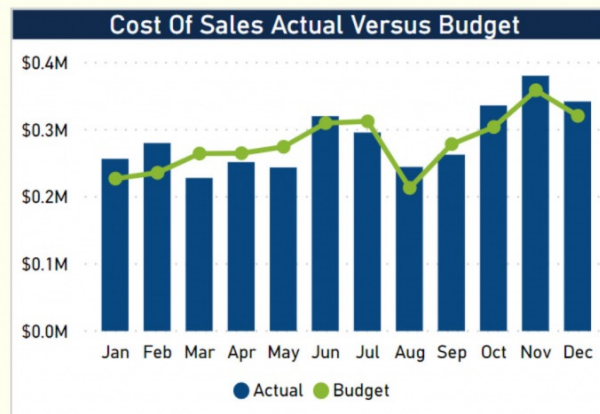
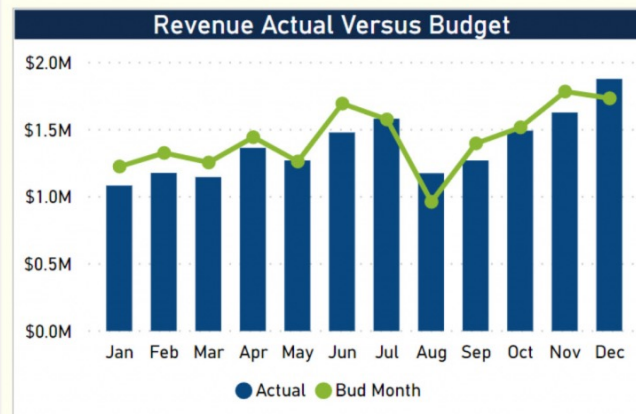
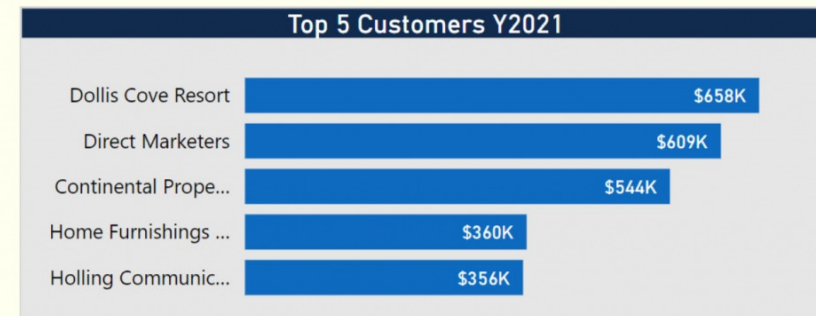
Pain Point Example: Executive Dashboard

Inability to bring data together across business units

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Revenue				
Month	Actual	Budget	Var %	Diff
January	\$1,084K	\$1,226K	-12%	(\$142K)
February	\$1,179K	\$1,327K	-11%	(\$149K)
March	\$1,148K	\$1,256K	-9%	(\$108K)
April	\$1,365K	\$1,444K	-5%	(\$79K)
May	\$1,272K	\$1,264K	1%	\$8K
June	\$1,479K	\$1,695K	-13%	(\$215K)
July	\$1,582K	\$1,577K	0%	\$6K
August	\$1,176K	\$963K	22%	\$213K
September	\$1,271K	\$1,398K	-9%	(\$127K)
October	\$1,493K	\$1,518K	-2%	(\$25K)
November	\$1,629K	\$1,785K	-9%	(\$156K)
December	\$1,879K	\$1,734K	8%	\$144K
Total	\$16,557K	\$17,187K	-4%	(\$629K)

Cost Of Sales				
Month	Actual	Budget	Var %	Diff
January	\$257K	\$227K	13%	\$29K
February	\$280K	\$236K	19%	\$44K
March	\$228K	\$265K	-14%	(\$36K)
April	\$252K	\$265K	-5%	(\$13K)
May	\$244K	\$275K	-11%	(\$31K)
June	\$320K	\$310K	3%	\$10K
July	\$296K	\$312K	-5%	(\$17K)
August	\$245K	\$213K	15%	\$31K
September	\$263K	\$279K	-6%	(\$16K)
October	\$336K	\$304K	11%	\$32K
November	\$380K	\$359K	6%	\$22K
December	\$342K	\$321K	7%	\$21K
Total	\$3,443K	\$3,365K	2%	\$78K



Pain Point Example: Analytics pain points

Current analytics pain points that will be addressed by Collibra

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- Across business processes, discovering data accounts for 80% for analytical projects today
- Many times, a model has already been created to answer analytic questions, but we just don't know that it exists
- We only know about data in our own silos
- We are not capturing rich data knowledge from people leaving the organization
- We do not know which data sources are “trusted”

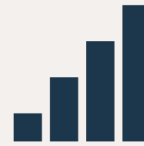
Example: Business Goals and Objectives

Goals articulated by the business as a reason for implementing Data Governance

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Increase customer success
with efficient processes



Enable decision-making



Support the sales and
service performance
ecosystem

Data Governance Supports this by:

- Consolidating/relating multiple customer accounts
- Enacting clear definitions of account types, contact types/roles
- Optimizing process/data interactions
- Enabling Customer Segmentation
- Enabling multiple hierarchies for specific business needs
- Empowering the business to make decisions about their data
- Improving Customer Contact quality with standards and mastering
- Clarifying account/contact ownership and how it is represented in data
- Measuring data quality across the customer lifecycle

Initiative Example: ERP Implementation

Transformation success requires trusted data

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Human Capital Management Performance

Recruitment and attraction

- ✓ Recruitment spend
- ✓ Cost per hire
- ✓ Time to hire/time to fill
- ✓ Time to productivity/performance
- ✓ New hire turnover

Productivity and performance

- ✓ Revenue per employee
- ✓ Profit per employee
- ✓ Human capital return on investment
- ✓ Absenteeism rate
- ✓ Absence rate per manager
- ✓ Overtime
- ✓ Goal achievement
- ✓ 360-degree feedback

Financial Performance

- ✓ Gross Profit Margin
- ✓ Net Profit Margin
- ✓ Working Capital
- ✓ Current Ratio
- ✓ Quick Ratio
- ✓ Leverage
- ✓ Debt-to-Equity Ratio
- ✓ Inventory Turnover
- ✓ Total Asset Turnover
- ✓ Return on Equity
- ✓ Return on Assets
- ✓ Operating Cash Flow
- ✓ Seasonality

Transformation success requires trusted data

Most transformation initiatives focus on technology and process, which limits ability to achieve implementation goals

The typical transformation approach creates a “Transformation Island”

Scope is limited to technology and process for the new tool, ignoring downstream impacts to data and analytics.

Typical Transformation Data Scope:

- ERP Data Requirements
- Data Cleansing
- Data Migration & Conversion
- Post-Launch Data Issues



Required Data Scope:

- Metadata: Document project data knowledge
- Governance: Manage upstream & downstream boundary impacts
- Data Management Data Quality: Drive post-launch data optimization & value



Cautionary Tale #2

Bank

Background

- Mid-sized regional bank
- Had an established Data Council and sponsorship
- Established Stewardship Councils to document business metadata
- Stewardship Councils expected to disband after initial metadata collection
- We were called in because people weren't using metadata and the Data Council wanted to "finish Data Governance"
- We found disorganized chaos



Poll #3

In this example, what did we need to change to achieve sustainable Data Governance?

Cautionary Tale #2

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Cautionary Tale #3

Manufacturer and Retail

Background

- LARGE, international organization
- Heavily siloed operations, moving towards enterprise applications and analytics
- Each silo attempted Data Governance in the past with varying degrees of success
- Enterprise Data Governance was limited to a policy (that most people didn't know existed)
- They called us to help establish enterprise Data Governance
- Enterprise Data Governance was operational in six months



Poll #4

In this example, what needed to change to make enterprise Data Governance successful?

Cautionary Tale #3

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Key to Success #2

Set Clear Expectations

Success Story #2

Make Data Governance Real

Solution

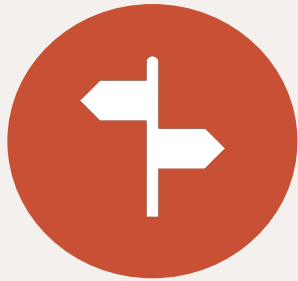
- Re-framed Data Governance as a FUNCTION rather than PROJECT
- Clearly articulated:
 - The scope of Data Governance in the Data Governance policy
 - Roles and responsibilities in Charters and a RACI
 - Initial priorities and work in a Data Governance Roadshow
- Communicated widely about the work of Data Governance (i.e., we made it real for folks)

How Data Governance Works

Data Governance is a collaboration between the business and IT

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Establish the “rules
of the road”



- ✓ **Guidelines:** Acceptable Use
- ✓ **Standards:** Data Quality Standards
- ✓ **Policies:** Data Privacy Policy

Build structures to enact
and enforce the “rules”



- ✓ **Teams:** Data domain Steering Committees and Working Groups
- ✓ **Processes:** Data issue reporting and resolution process

Support use of “rules”
when working with data



- ✓ **Educate** data users about “rules of the road”
- ✓ **Facilitate** sensitive conversations about data
- ✓ **Enforce** policies and standards

What is a Data Steward?

Trusted Subject Matter Expert in the operations of their respective business units and assigned data domain(s)

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RACI Diagram

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The RACI below shows *sample* processes, roles, and responsibilities for Data Management and Governance related activities.

Process	Governance Activities	Data Governance Council	Business Stewardship Council	Data Ownership Group	IT
Leadership	Funding and sponsorship	A, R	C	C, R	I
	Activity prioritization	A, R	C	C, R	I
	Data Governance within a domain	I	R	A	C
	Data Governance initiatives	A	R	C	C, I
	Data and measure definitions	I	R	A	I
Organization	Identify data owner(s)	A, R	I	C	I
	Identify data steward(s)	I	C	A, R	I
Lifecycle Management	Data retention guidelines	I	A	I	R
	Implementing lifecycle policies	I	A	C	R
	Business rules for data CRUD	I	R	A	C
Processes	Establish a data issue remediation process	A	R	C	I
	Conflict resolution	A	R	C	C

R: RESPONSIBLE (at least 1) - Primary person or people doing the activity

A: ACCOUNTABLE (only 1) - Person with decision-making authority

C: CONSULTED (some) - People or groups included in activity

I: INFORM (many) – People or groups that need to be informed about an activity. They need to know the information to execute their assignments, but do not need to be involved in completing the activity

Cautionary Tale #4

Healthcare System

Background

- Attempted to establish Data Governance to save a failing major system transformation
- Stewards had no time to learn about Data Governance best practices or to establish sustainable processes
- There was no plan to continue or expand data stewardship following the transformation
- We were called in because all content created for the transformation was still in “candidate” status

Poll #5

Why didn't Data Governance “stick” after go live?

Cautionary Tale #4

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Cautionary Tale #5

University

Background

- Institutional culture intentionally siloed and decentralized to allow innovation
- Evaluating and updating most/all core, shared systems
- Executive leadership recognized value of enterprise Data Governance as a dependency
- Limited enterprise resources available to align Data Governance with systems transitions
- Brought us in to establish a scalable approach

Poll #6

What was the big challenge we had to address to get Data Governance buy-in?

Cautionary Tale #5

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Key to Success #3

Create a Realistic and Useful Roadmap

Created a Realistic, Useful Roadmap

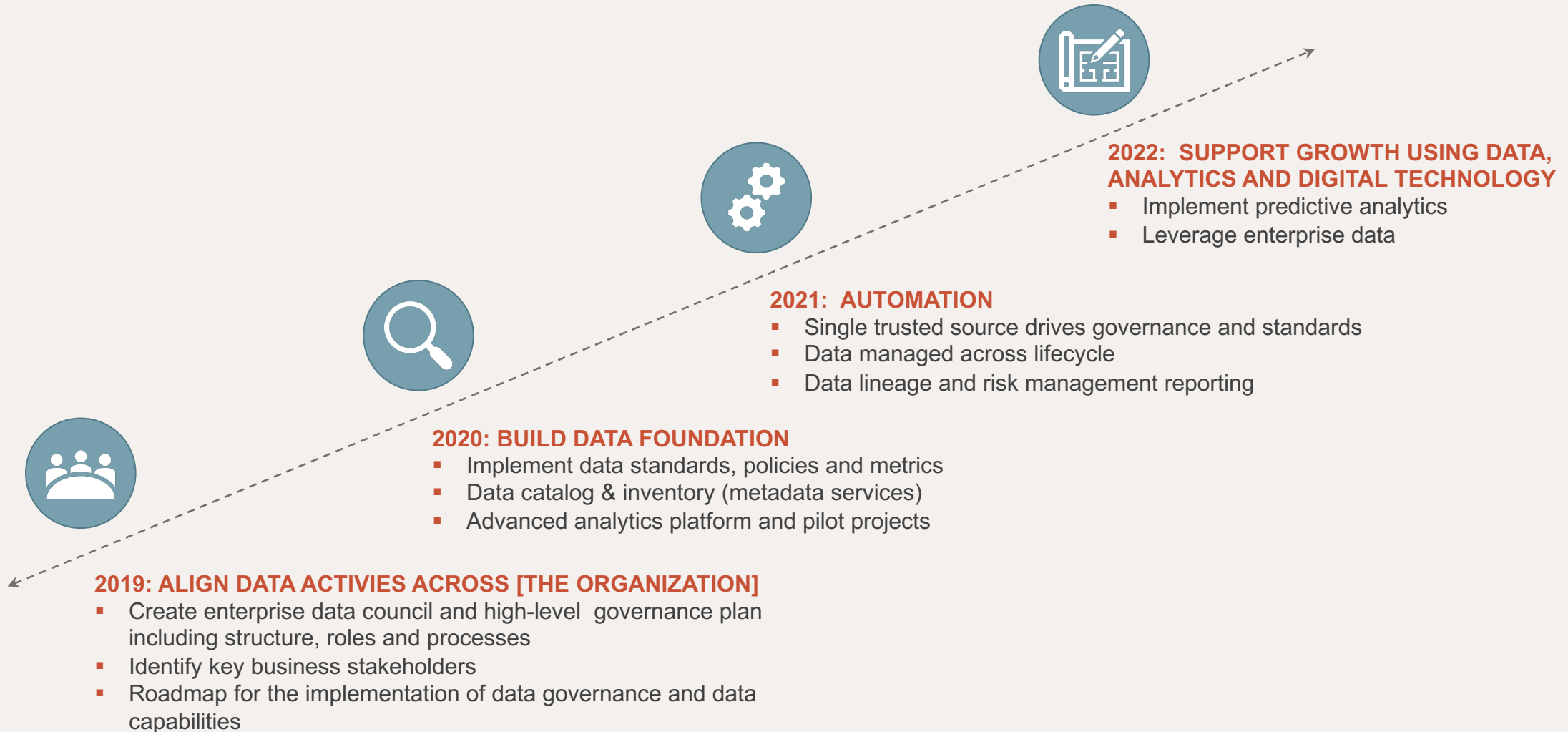
Solution

- Identified relevant organizational objectives(s)
- Established initial Data Governance priorities to achieve identified objective(s)
- Established milestones to demonstrate incremental value
- Planned activities to achieve milestones
- Used the Roadmap for communication and to get buy in from stakeholders

Data and Analytics Roadmap

Draft roadmap illustrating data priorities over the next four years

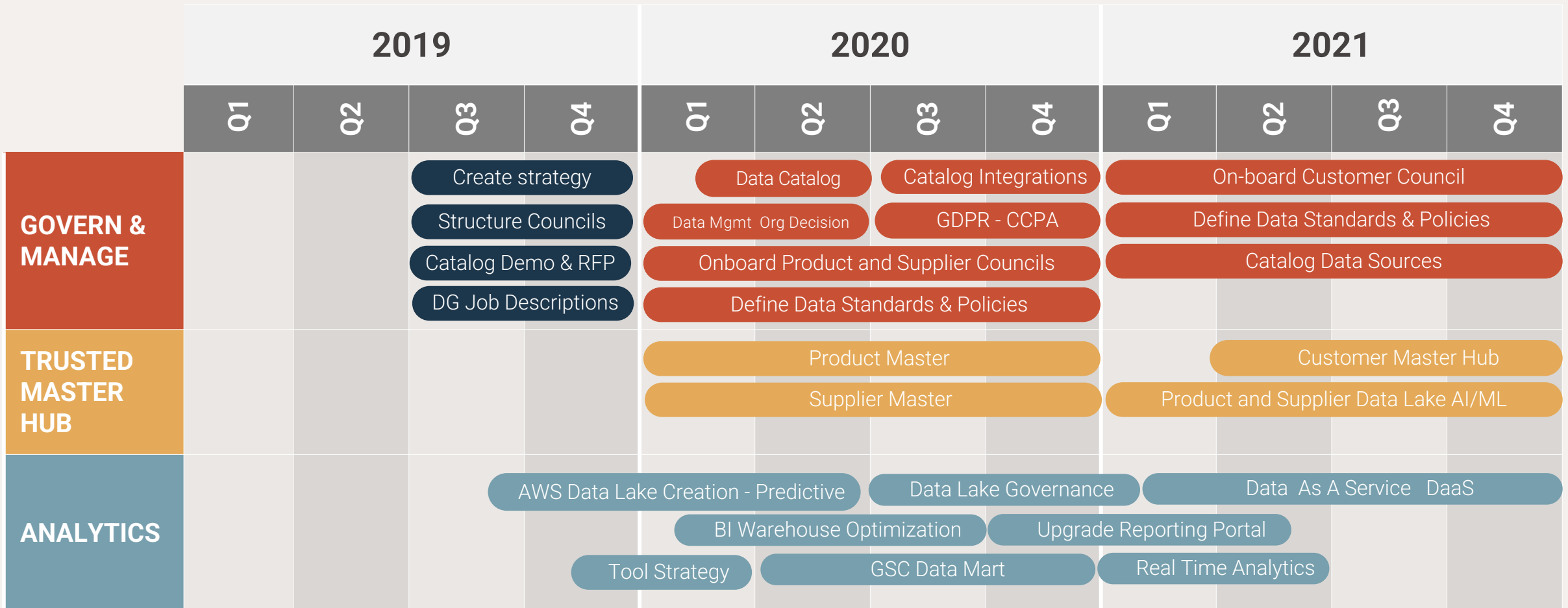
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Enterprise Data and Analytics Plan

Key activities to execute the Data and Analytics Roadmap

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Collibra Line-of-Sight to Vision and Data Goals

Leverage Collibra to drive trust, transparency, and accountability for critical data

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Drive the business to take accountability for the quality of the data they use or create



Support effective management of data as business and technical asset



Enable understanding of data to drive more effective and nimble business insights



Enable data quality efforts to be focused where they are most needed



Support alignment of data management capabilities within the Data Office

Find who is accountable for given data

Find where data is created and used

See what data exists (both business and technical context)

Use process to keep metadata current and complete

Focus on intuitive and consistent tool for users

Support Data Literacy efforts

Understand business criticality including regulatory impact

See data flows
Manage data Issues

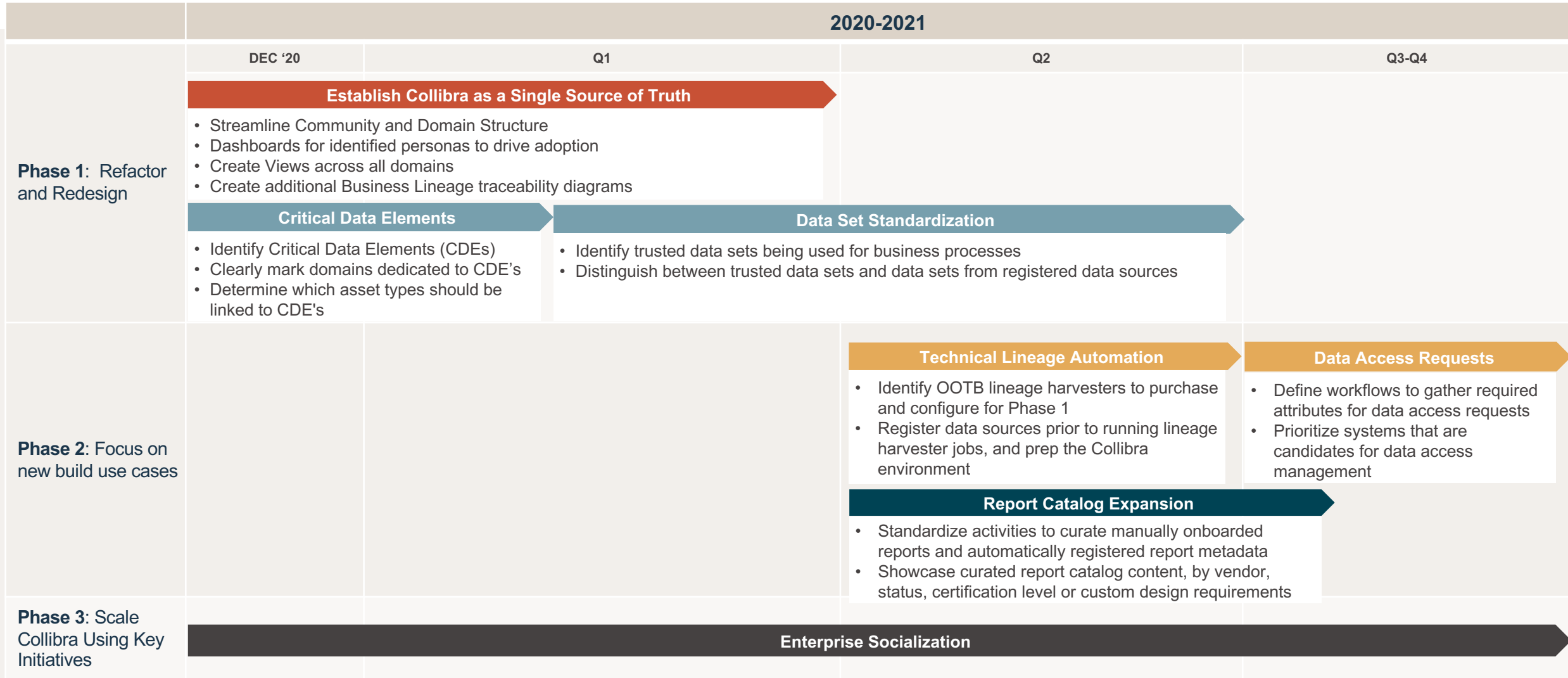
Align metadata across data management capabilities

Ensure Data Office stakeholders have clear accountability for metadata capture

Year 1: Collibra Expansion

Move from inconsistency to a refactored and optimized environment

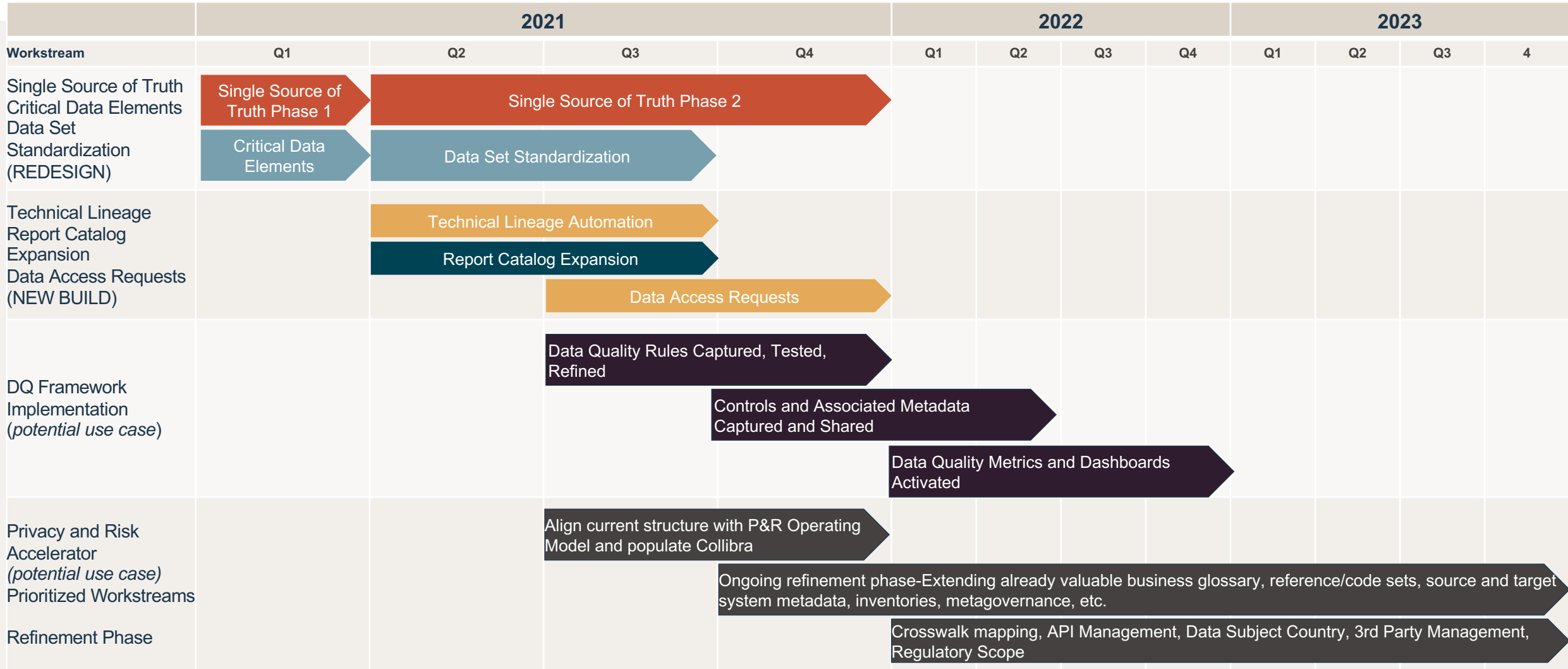
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EXAMPLE



3-Year Plan: Collibra Expansion and Maturity

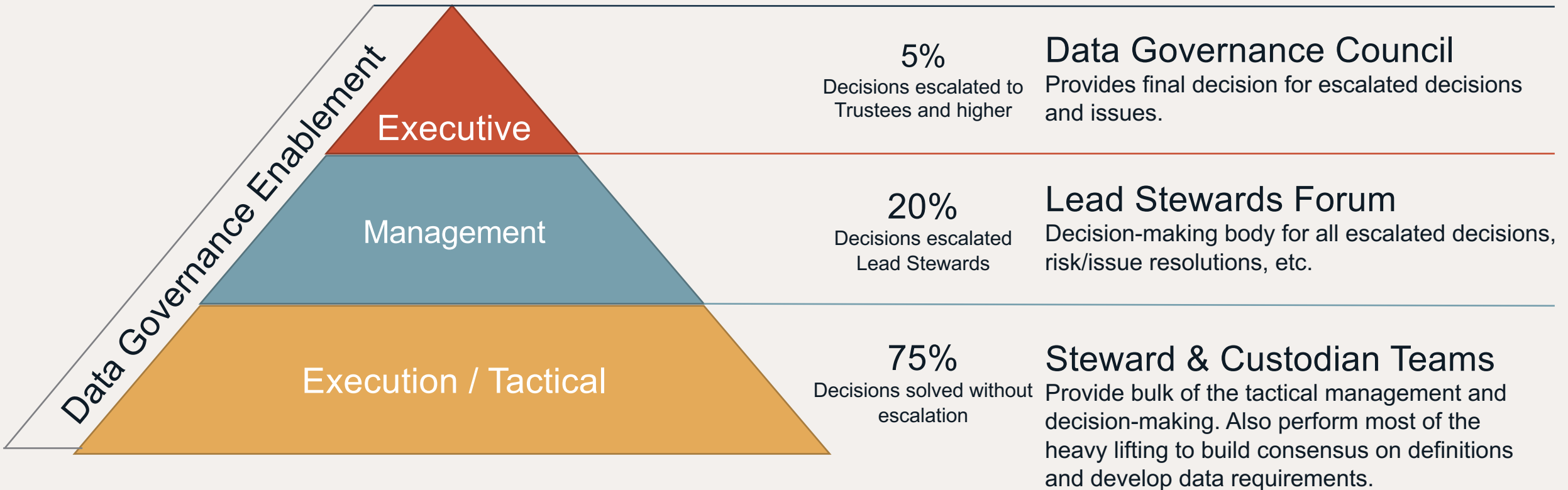
REAL LIFE
EXAMPLE

Embed Collibra into key processes and initiatives



Who do you work with?

Use a Data Governance Operating Model if you have one



Summary

Tips and Tools

Keys to Success	Tools - Examples that have worked well
Align to business priorities	<ul style="list-style-type: none">• Sources of business priorities• Pain points, initiative, and business goals examples
Set clear expectations	<ul style="list-style-type: none">• Data Governance definition and metaphor• Tactical role description slides with initial priorities• Sample Data Governance RACI
Create a realistic and useful roadmap	<ul style="list-style-type: none">• Steps to create a realistic and useful roadmap• Sample roadmaps

Additional resources

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Any questions?

