

# Data Governance

Please sign in with First & Last Name  
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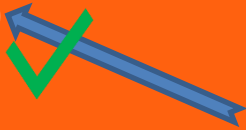
When not speaking,  
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If you are dialed in by phone only, you need to send an e-mail to [BRT@pmiwestchester.org](mailto:BRT@pmiwestchester.org) /  
[LnLTeam@pmiwestchester.org](mailto:LnLTeam@pmiwestchester.org)  
with your **name and phone number** – otherwise we will not be able to vouch that you have  
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# PMI Westchester Lunch & Learn

March 17, 2020  
March 17, 2021



## DATA GOVERNANCE

# Importance Of Data Quality - Agenda

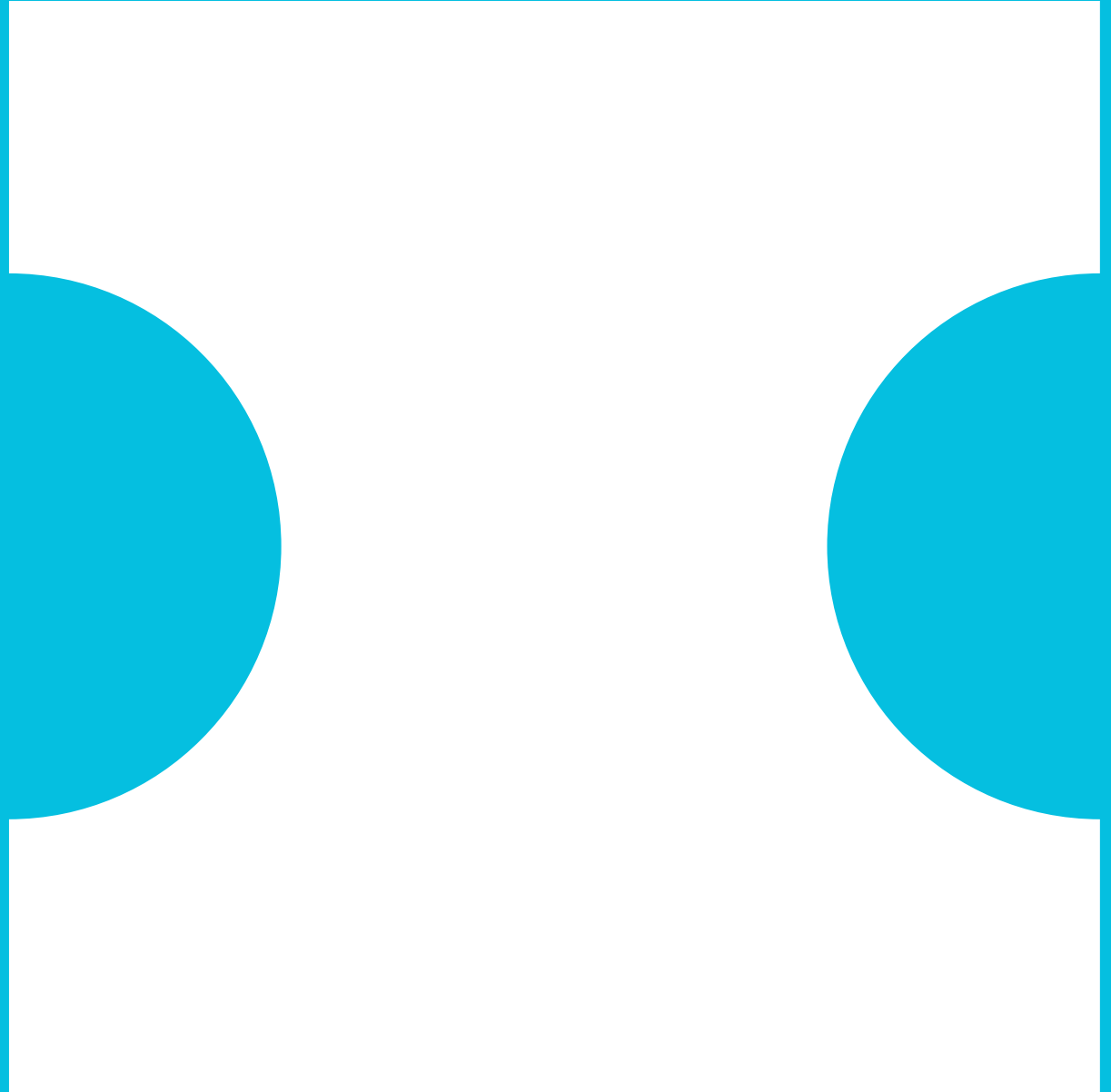
- Introduction
- Why Data Governance?
  - Step Back: Why Data Collection?
- Benefit Requirements
- Good Data Quality Company Progression
- Data Governance Helps Data Quality
  - Company Asset vs Company Liability
- Business Objectives
- Data Usage
  - Who Is Using The Data?
  - How Is The Data Being Used?
- Required Data Points
- Analytics
- Developing Governance Plan
  - Key Balance
  - Define Your Data
  - Define Your Quality Standards
  - Governance vs Guardianship
    - Governance
    - Guardianship
    - Implementation

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## Introduction

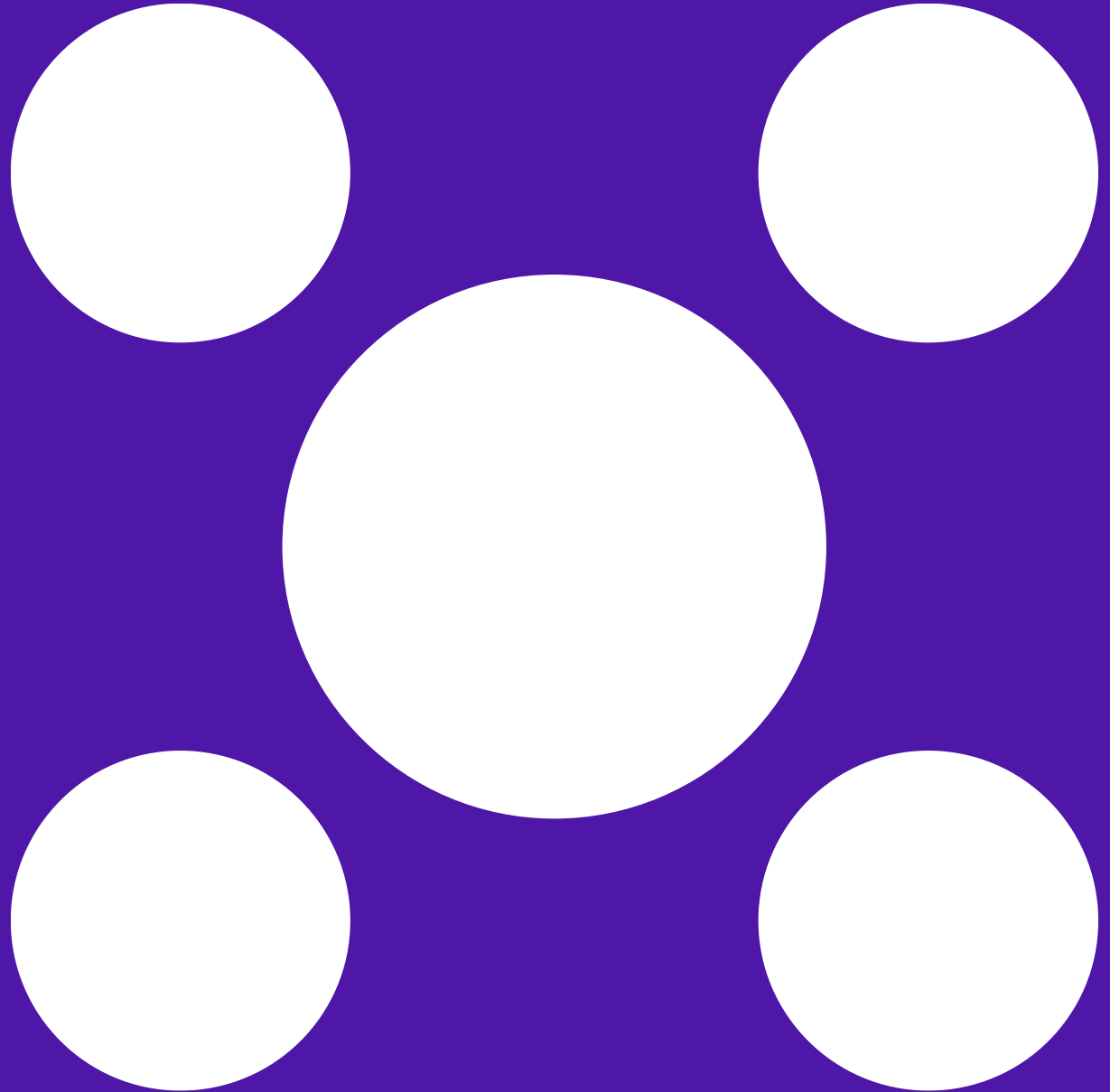
Robert Walsh, PMP



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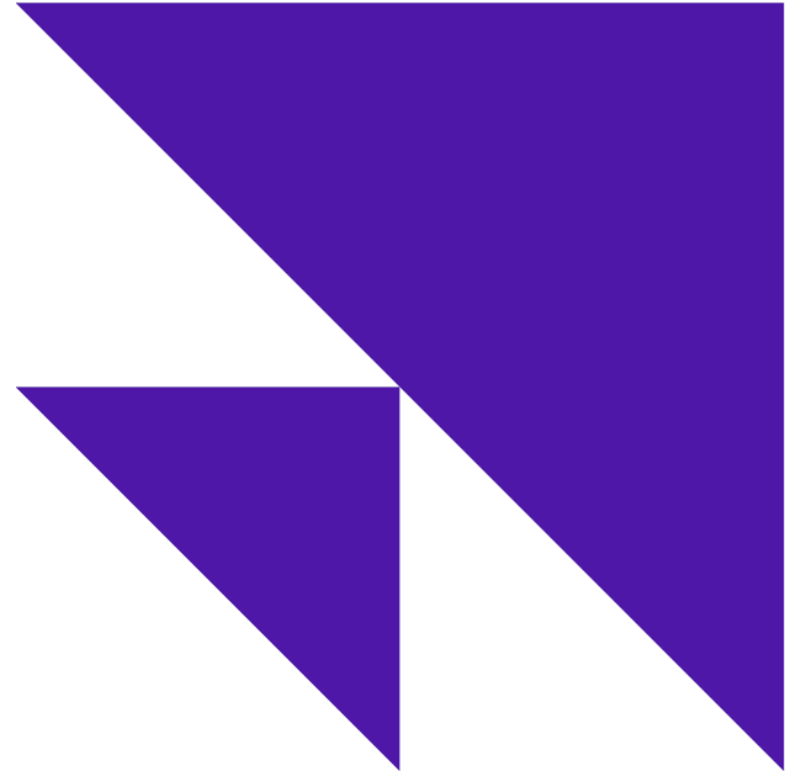
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## Why Data Governance?



# Why Data Governance?

- Step Back
  - Why Data Collection??





# Why Data Collection? - Continued

- Finger On The Pulse
  - Tells Us What We Are Doing Well
  - And Not So Well
- Informed Decision Making
- Helps Internal Funding Sales
- Issue Identification
- More Accurate Theorizing
  - Data Can Help Back Your Strategic Advice
- High Level
  - Improved Quality Of Life
    - Measuring Situations And Taking Smart Actions Results In Less Complications And Fewer Frustrations
- Saves Time
  - Ex: Saves Time For All Above!



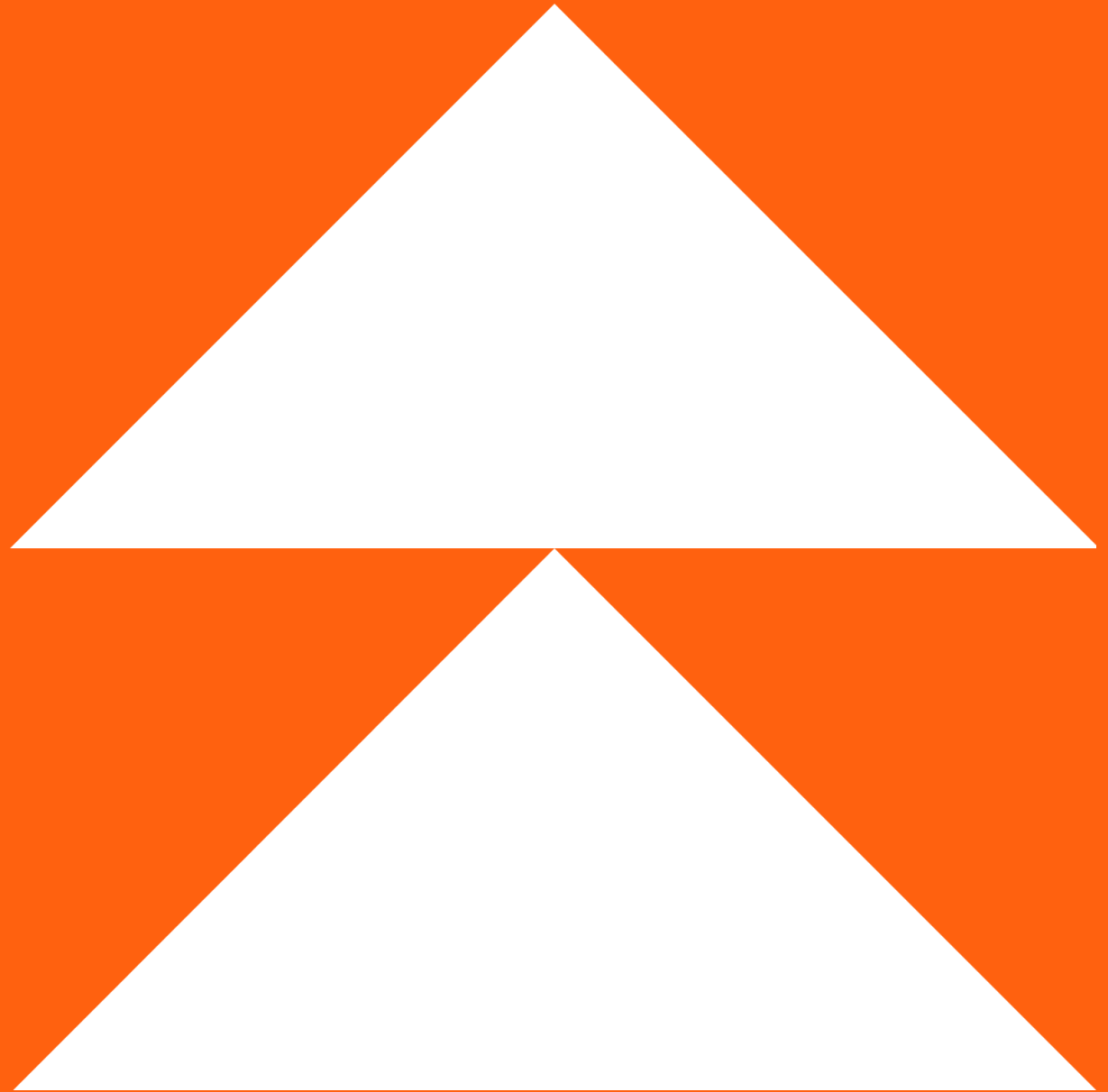
# Why Data Governance?

- Returning From Why Data Collection:
  - What Does It Take To Create A Centralized Data Source (Ex: Customer Data)?
    - A Lot Of Effort!
  - Common Data Quality Issues
    - Duplicate Data
    - Missing Data
    - Incomplete Data
    - Inaccurate Data
    - Outdated Data
    - Data Security
  - What Results From Common Data Quality Issues?
    - Employee Productivity Issues
    - Frustrating Customer Experiences
    - Advantage For Competitors With Good Data

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## Benefit Requirements



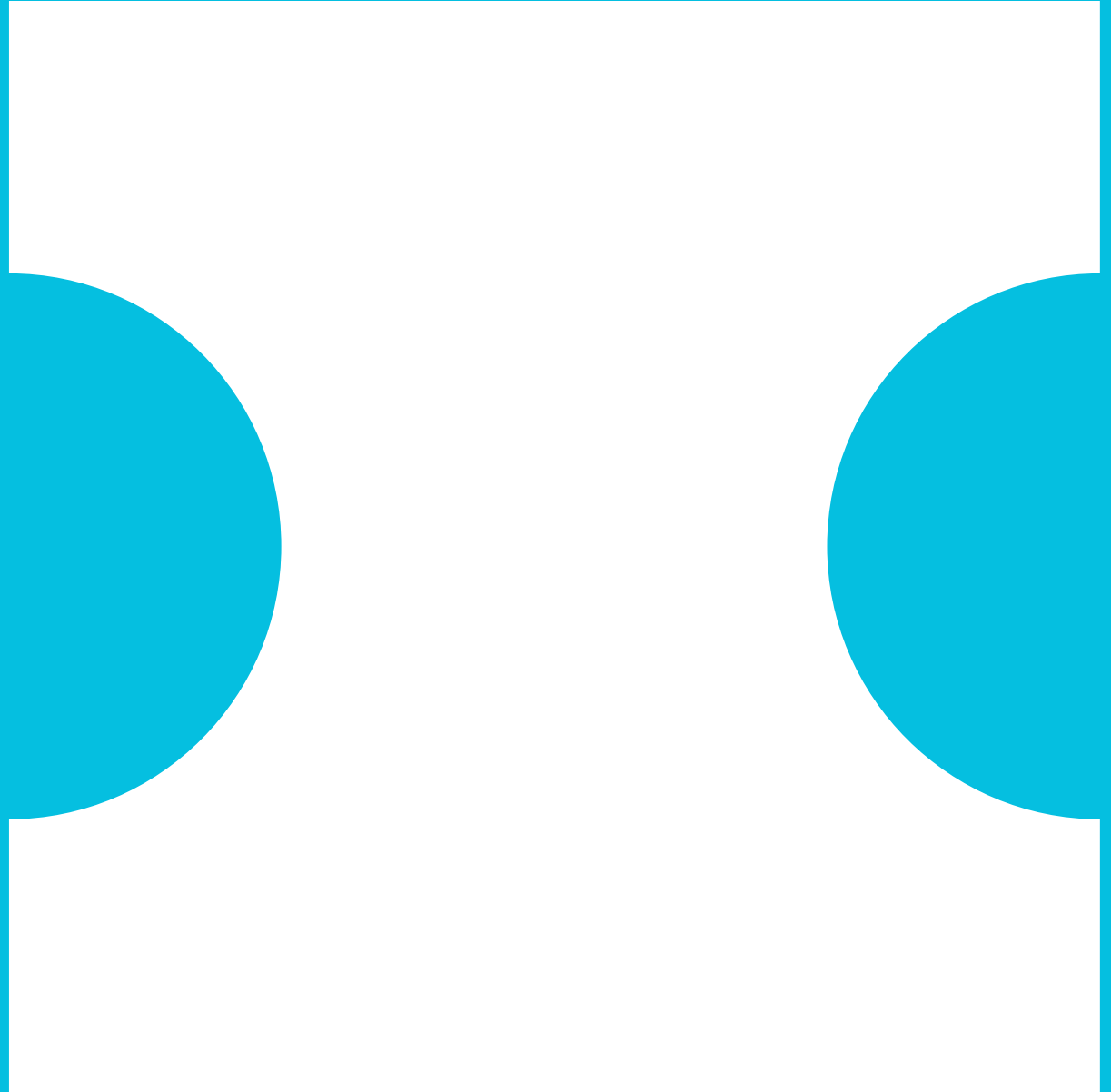
# Benefit Requirements

- What It Takes To Benefit From Costly Data Related Projects
  - Example Projects
    - ERP Replacement
    - Data Cleansing For Existing System
    - Automated Technology Investments
      - Automations
      - IoT
      - AI
  - Benefits Require:
    - Policies & Processes To Help Ensure
      - Desired Framework Is Followed
      - Good Data Collection
      - Good Data Maintenance
      - Good Data Security

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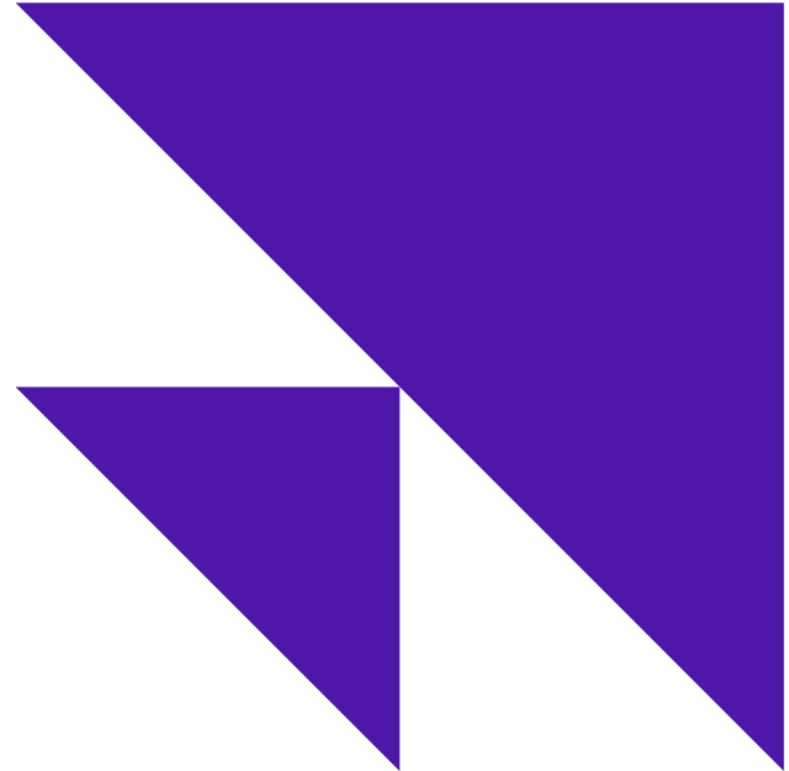
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## Good Data Quality Company Progression



# Good Data Quality Company Progression

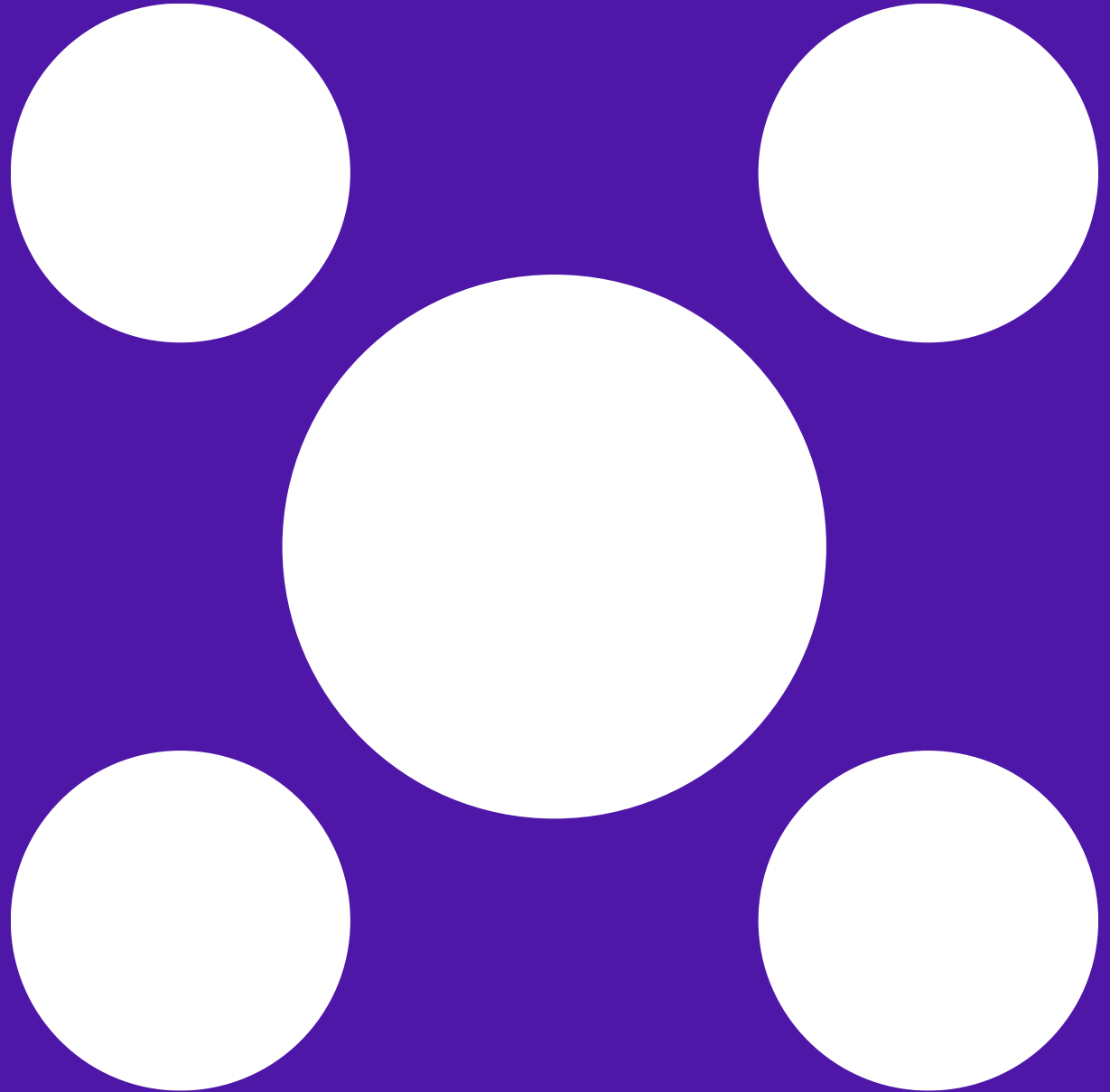
- Natural Company Progression Resulting From Good Data Quality
  - Using Customer Data As The Example
    - Understanding Your Customers
    - Allows You To Focus On Customers
      - And Proactively Engage With Customers
    - Provides Better Analytics
      - Better Strategic Decision Capability
      - Adjust Your Company Accordingly (Steer The Ship)



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## Data Governance Helps Data Quality



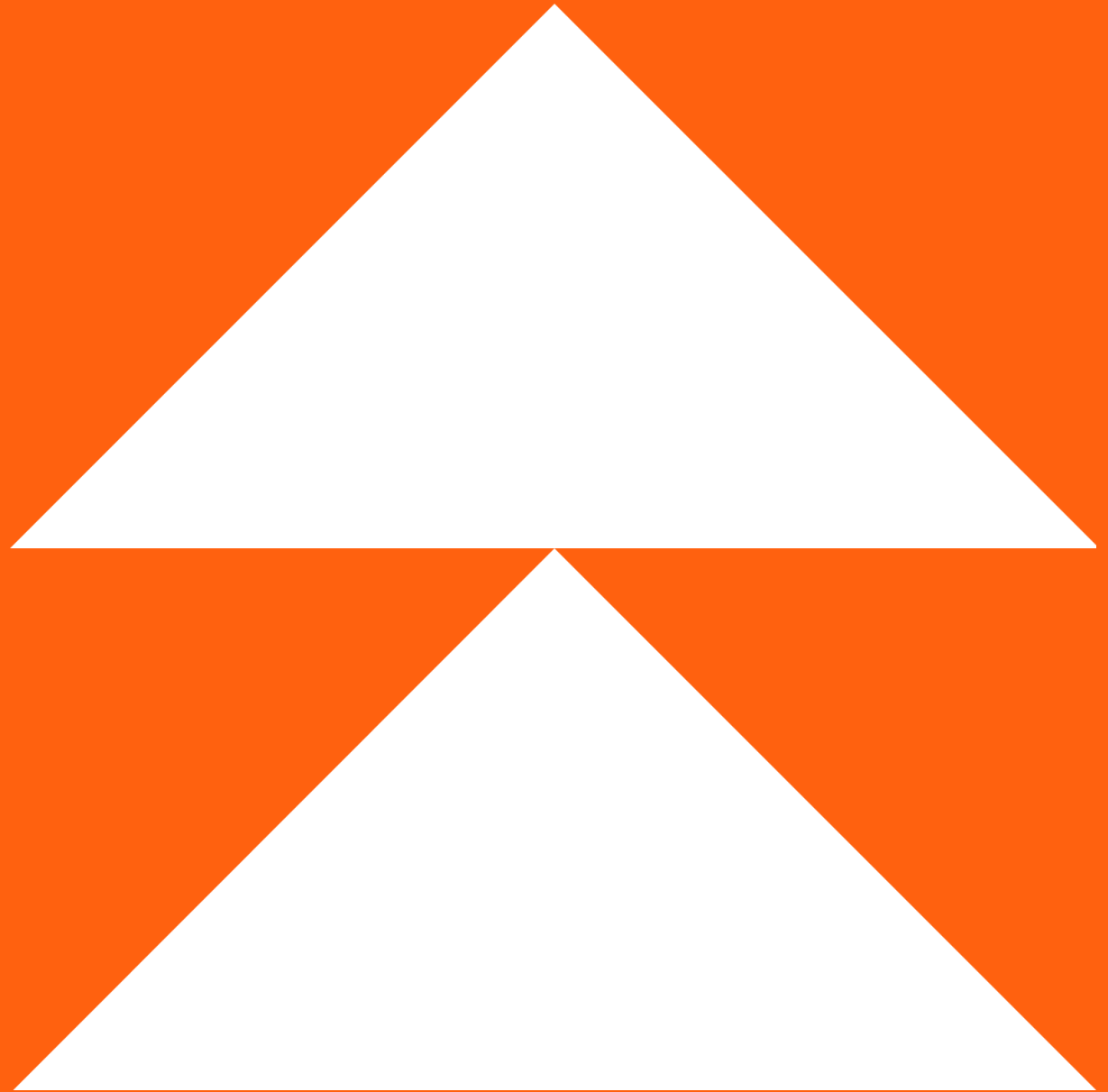
# Data Governance Helps Data Quality

- What Naturally Results From Governance?
  - Governance => Good Data Quality => Company Asset
- Without Governance?
  - No Governance => Poor Data Quality => Company Liability

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## Business Objectives





# Business Objectives

- What Are Your Business Objectives Using Data?
  - Meet With Leadership
    - CEO, Executive Team, Department Heads, Etc.
  - Document Objectives From Leadership Teams

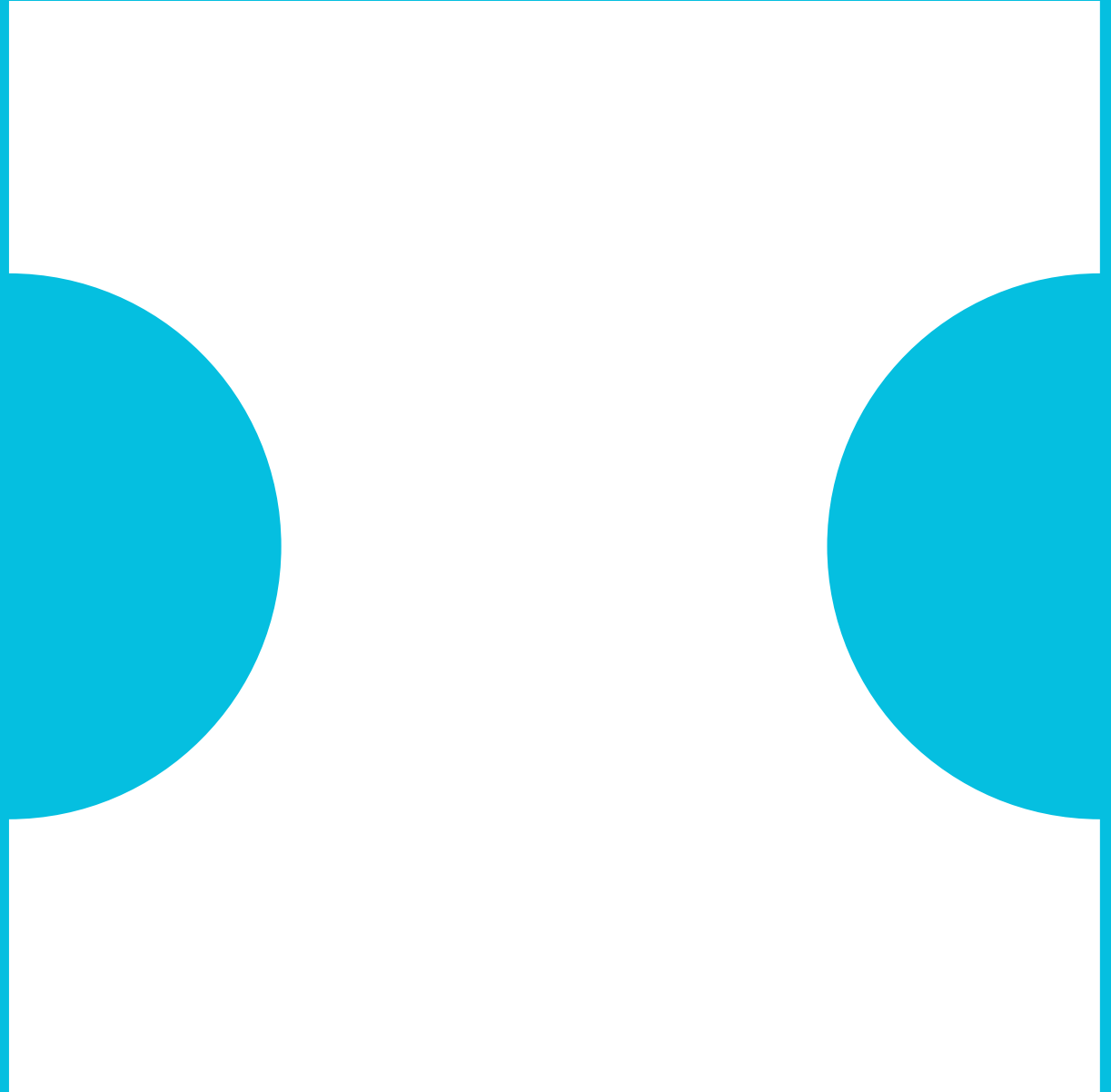
## Data Governance Plan



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## Data Usage – Who Is Using The Data?



# Data Usage – Who Is Using The Data?

- Discover Who Is Using The Data
  - Shadowing
  - Meet With Different Departments / Groups
  - Surveys
  - Create Reports
    - Who Created Data
    - Who Last Modified Data
    - How Often Each Person Modifies Data
    - How Often Each Person Views Data
    - Where Each Person Is Modifying Data

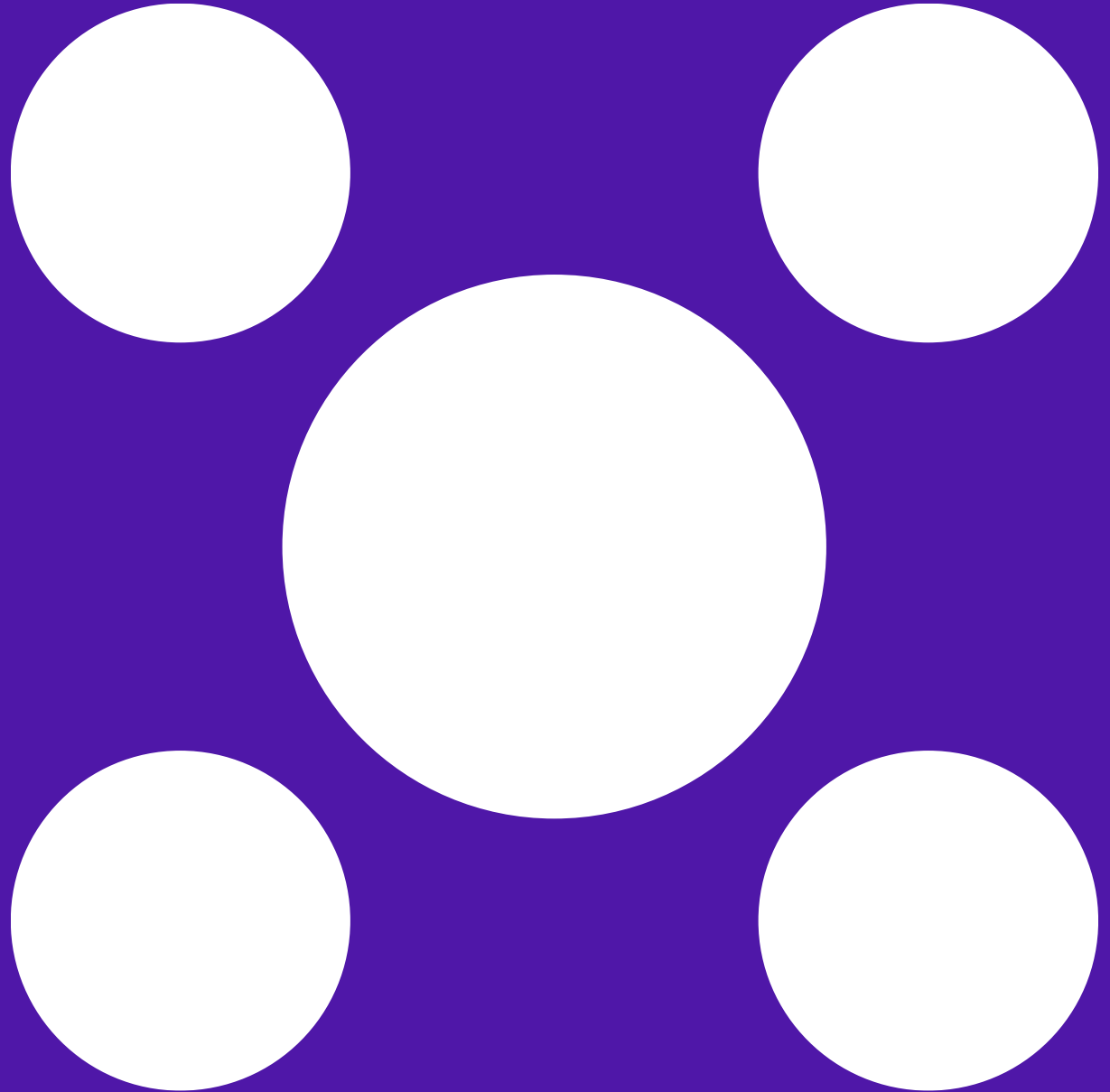
## Data Governance Plan



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## Data Usage – How Is The Data Being Used?



# Data Usage – How Is The Data Being Used?

- Discover How Data Is Being Used
  - Leverage Same Shadowing Sessions
  - Leverage Same Meetings With Different Departments / Groups
  - Leverage Same Surveys
  - Sample Discussion Topics
    - Define Daily Work Processes For Each User/Role
    - Importance Of Data For Each User/Role
    - Pain Points
    - Specifics Of How Their Data Is Being Used (Example On Next Slide)

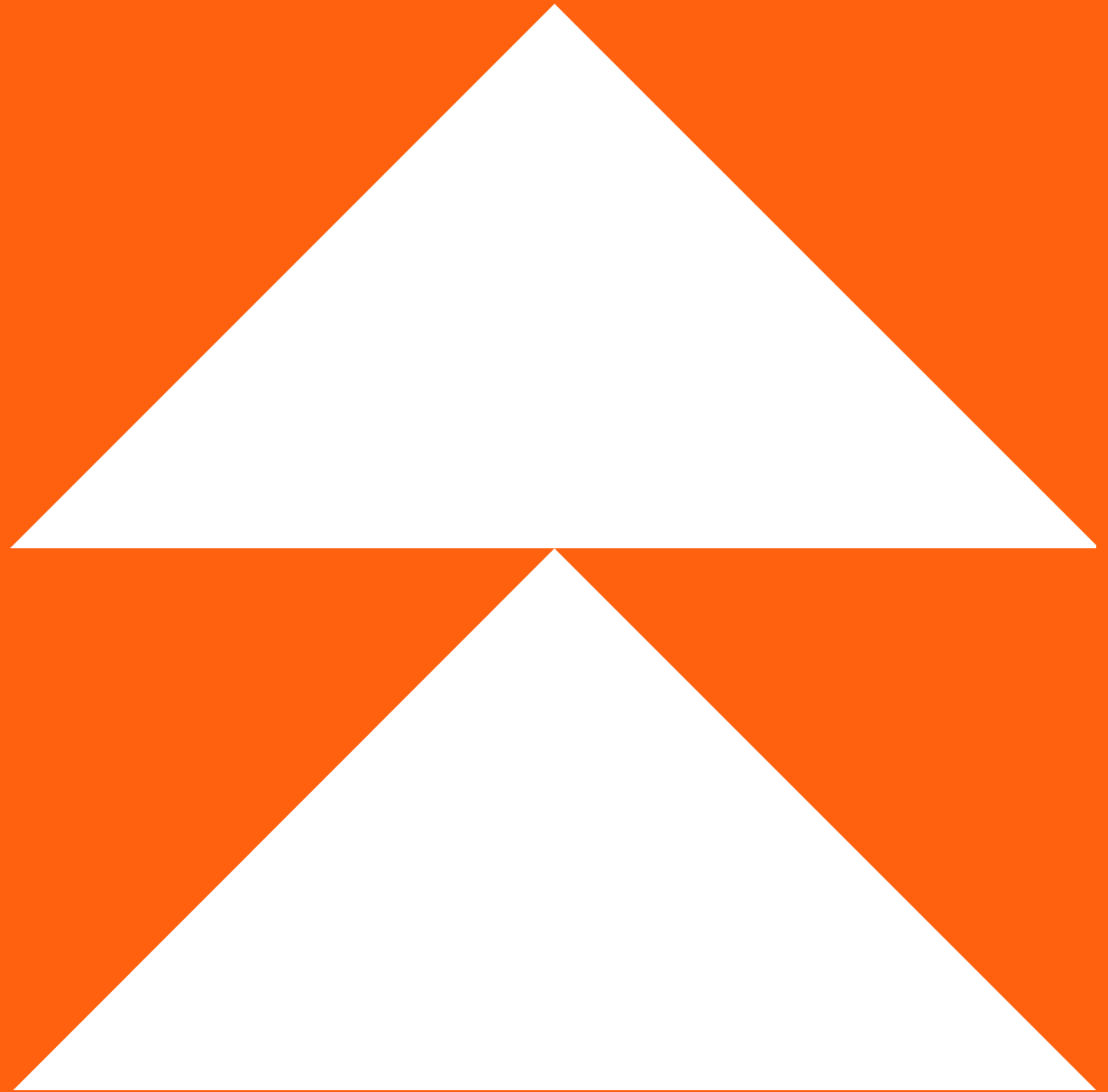
## Data Governance Plan



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## Required Data Points



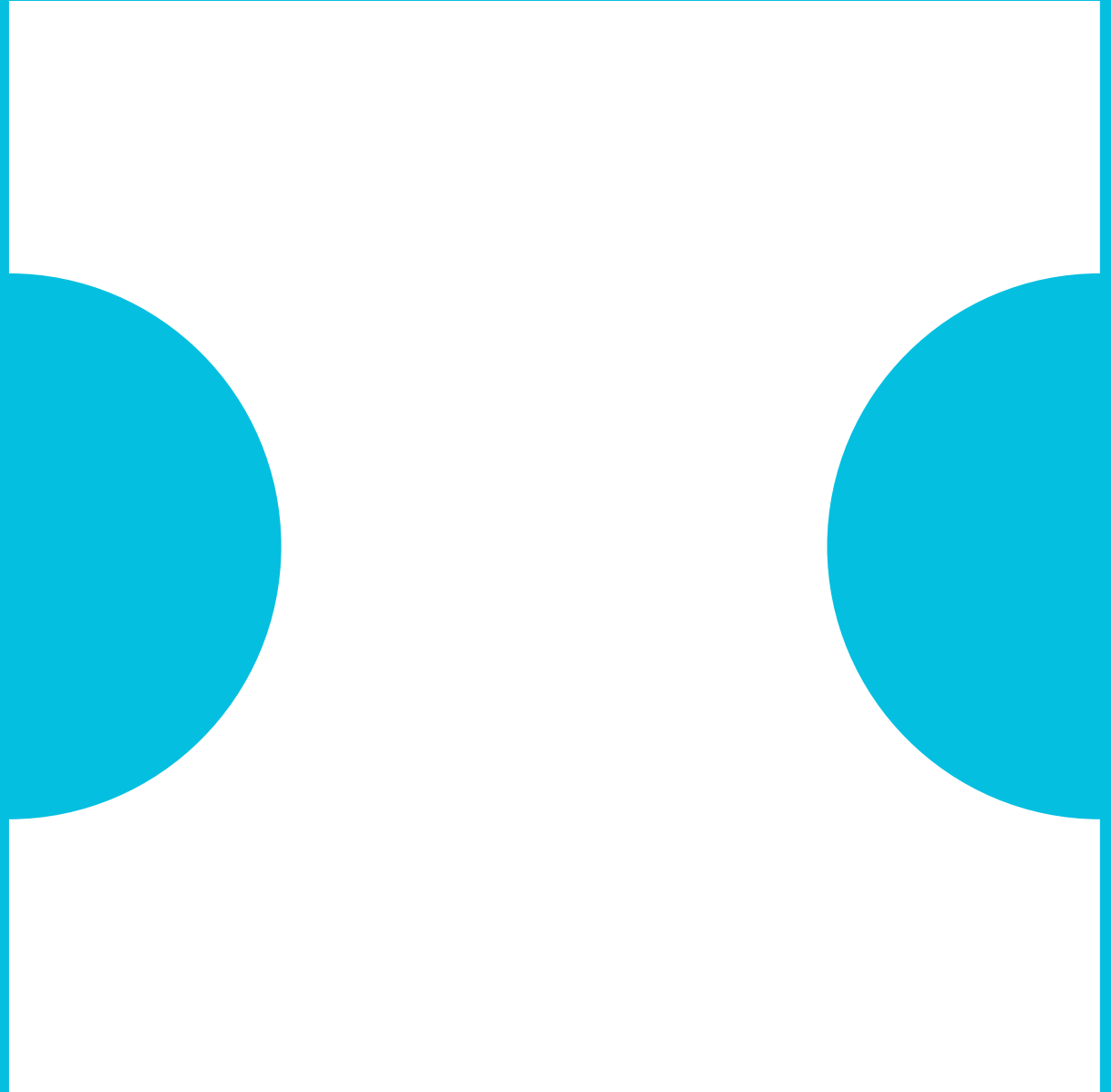
# Required Data Points

Business Objective	Department(s)	Required Data Points
Advertise Products	Marketing	Name, Company, Address, Email, Phone, Fax, Industry Type, Years In Business, Number of Employees, Annual Revenue
Analyze Campaigns	Marketing, Sales	Owner, Status, Campaign Source, Campaign Start Date, Campaign End Date, Last Touched Date, Prospect Name, Company, Address, Email, Phone, Fax, Industry Type, Years In Business, Number of Employees, Annual Revenue
Analyze Support Requests	Customer Support, Sales, Legal, QA/RA	Name, Company, Address, Email, Phone, Fax, Request Type, Priority, Number of Escalations, SLA Status, Request Origin
Cross-sell / Upsell Opportunities	Sales, Marketing	Company, Products Owned, Industry Type, Number of Employees, Annual Revenue
Invoice Customers	Customer Support, Sales, Legal, Finance	Name, Company, Email, Address, Phone, Products Owned
Marketing Blast	Marketing	Name, Company, Address, Email, Products Owned
Recall Communication	Customer Support, Legal	Name, Company, Address, Email, Products Owned

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## Analytics





# Analytics

- Analyze Data Usage
  - Data Paths For Each “Required Data Point”
    - Where Does Data Go?
      - Manually Entered?
      - Interfaced?
      - AI Generated?
  - What Do Users Use The Data Points For?
    - Automated Analytic Tools?
    - Manual Excel Downloads?
    - What Decisions Are Driven From The Data Points?
  - Most Complete Fields (Number And Percentage)
    - 0 Of 5 Or 5 Of 5 Might Not Be Significant
    - 1 Million Of 2 Million?
      - 1 Million Could Indicate Field Was Or Still Is Important
        - Question The Business

## Data Governance Plan



# Analytics - Continued

- Analyze Data Usage - Continued
  - Most New Records
  - Most Modified Fields
    - Most Complete, New And Modified Helps Tell The Current Story Of What Data Is Being Used
  - How Old?
  - Last Used In Reports & Applications
  - Duplicate Identification
  - Correct / Incorrect Data
    - Compare With Trusted Data Sources

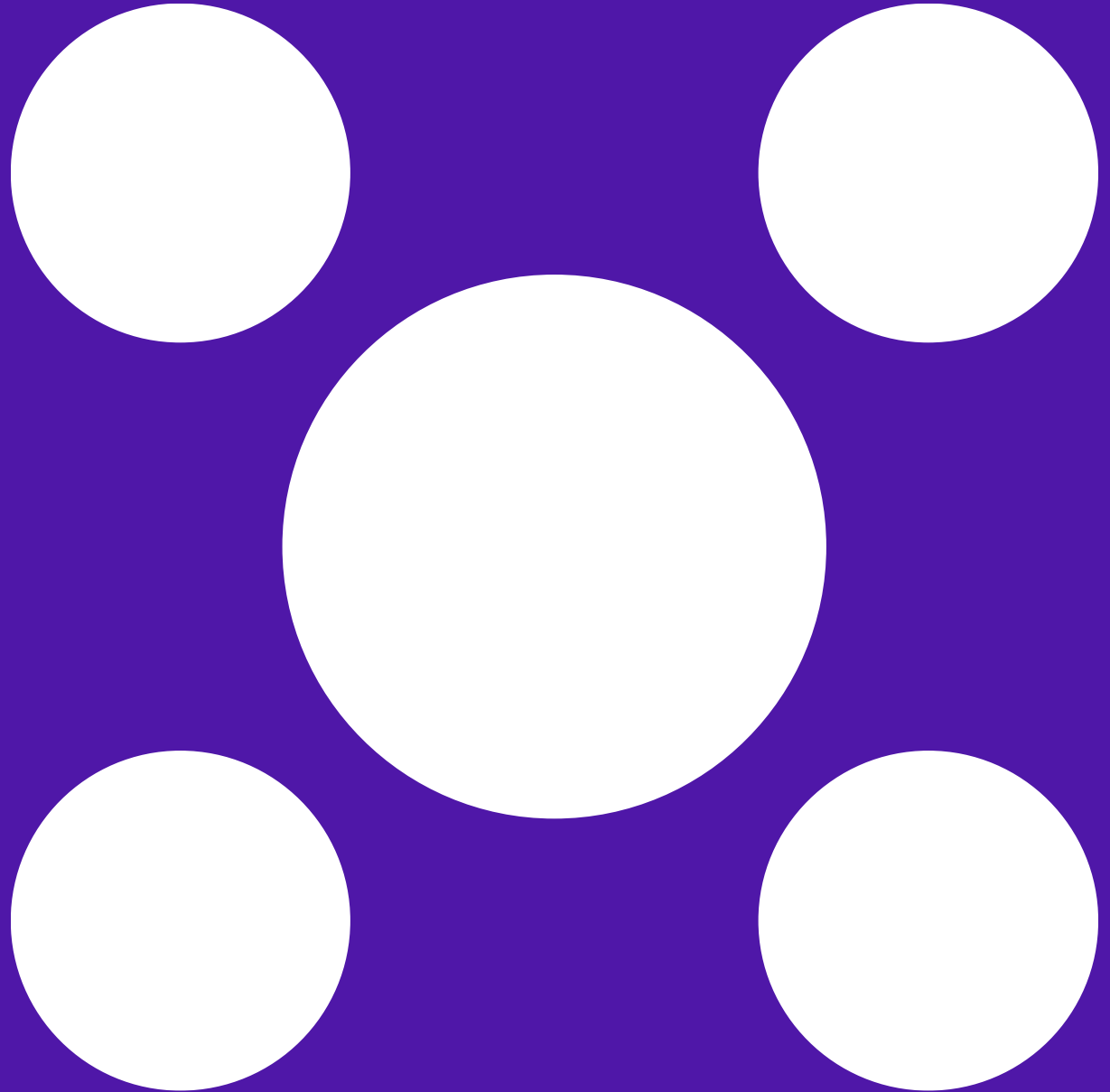
## Data Governance Plan



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## Developing Governance Plan



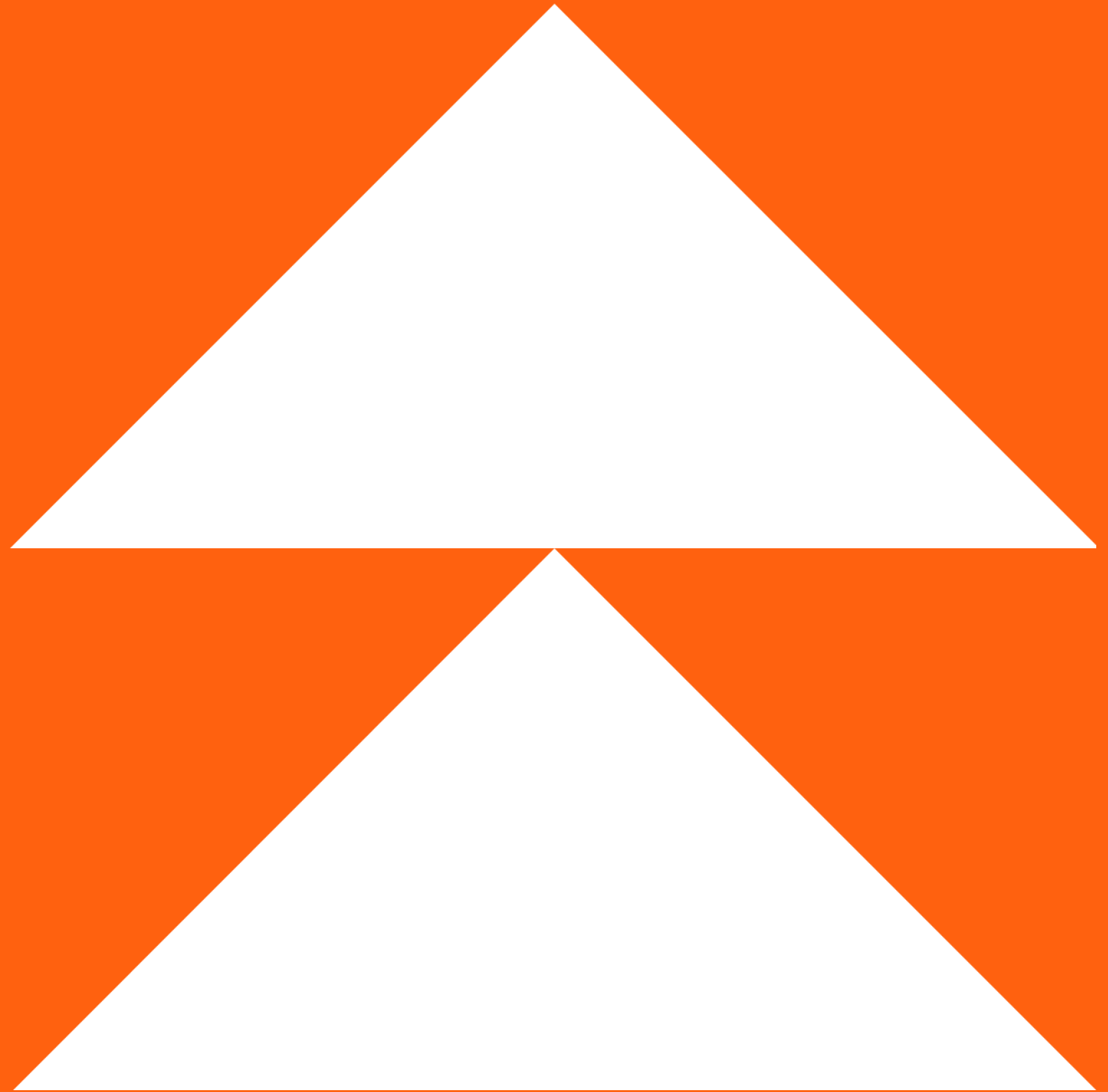
# Developing Governance Plan

- Key Balance
  - Good Protocols / Processes
  - Flexibility
    - Conflict (Protocols/Processes Vs Flexibility)?
      - On The Surface, Yes. But There Is A Solution
        - » Require Both. Both Being Structure And Flexibility
      - Every Company And Every Hour Within A Company Can Require Different/Changing Requirements
      - Data Governance Is One Required Puzzle Piece
- Resulting With
  - Data Standards & Good Quality
  - User Empowerment
  - Users' Sense Of Ownership

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## Developing Governance Plan



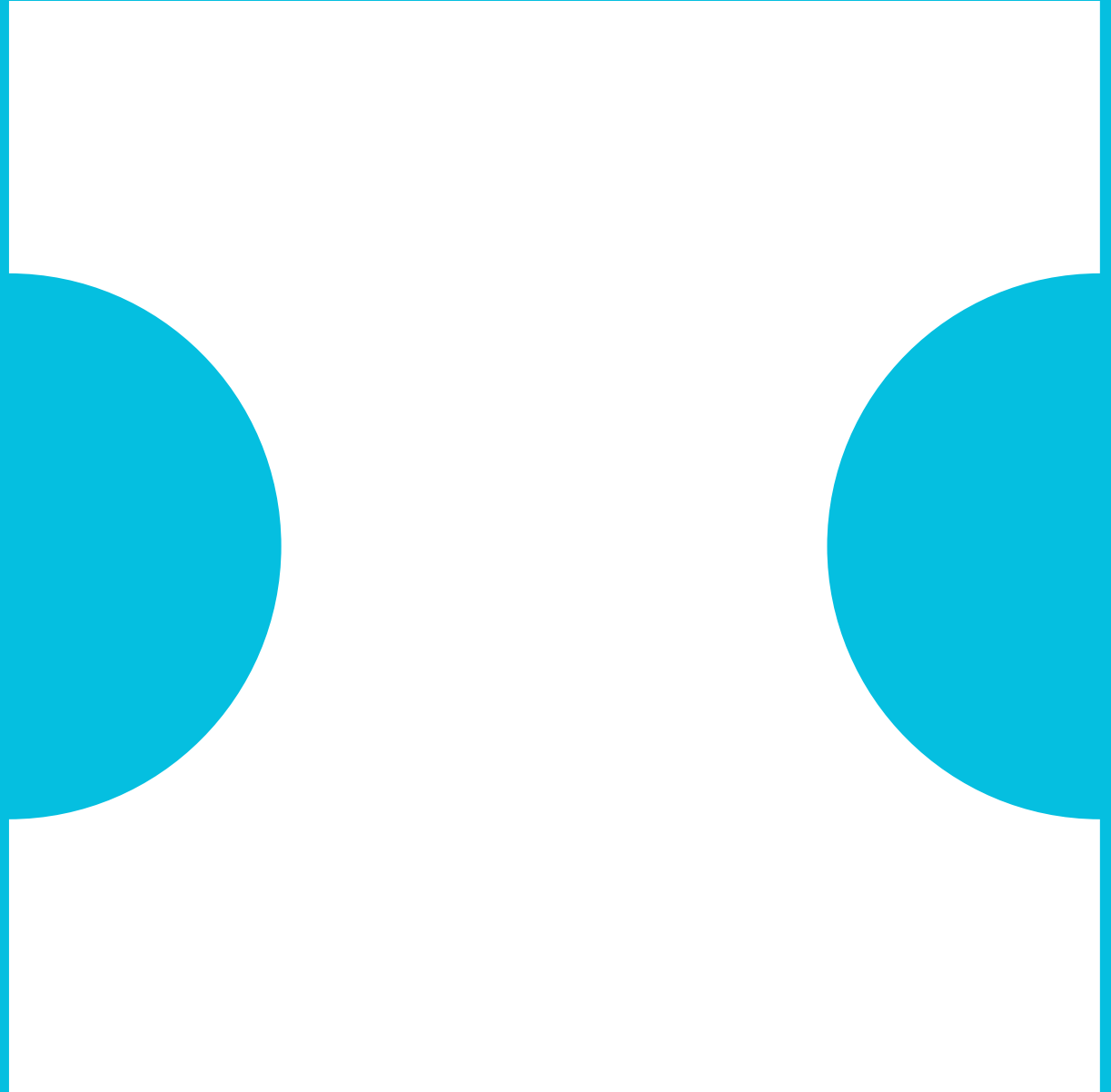
# Developing Governance Plan - Continued

- Define Your Data
  - Naming Standards
  - Data Types
    - Master
    - Reference / Reporting / Analytics
    - Transactional
  - Required vs Optional Data
  - How Data Is Collected
  - Data Verification Process
  - Define Data Phases For Life Of Data

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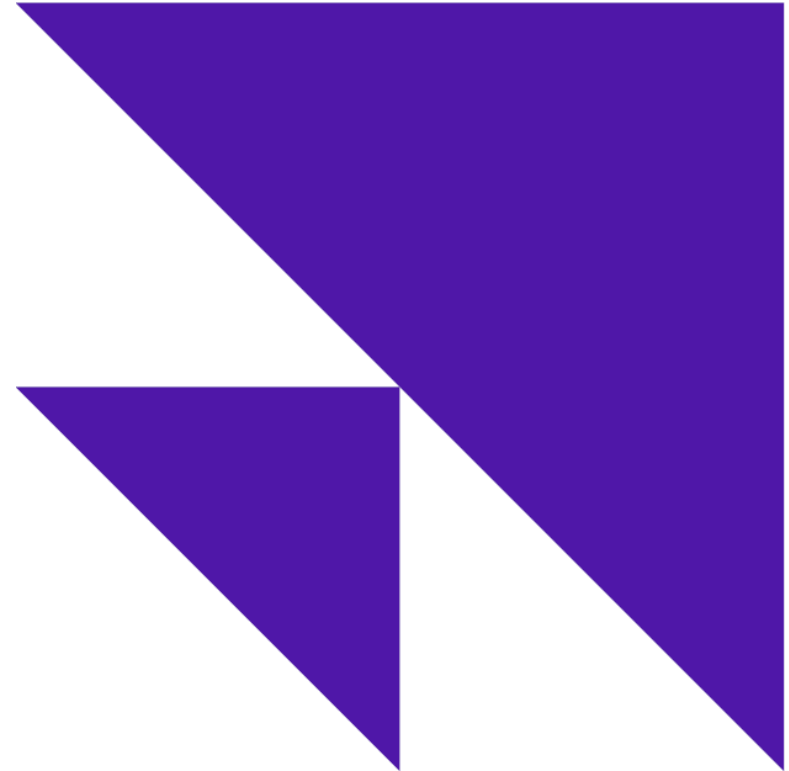
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## Developing Governance Plan



# Developing Governance Plan - Continued

- Define Your Quality Standards
  - Develop Data Measurements
    - Use Measurements From Analytics (Analyze Data Usage) Slides
  - Enhance Applications To Include Data Measurements
    - Helps Users Adhere To Quality Standards

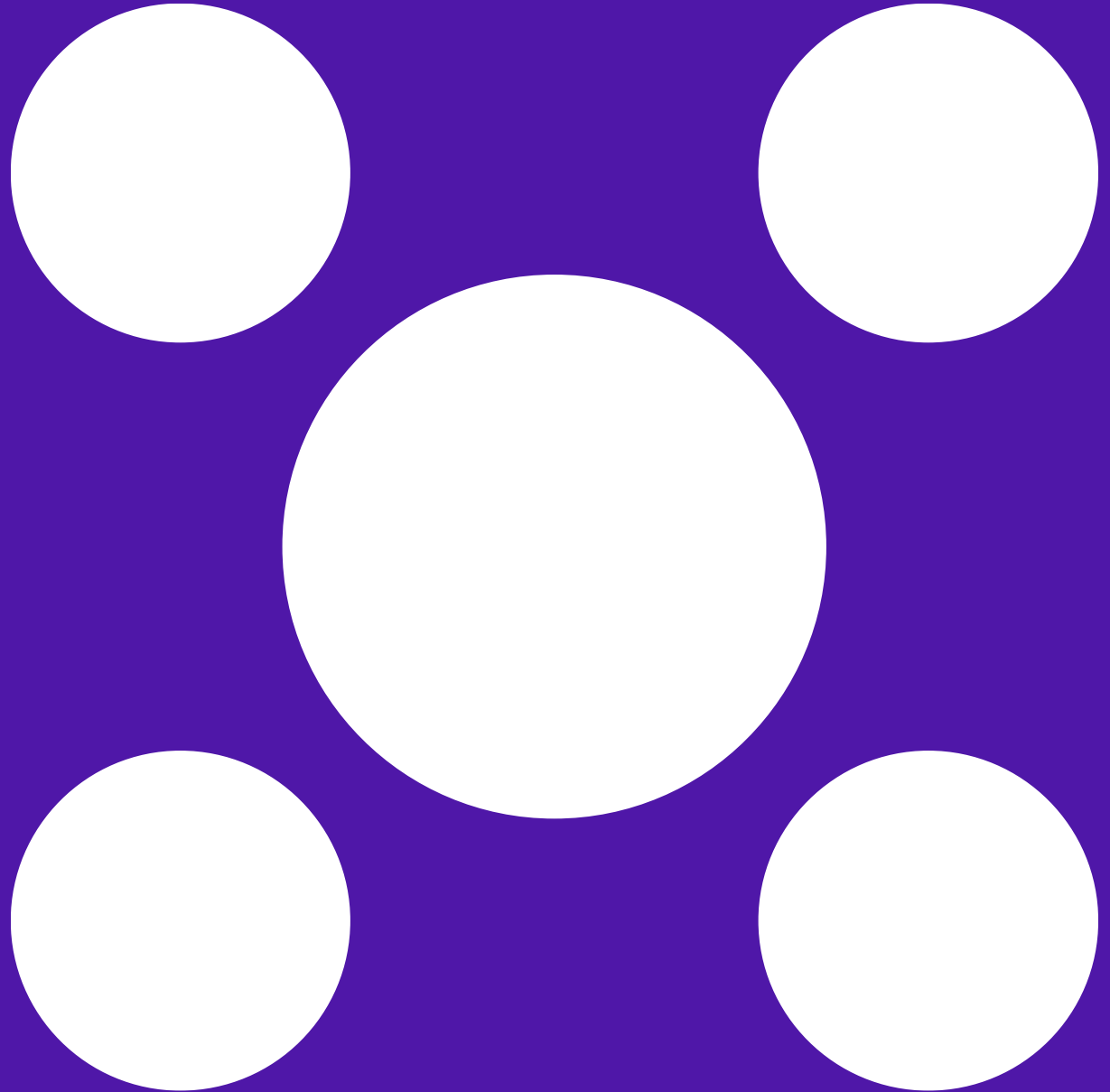




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## Developing Governance Plan



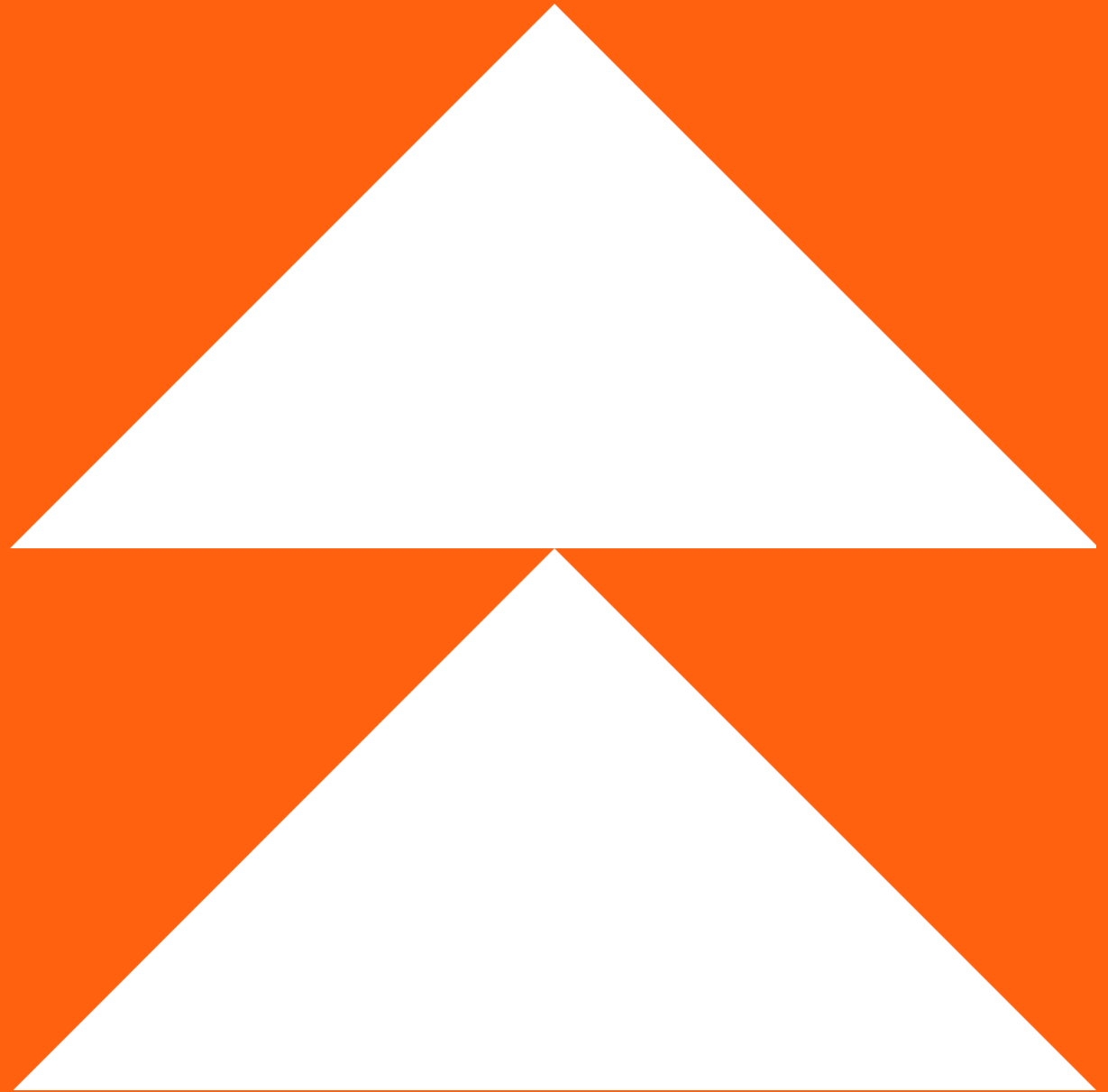
# Developing Governance Plan - Continued

- Governance Vs Guardianship
  - Governance
    - Establish Rules & Policies
      - Which Define Processes & Protocols
  - Guardianship
    - Roles Enable Data Quality Activities
      - Which Helps Ensure Governance Compliance

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## Developing Governance Plan – Governance



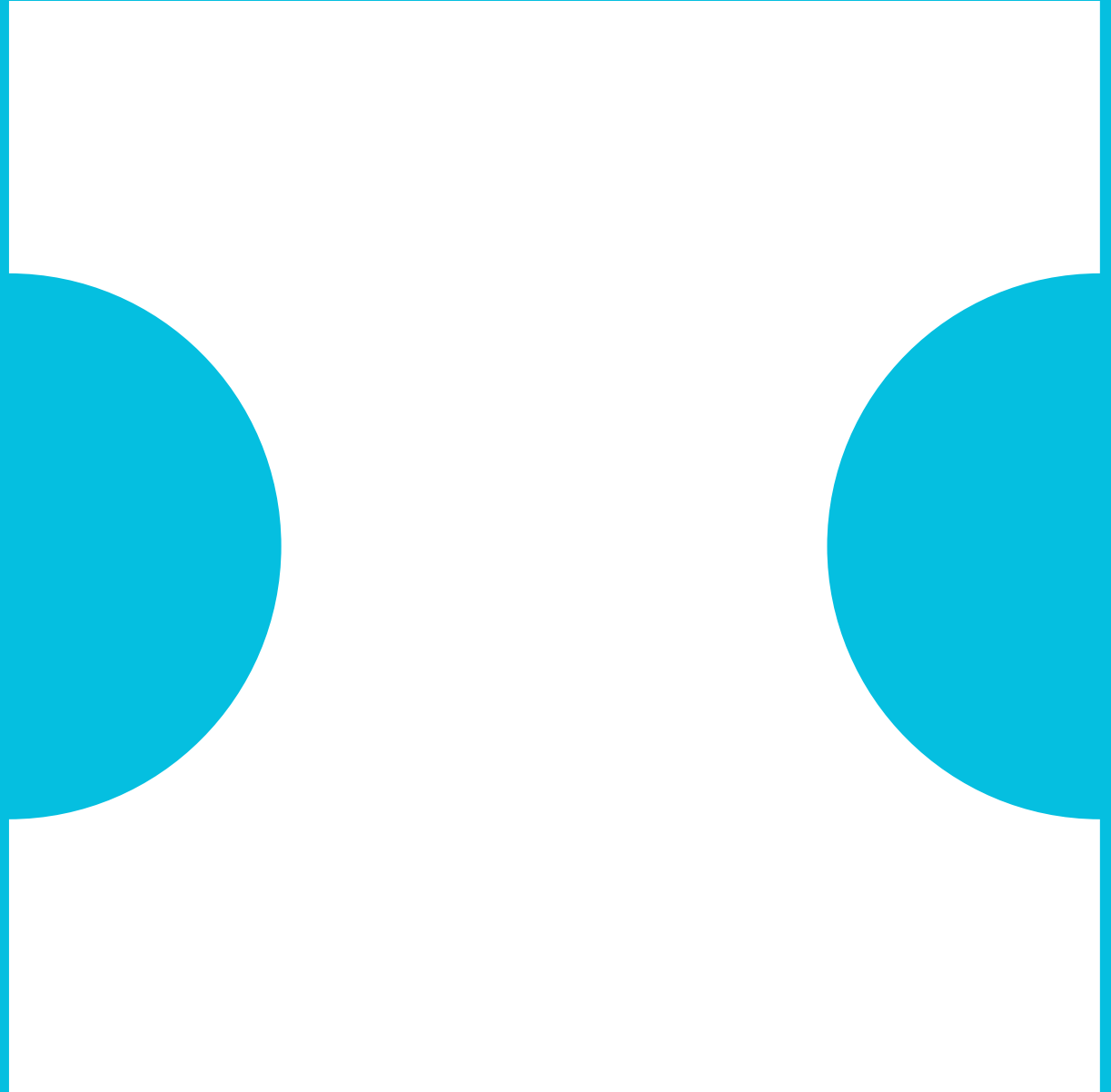
# Developing Governance Plan - Governance

- Clearly Appoint Roles
- Clearly Define How Roles Shall Be Held Responsible
  - Can Use RACI or anything that works
    - Responsible
    - Accountable
    - Consulted
    - Informed
  - Do This Down To The Data Level
  - Be Consistent
  - Roles Not Always Equal To Company Job Titles
    - Roles Can Be Reassigned
    - Resources Can Be Assigned Multiple Data Governance Roles
    - New Roles Can Be Created
    - Roles Can Be Eliminated Or Altered

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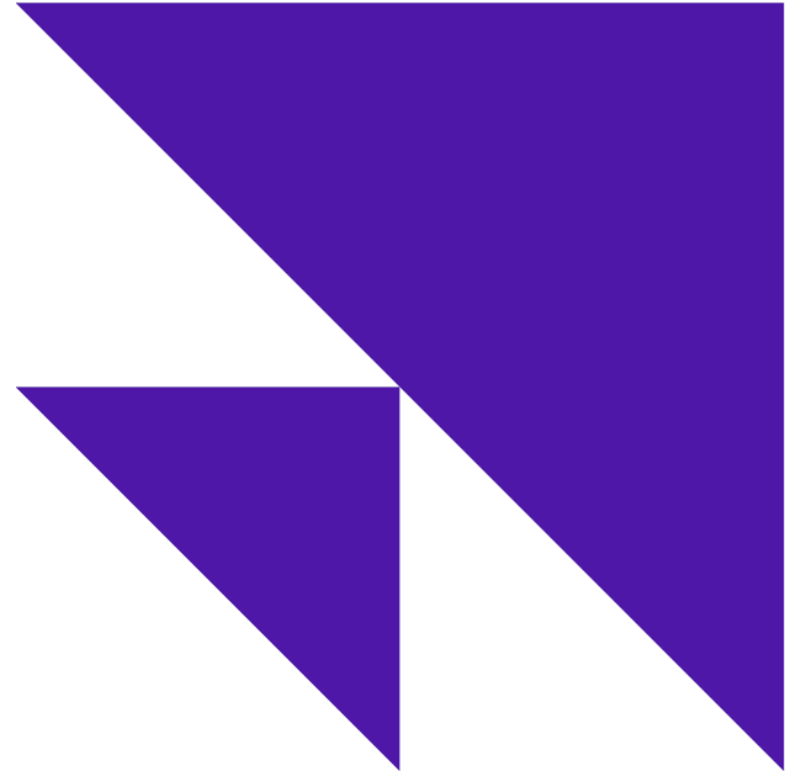
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## Developing Governance Plan – Governance



# Developing Governance Plan - Governance

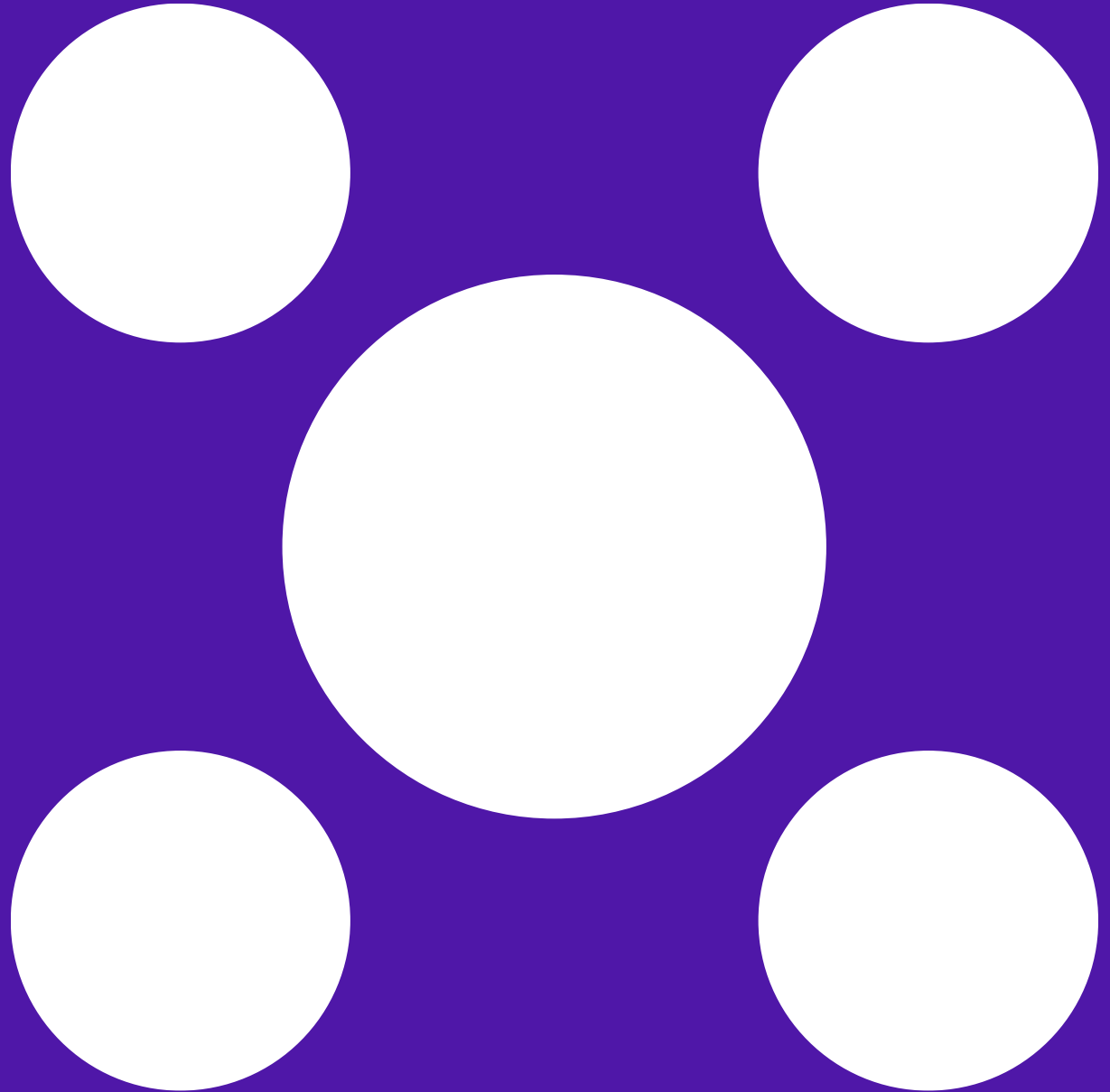
- Data Security
  - Determine Field Security
    - Create
    - Read
    - Update
    - Delete
    - Archive
    - Unarchive
    - PCI-DSS (Payment Card Industry Data Security Standard)
  - Confirm Fulfillment Of Data Security For:
    - Legal Obligations
    - Contract Obligations
    - Regulatory Affairs Requirements



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## Developing Governance Plan – Guardianship



# Developing Governance Plan - Guardianship

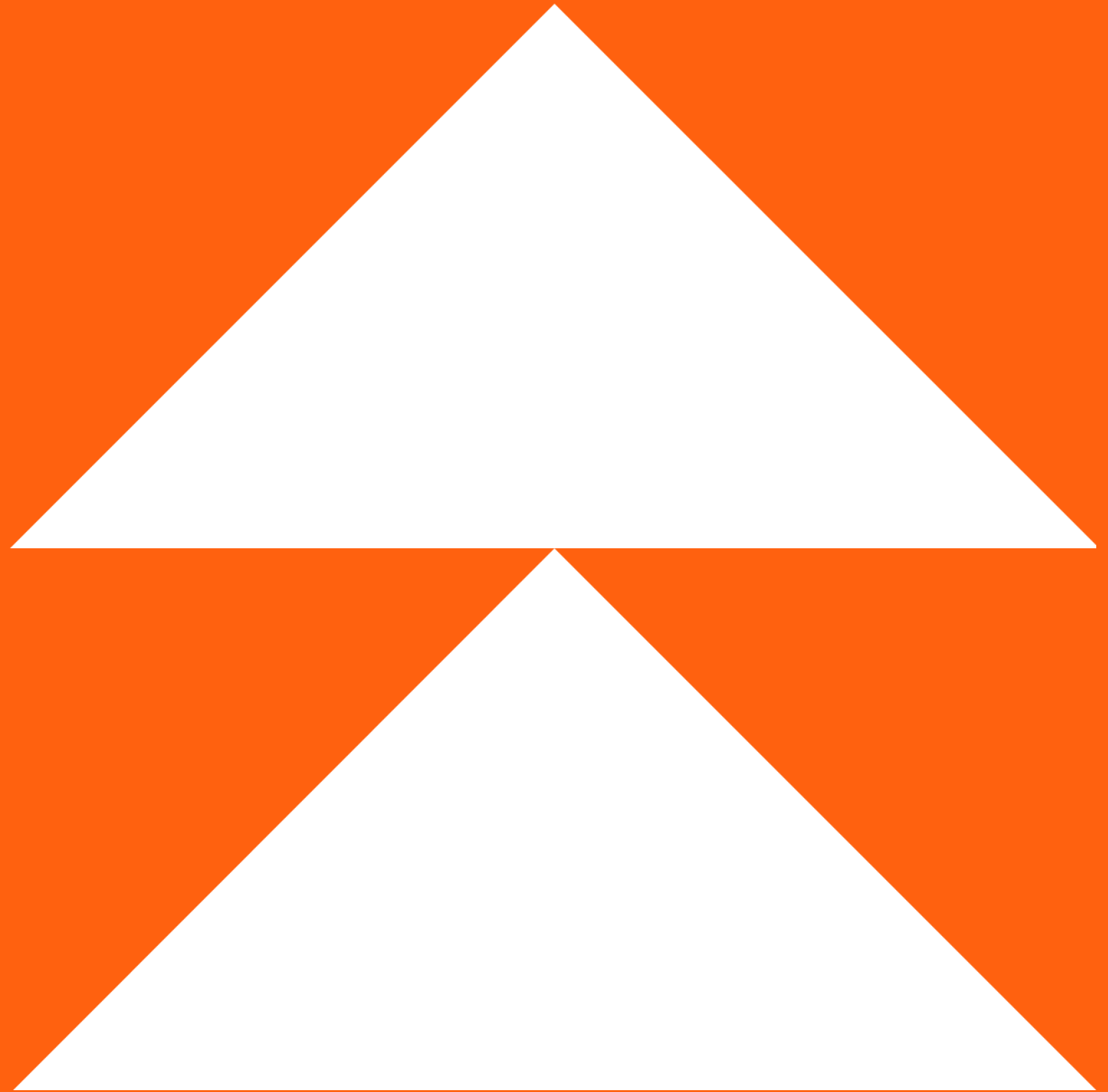
- Allot Time For Guardianship Responsibilities
- Develop Quality Control Processes For Guardianship
  - Data Security Processes
    - How Data Is Created?
    - How Data Is Verified?
    - How Data Is Cleaned?
      - Archiving
      - Deduping / Merging
      - Updating
      - Deleting
      - Add Missing Data
      - Cleansing Frequency
  - Data Retention Processes
    - Retention Duration
      - Often Different For Different Data
    - Archiving
- All Guardianship Responsibilities & Processes Supported By Data Quality Measurements (Shown At Previous Presentation)
  - Graphical Dashboards Are Often Most Effective



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## Developing Governance Plan – Implementation



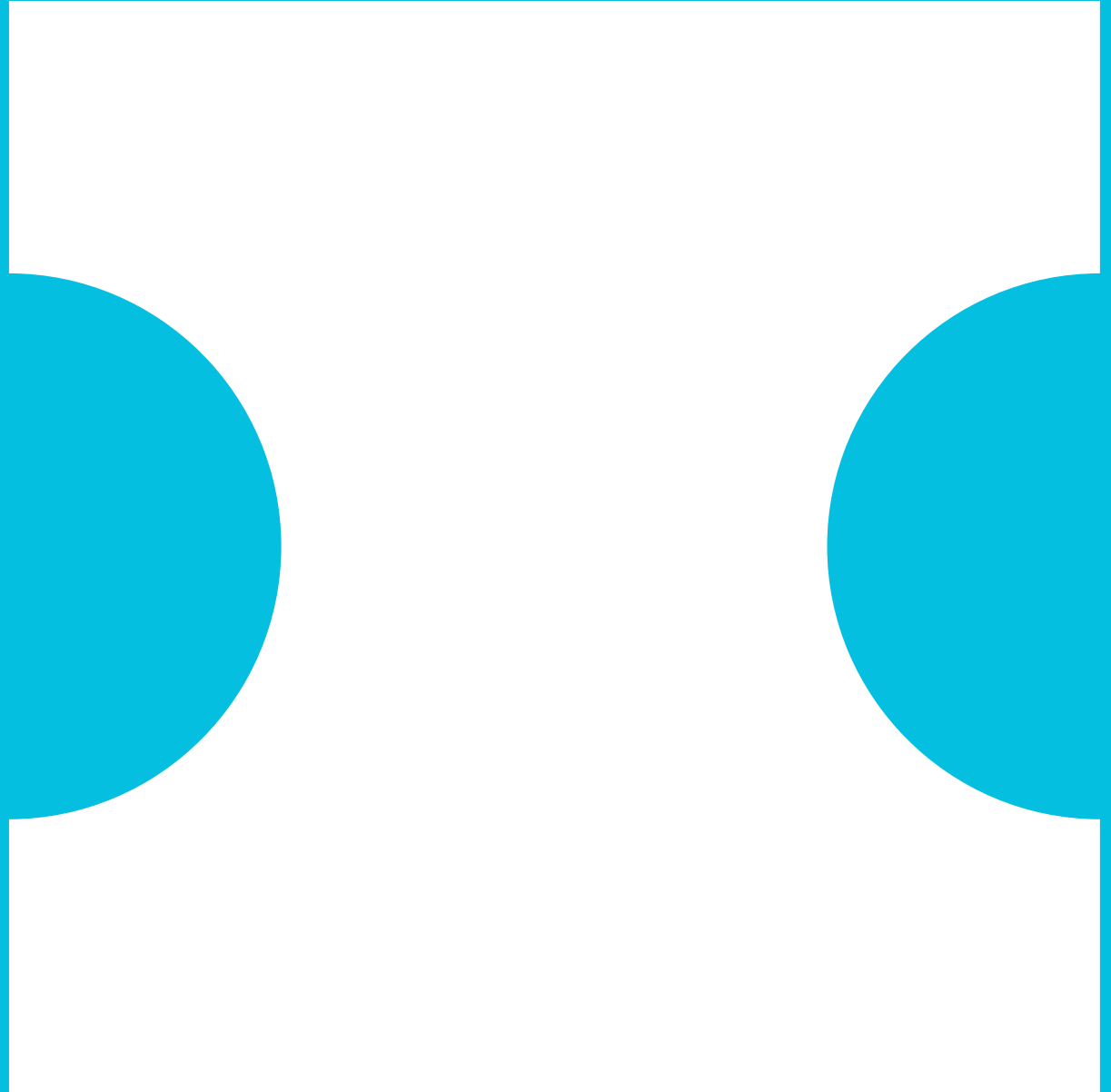
# Developing Governance Plan – Implementation

- With Completed Governance Plan
  - Time To Implement
    - Assign Guardians
    - Deploy Policies
    - Market / Promote / Stress Importance Of Policies
    - Continuous Follow Up / Oversight & Improvements

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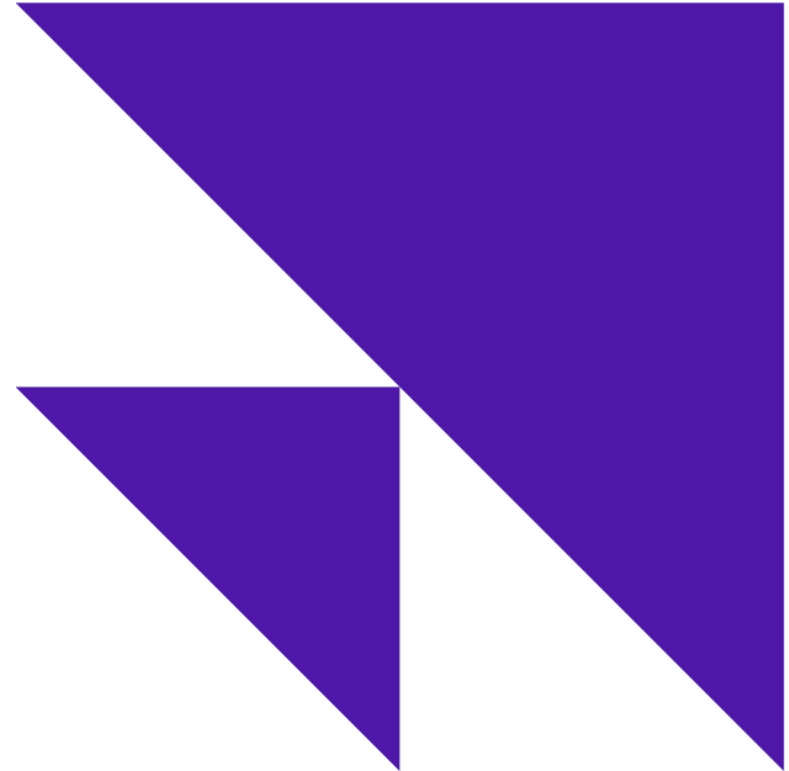
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## Developing Governance Plan – Implementation



# Developing Governance Plan – Implementation

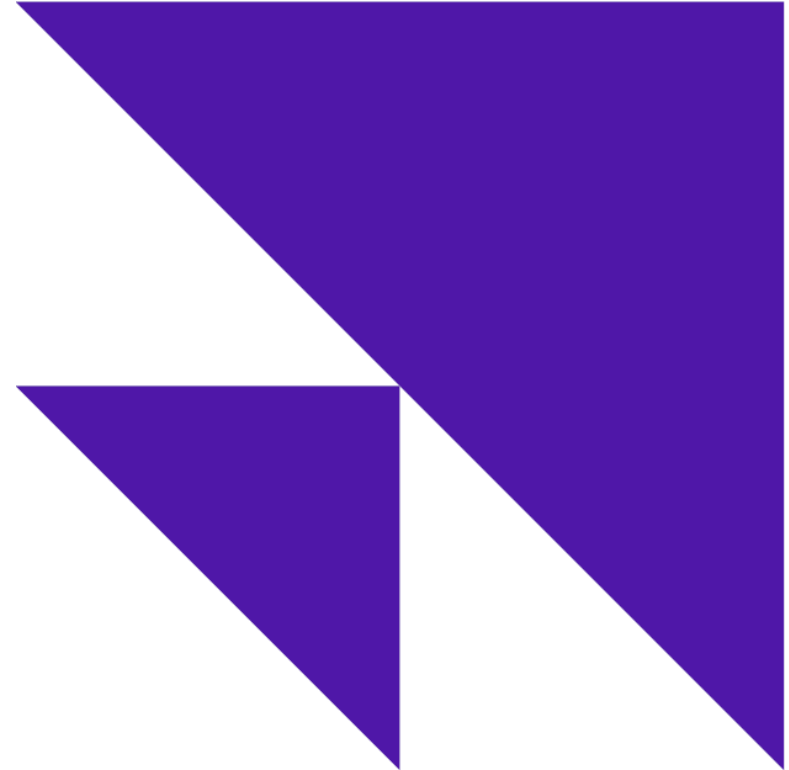
- Keys For Success
  - Easy & Fun UI
    - Cursor Jumps To Appropriate Field
    - Automate Data Entry When Possible
      - Faster Data Entry
      - Less Errors = Better Quality
    - Avoid Freeform Fields When Possible
      - Pull Down Fields
      - Lookup Fields
      - Etc.
    - Show Data Quality Measurements
      - Important To Show Data Value
      - Small Animated gifs Or Images Are Fun & Powerful
        - » Simple Example: Thumbs Up / Down Or Stop Light
        - » Advanced Example: Color Changing Pie Chart With Quality Percentage



# Developing Governance Plan – Implementation

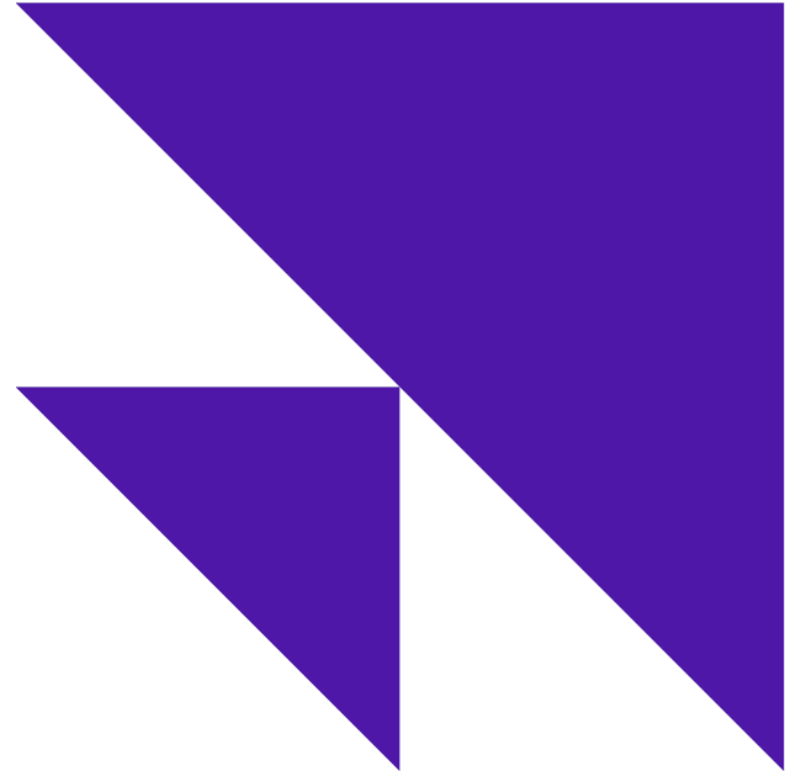
- Keys For Success - Continued

- Data Goals
  - Create Goals That Are
    - Achievable
    - Trackable
- Research Data Providers
  - Some Data Such As Customer Demographics Can Often Be Purchased
- Set Up Regularly Scheduled Data Cleansings
  - Conform Data To Standards
    - Ex: Phone Number Formatting
    - Ex: Use Of Abbreviations (Saint Joseph Hospital vs St Joseph Hospital vs St. Joseph Hospital)
    - Conformity Allows For Much Better Data Searching
  - Deduping
    - Reduce Deduping Needs By Implementing Preventative Solutions
      - » Ex: During Record Addition, Automatically Search For Duplicates & Warn User If Any Are Found
  - Populate Missing Data
    - Use Data Quality Measurements
      - » Typically Drill Into Data From Dashboards
    - Use Tools To Compare With Trusted Data Sources



# Developing Governance Plan – Implementation

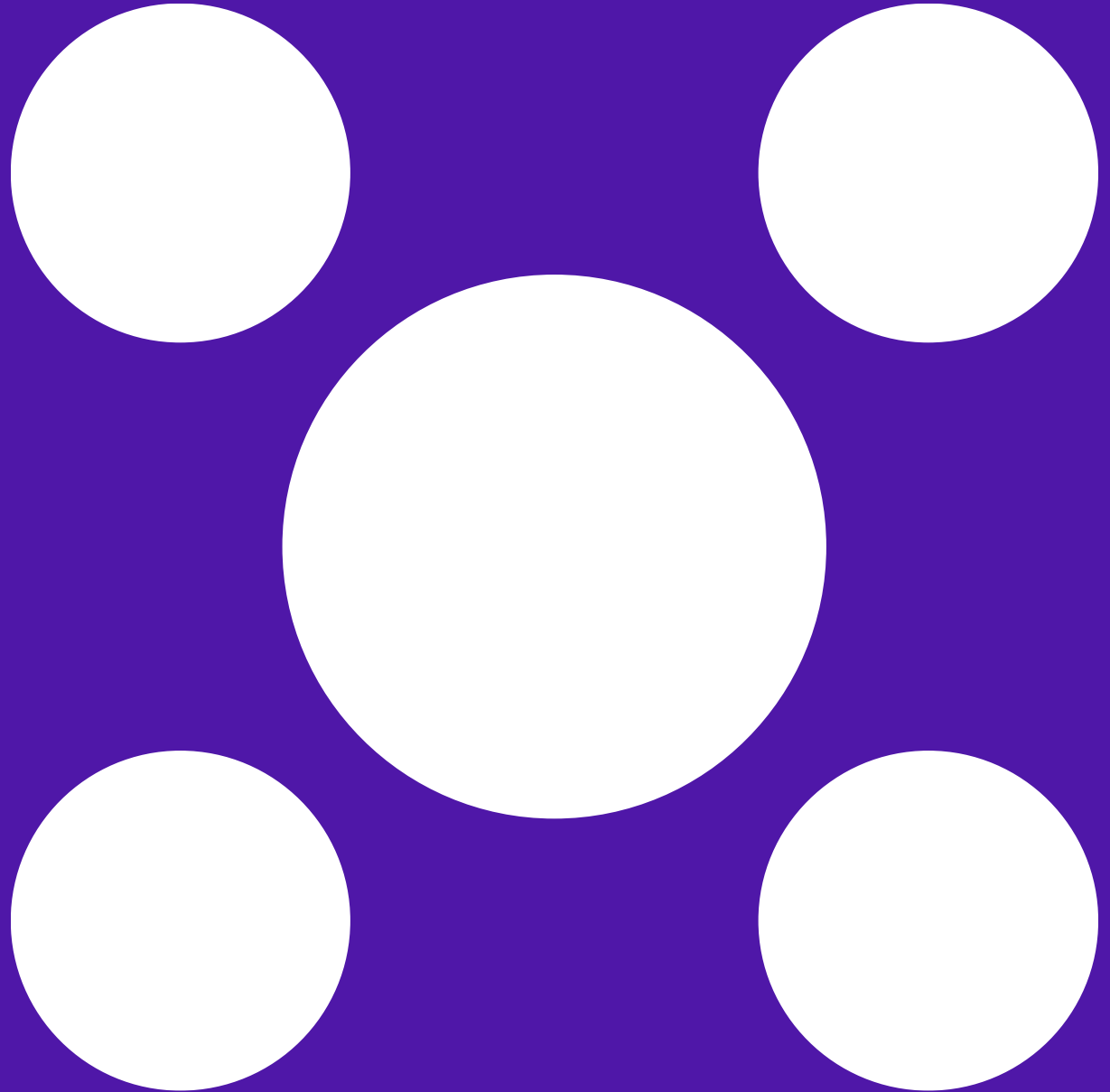
- Keys For Success - Continued
  - Flexibility
    - Data Entry / Maintenance Needs To Be Easy And Quick
      - Otherwise Leads To User Frustration
        - » Which Leads To Incomplete & Incorrect Data
    - Agility - Allow For Quick Business Process Changes
      - Invest In Technology
    - Regularly Scheduled Meetings To Review Governance Plan



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## Guardianship Responsibility Sharing & Understanding



# Guardianship Responsibility Sharing & Understanding

- Direct Responsibility
  - Guardianship Roles
- Direct Understanding
  - Positions Using Good Quality Data
- Indirect Understanding
  - All Others Benefiting From Company Success





# Guardianship Responsibility Sharing & Understanding

- How To Instill Guardianship Responsibility Sharing & Understanding?
  - Showoff How Data Governance Led Directly To Increased Productivity, Customer Satisfaction, Increased Sales, Etc.
    - Quarterly Town Hall Meetings, Etc.
  - Set Benchmarks To Meet
    - Feature Data Quality Measurement Dashboards On Intranet To Show Benchmarks Met (Or Not Met)
    - Tie Performance Reviews To Meeting Benchmarks
  - Assign Data Quality Champions
    - At Each Site
    - Each Department
    - Each Team
    - Etc. Whatever Provides Best Coverage

Volunteer to present at a future  
Lunch & Learn!

SEE YOU  
NEXT  
MONTH!

When registering on-line, please be sure  
to enter **PMI Member ID**  
Not PMP Certificate #, not PMIW website  
log-in ID!

(Saves the volunteers from tracking it down!)

Attendees of virtual events (like this one) need  
to claim own PDUs.

e-Mail with details will be sent after the  
meeting

Volunteers are needed to present (L&L's  
*and* BR's)

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