

**This Webinar will be starting
momentarily**

**Please post any questions throughout
the presentation using chat**

**Note: All participant microphones
are muted.**

THANK YOU FOR ATTENDING!

*Data
Governance
Playbook
Webinar Series*

Session #3:

Driving Business Value through Data Governance

From Storyboards to Dashboards

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Agenda

- 1** | Housekeeping & Introductions
- 2** | DG: a Quick Review
- 3** | Challenges Achieving Business Value through DG
- 4** | DG Storyboards to Dashboards: an Example
- 5** | Q&A and Close-out

Section 1: Housekeeping & Zoom Overview

- As a Zoom attendee, your webcam and microphone will not be activated so that we can cover the material in the allotted time
- There will be an opportunity to pose questions through the Zoom chat function:
 - The Chat Box allows you to send messages to everyone or just the presenters
 - The Q&A Box allows you to pose questions - using your name or anonymously
- We encourage participants to post questions throughout the presentation

Of note:

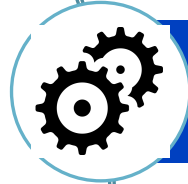
- This session will be recorded but your participation is anonymous
- The slide deck will be available upon request
- The recording will be posted to our website (www.DataGovernix.com)



*“Let’s take this
Data-Driven
journey
together.”*



Founded in 1995 and based out of Ottawa, ON, Canada



Specializing in Data Strategy, Data Governance, & Data Management



Delivered hundreds of data initiatives across Canada, US, and South America



Expertise in Public Sector, Banking, Insurance, and Oil & Energy Sectors

About the Presenters



Graham Smith: CEO/Founder & Chief Data Strategist

- Over 30 years experience in Data Management Industry
- Trusted Advisor, Educator, and Mentor
- Undertaken hundreds of data initiatives for both public and private sector clients
- Previously worked for KPMG LLP and IBM Canada

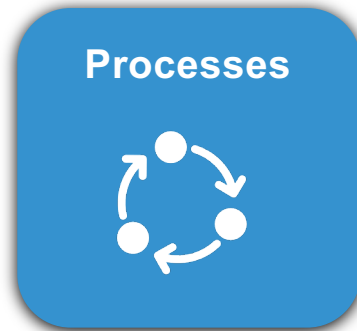


Alex Fourie: Data Governance Specialist

- Over 10 years experience in Data Management Industry
- Undertaken numerous Data Governance and Data Management engagements for public and private sector clients
- Previously worked for Deloitte LLP

Section 2: DG: A Quick Review

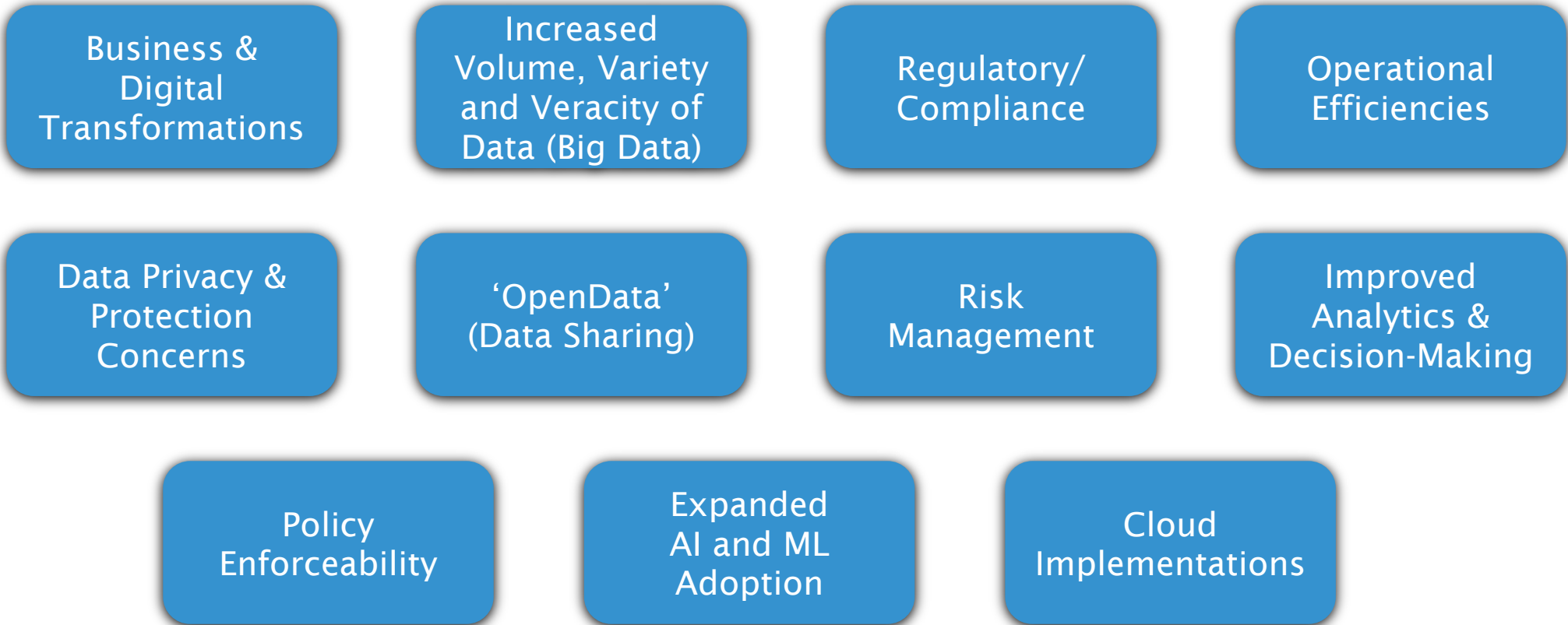
- The focus of Data Governance is on how people, processes and technology interact to manage data to meet business and regulatory requirements.



- ¹ DAMA defines Data Governance as “the exercise of authority and control (planning, monitoring and enforcement) over the management of data assets”.

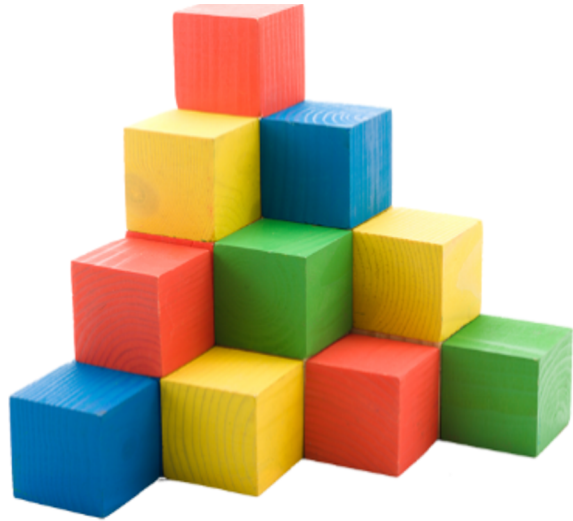
¹ The Data Management Association, DMBok

DG plays a roll in supporting all key initiatives...



The Traditional DG Program Build-Out:

DG 'Building Blocks'



- Data Governance Organizational Structure
- DG Roles and Responsibilities (Ownership / Stewardship)
- DG Workflows and Processes
- DG Artifacts (Business Glossary/Data Catalog)
- Data Policies and Standards
- DG Tools and Technology
- DG Metrics & Reporting
- DG Communication & Change Management

Section 3:

So why is it so hard to achieve business value through DG?

- That requires a 2-part answer:
 - a) Data Governance-centric Challenges
 - b) Business-centric Challenges

a) DG-centric Challenges

- Not having a strong/committed Sponsor
- Not having sustainable funding
- Not having a clear mandate or objectives
- Not having enough, or properly skilled resources to initiate or support the program
- Organization not having a clear understanding of what DG is and does
- Relying on a 'build it and they will come' approach
- Done in a monolithic implementation approach – non-agile
- Lots of DG 'busy-ness' but to what advantage?
- Too much emphasis on technology and tools too early
- Scope of initial roll-out

b) Business-centric Challenges

- Not having clear business pain points (or opportunities) that are being addressed
- Not having a business use case to properly define that pain
- Not having achievable, near-term wins to establish goodwill and momentum
- Not looking at DG as a 'partner', but only as a bottleneck
- Losing interest in engaging with DG
- Not understanding how DG can help alleviate that pain (DG Storyboard!)
- Not being able communicate progress effectively to business stakeholders (DG Dashboard!)

Section 4:

To address both DG-centric and Business-centric challenges, we need a different implementation approach to DG:

“Storyboards to Dashboards”...

What is Business Storyboarding?

A storyboard is a sequence of illustrations, originally used in animation, that map out the steps or sequence of a broader story.

Storyboarding has a few key elements that made it useful:

- An inexpensive way to visualize a story before it got developed in full
- Visualize a whole story with a minimum amount of information
- A way to present and pitch a story before it could get produced

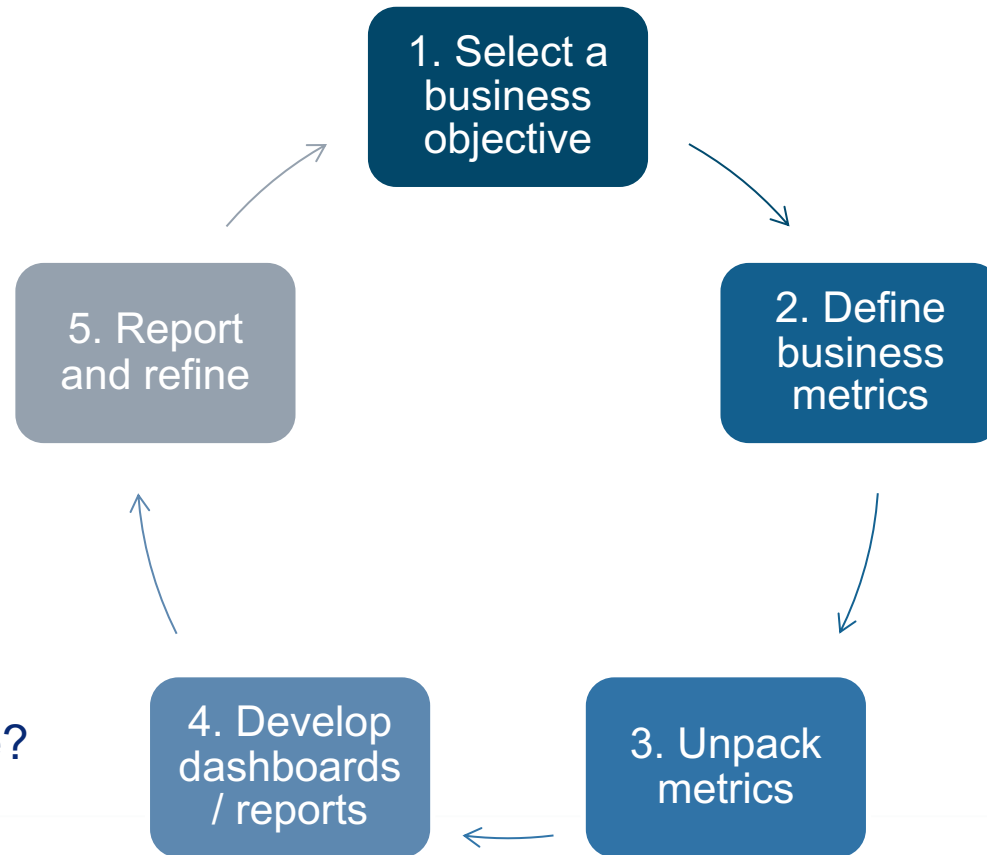
Storyboarding in business can help in other cases like:

- Uncover customer experience
- Align on a longer-term vision
- Pitch a broader project idea

Storyboards to Dashboards

- Who is the target audience?
- When should progress be reported?

- How can the required data be accessed?
- What tools are available?



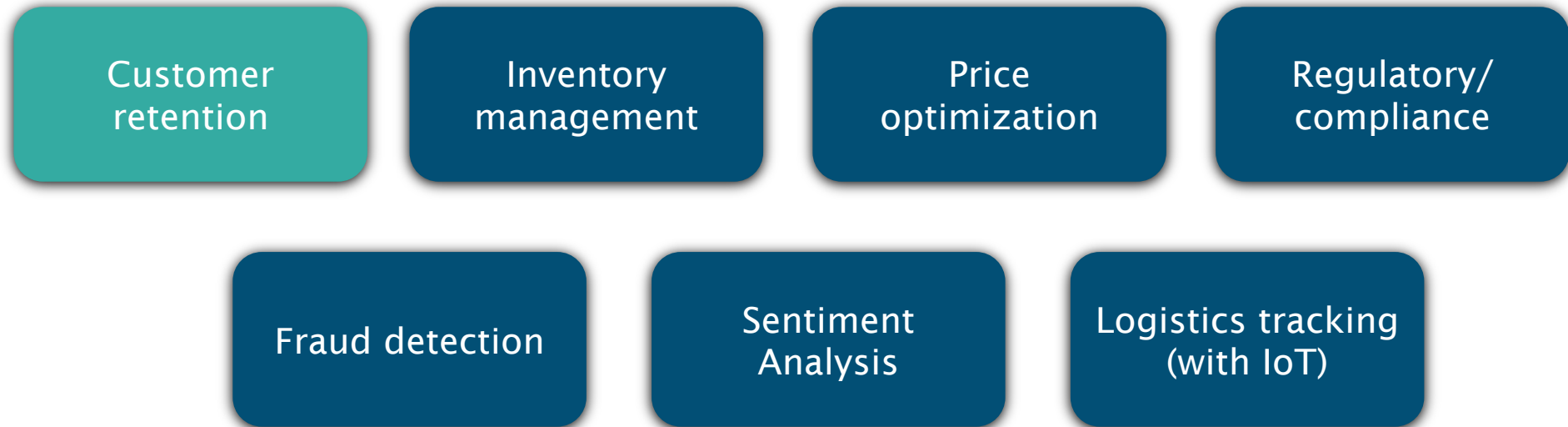
- What are the business objectives?
- How can progress be measured?

- What data is required?
- Are key data governance building blocks in place?

Selecting a business objective

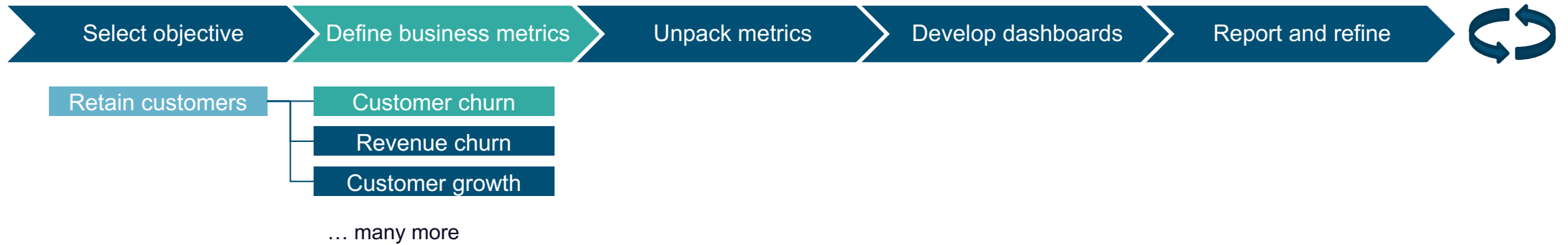


Example business objectives:



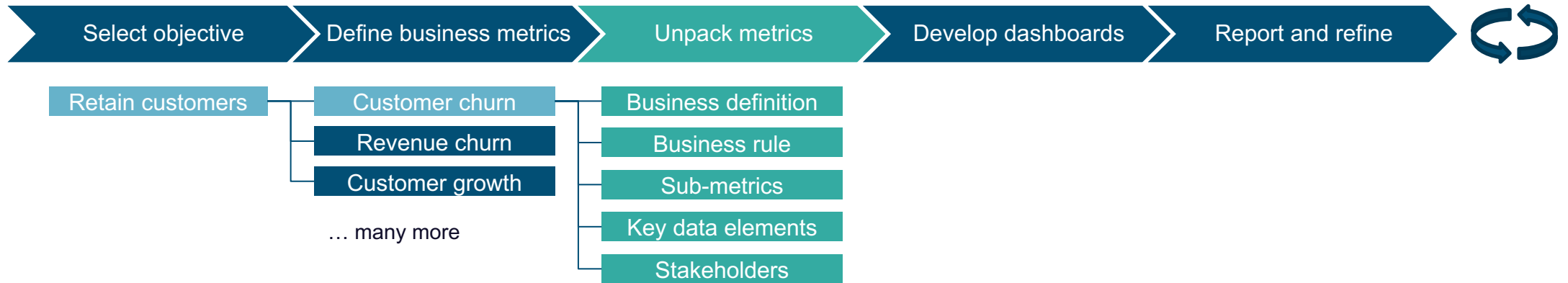
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Customer churn as a business metric



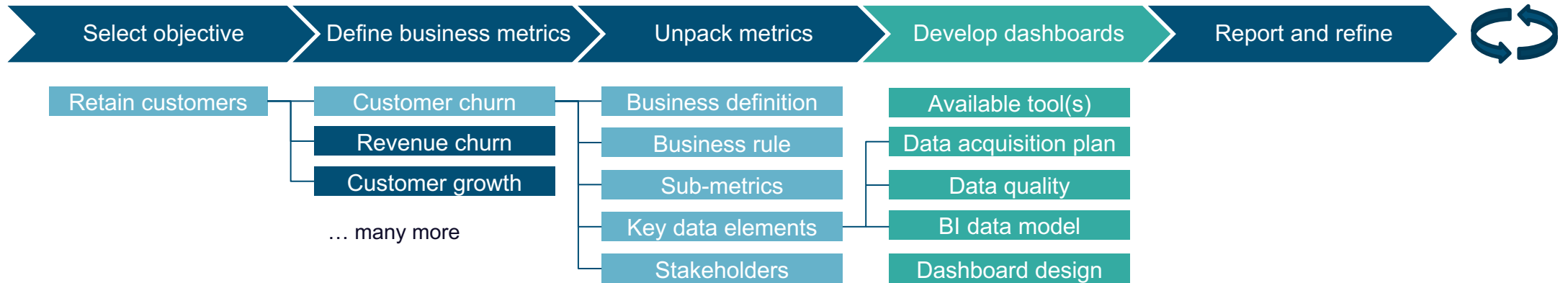
- Avoid data and organization focused metrics such as: “become data centric”, “re-imagine data”, “improve accountability for data” or even “improve data quality” here
- These metrics are important but are often difficult to tie back to clear business drivers and are unlikely to garner long-term support for Data Governance
- Start small with a few important, business focused metrics

Unpacking customer churn



- **Business definition:** *the rate at which customers stop doing business with an entity. It is expressed as the percentage of service subscribers who discontinue their subscriptions within a given time period **
- **Business rule:** $(customers\ at\ period\ start) - (acquired\ customers) / (customers\ at\ period\ start) \times 100$
- **Thresholds:** < 5 % : good; 5 – 10 % : moderate; 10 – 20 % : poor; > 20 % critical
- **Sub-metrics:** *(snapshot count of customers), (count of new customers acquired over period)*
- **Key data elements:** *unique customer identifier*
- **Stakeholders:** *business SME's, Customer Data Owner, Customer Data Stewards, technical SMEs*

Dashboarding customer churn



- Use available BI tools but avoid overemphasis on technology and lengthy RFP processes if possible
- Allow sufficient time for data acquisition as it may present technical and organizational challenges
- Take the time to profile or assess data quality
- A well-designed data layout / data model of the information to be presented is worth the effort

Develop dashboards

Select objective

Define business metrics

Unpack metrics

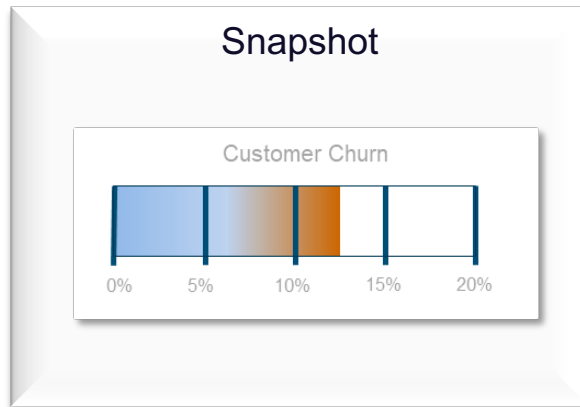
Develop dashboards

Report and refine

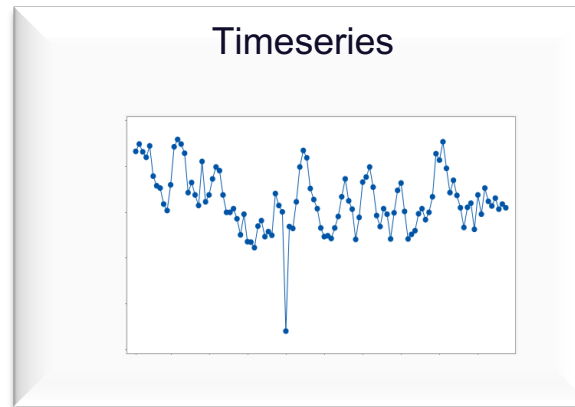


- There are many options for data analysis and dashboarding results
- Some considerations for presenting customer churn and associated Data Governance metrics:

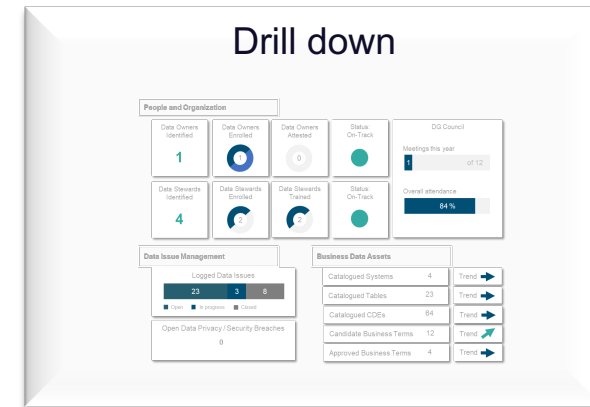
Snapshot



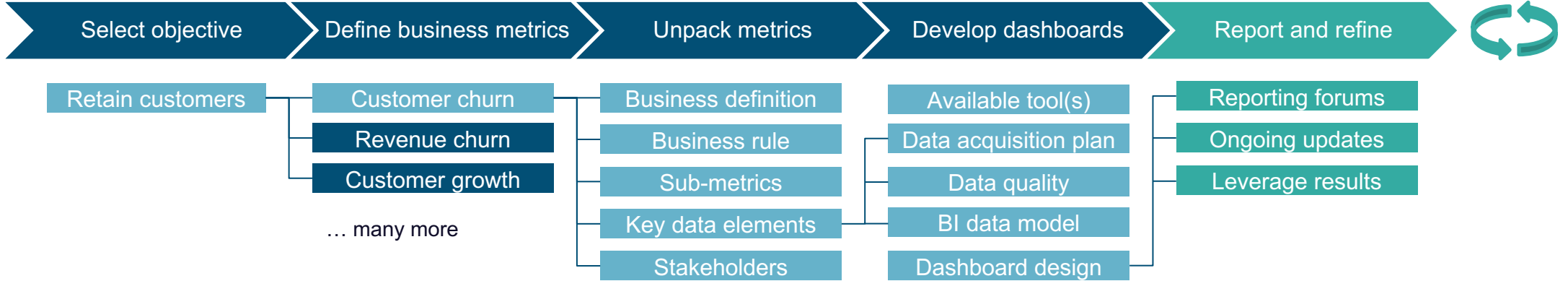
Timeseries



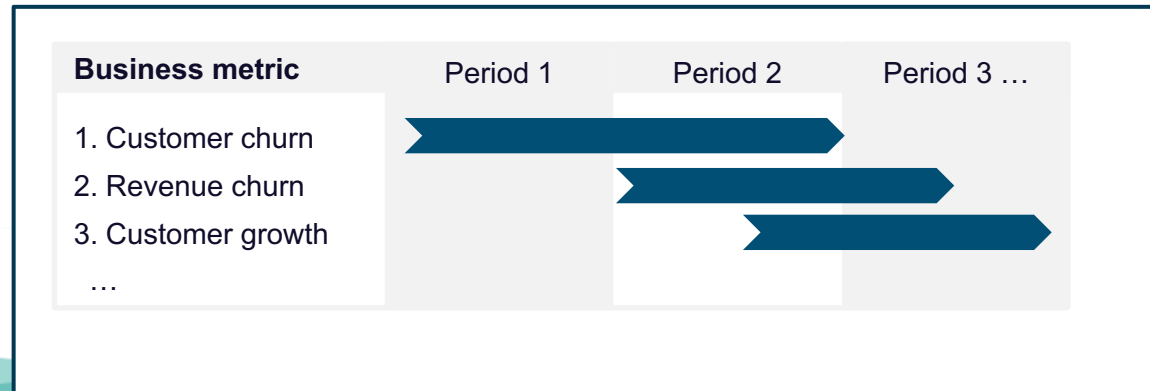
Drill down



Track progress and refine



- Leverage the Data Governance Council and Data Governance Organization
- Present regularly to key SMEs initially and extend the audience as the process matures
- Add business metrics in iterations:



Thank You for Attending / Q&A

We will be providing a link to today's recording on our website:

DataGovernix.com

- Email inquiries@datagovernix.com for a copy of today's presentation

Keep an eye out for our next Webinar invite!

Data Strategy

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- Data Capability Assessments
- Business Use Case Workshops

Data Governance

- Data Governance Health-Check
- 'CDO-on Demand' and Advisory Services
- Data Governance Program Enablement
- Data Ownership & Stewardship Enablement
- DG Metrics and Visualization Workshops

Data Management

- Data Quality Consulting
- Metadata Management
- Master & Reference Data Management
- Data Privacy and Protection Services
- Business Glossary Services