

Developing an Effective Road Map for EIM



IMCue Solutions

Agenda

- Challenges
- Components of the EIM road map
 - A Table of Contents
- The process IT can use to develop a sustainable road map for implementation
 - Segmentation
 - Prioritization
 - Alignment
- Techniques for prioritizing and segmenting the work
- Sustaining elements required for any road map to EIM
 - Manageable project approach
 - Culture change

Challenges

- Enterprise initiatives
- ERP conflict, other packages
- Normal constraints
 - Business environment
 - Internal culture
 - Politics
 - Time, money
 - Chaos

Components of the EIM road map

- Scope (“Enterprise-wide” still requires definition)
- Business objectives
- Target Data architecture
 - Subject Areas and Data models
 - Information Value Chain
 - Revisions to Business Processes
 - Data access framework
 - Taxonomies
 - Data quality standards
 - MDM Areas
 - Data governance approach
 - Data principles
 - Data policies
 - EIM Organization chart

Components of the EIM road map

- Technology Solutions
 - Solutions categories
 - DBMS
 - Middleware
 - Hardware
 - Data movement
 - Meta data
 - Data access / BI
 - Category short lists / recommendations
- Segmentation and Alignment
 - Prioritization factors
 - Business Segments
 - Community Definitions
 - Technology Segments
 - Support Segments

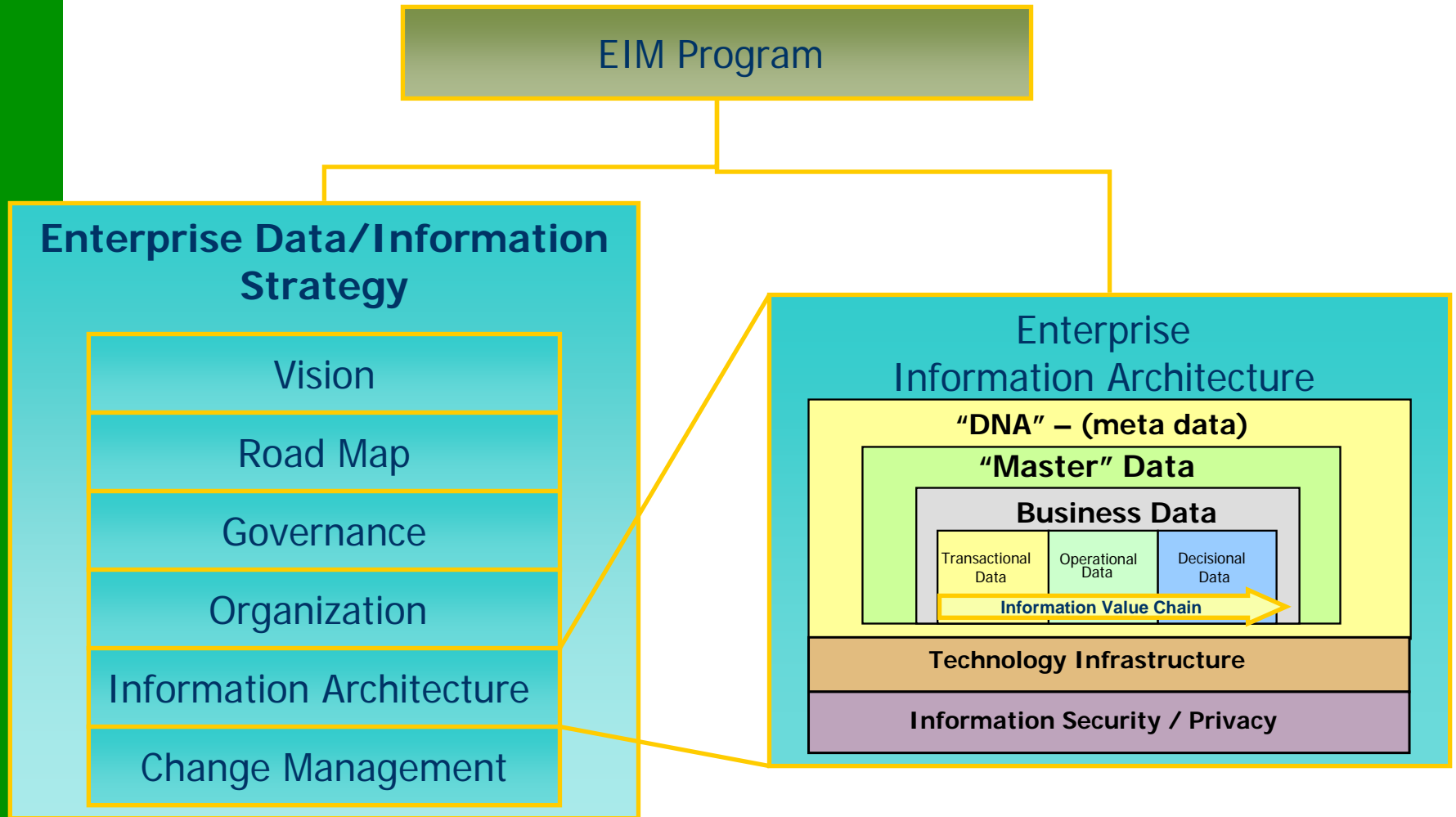
Components of the EIM road map

- Incremental Projects
 - Business projects
 - Governance projects
 - Support/infrastructure projects
 - Discovery
 - Codes
 - Migrations
 - Clean ups
 - Roll out strategy
 - Governance Services
 - Meta data
 - Application and Projects
 - Data Access Framework

Components of the EIM road map

- Sustaining Plan
 - Governance
 - Organization
 - Principles
 - Policies
 - Long term governance roll out
 - Sustaining management
 - Sustaining philosophy
 - Communications plans
 - Sustaining organization
 - SDLC / IT Process modifications
 - Metrics and measures

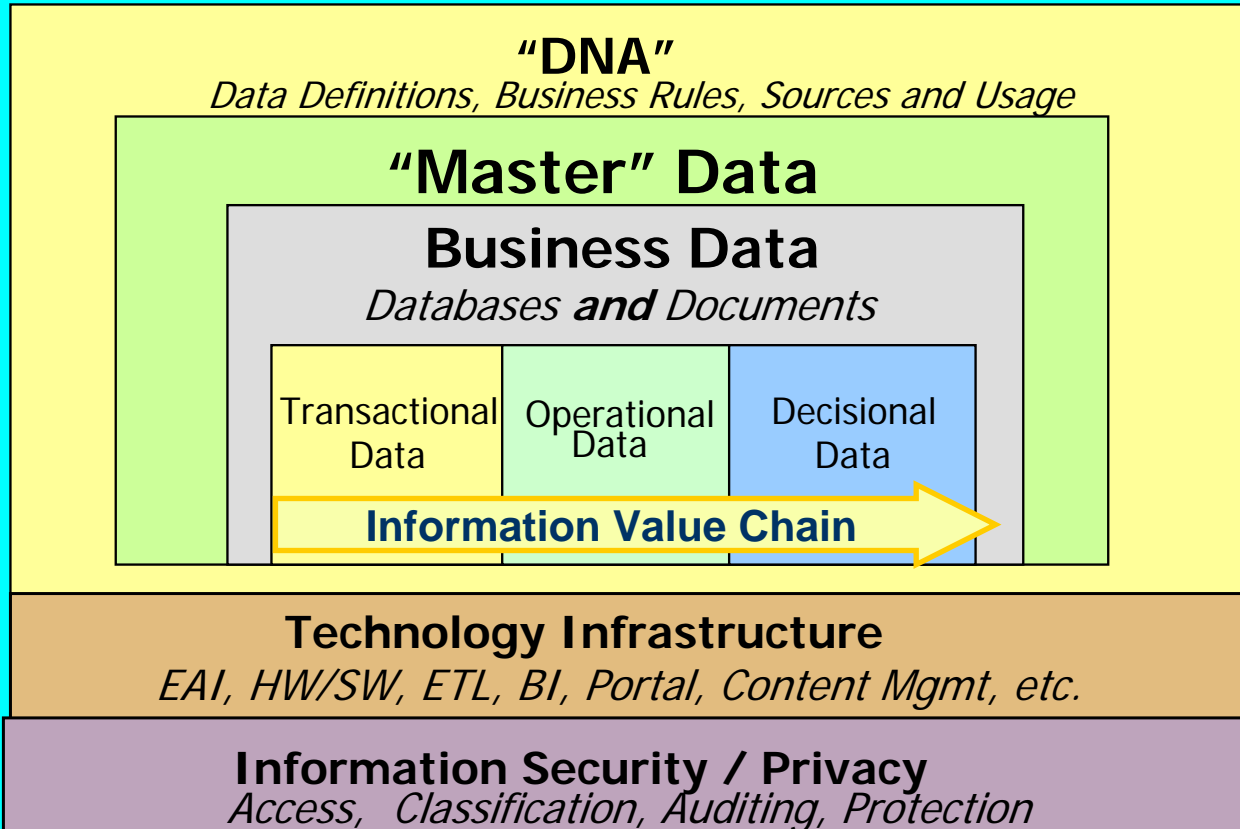
Deliverables of Enterprise Information Management



Deliverables of Enterprise Information Management

Business Drivers, Priorities & Metrics

Enterprise Information Architecture
Guiding Principles, Models, Policies, Standards and Procedures, Projects and Business Actions



Project Approval & Development
Methods

Organizational Accountability, &
Compliance

Roadmap development process

- Confirm Road Map Components
- Segment the end state EIA
 - Which Master Data Areas?
 - Which business functions?
 - Which technology components?
- Align segments with business needs
- Define and Prioritize components
 - Subjects, entities, even elements
 - Infrastructure
 - Governance
 - Sustaining

Roadmap development process

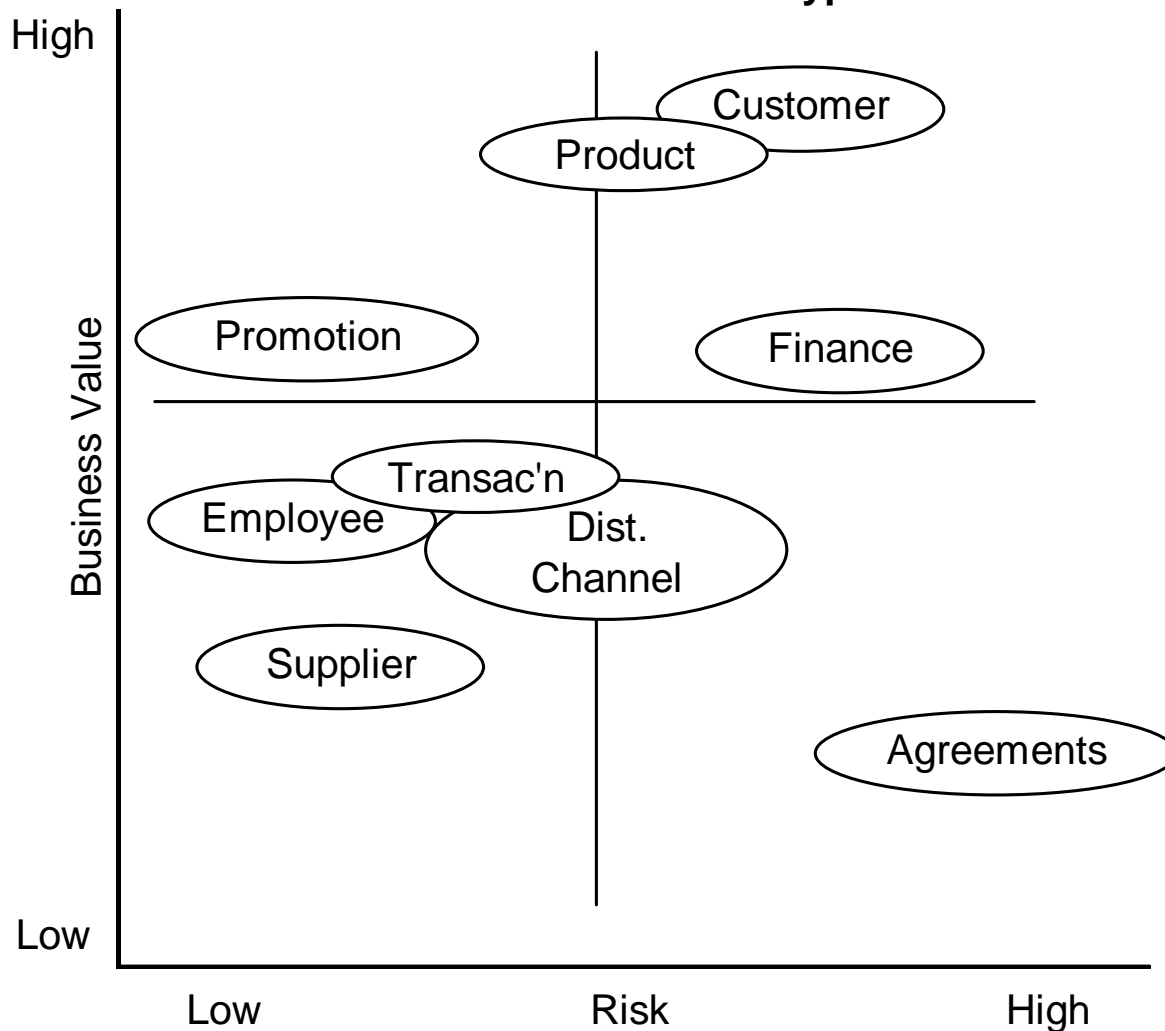
- Define projects
- Define support efforts
- Review preliminary sequences
- Refine and reduce
- Develop project plans and charters

Roadmap development techniques

- Balance business need vs. risk
- Clustering and affinities
- Politics

Roadmap development techniques

Notional View - Balancing Risk and reward by information content type



Roadmap development techniques

	Data Element 1	Data Element 2	Data Element 3	Data Element 4	Data Element 5	Data Element 6	Total
<i>Data Touch Points</i>							
Promote high value clients to blah blah	X	X	X		X		4
Generate request for blah blah programs to sales reps	X	X	X	X			4
Identify Policy blah blah Abuses	X	X	X	X			4
Optimize blah blah Capacity	X	X	X	X	X		5
Alter blah blah re-order quantitie	X	X	X	X	X		5
Identify churn due to blah blah	X	X		X	X	X	5
Adjust blah blah		X		X		X	3
Develop blah blah Forecasts				X		X	2
Alter blah blah Strategy for hi value customers	X					X	2
Develop Customer Segmentation for Incentive Pgms			X				1
New Markets by creating loss leaders					X		1
	7	7	6	7	5	4	

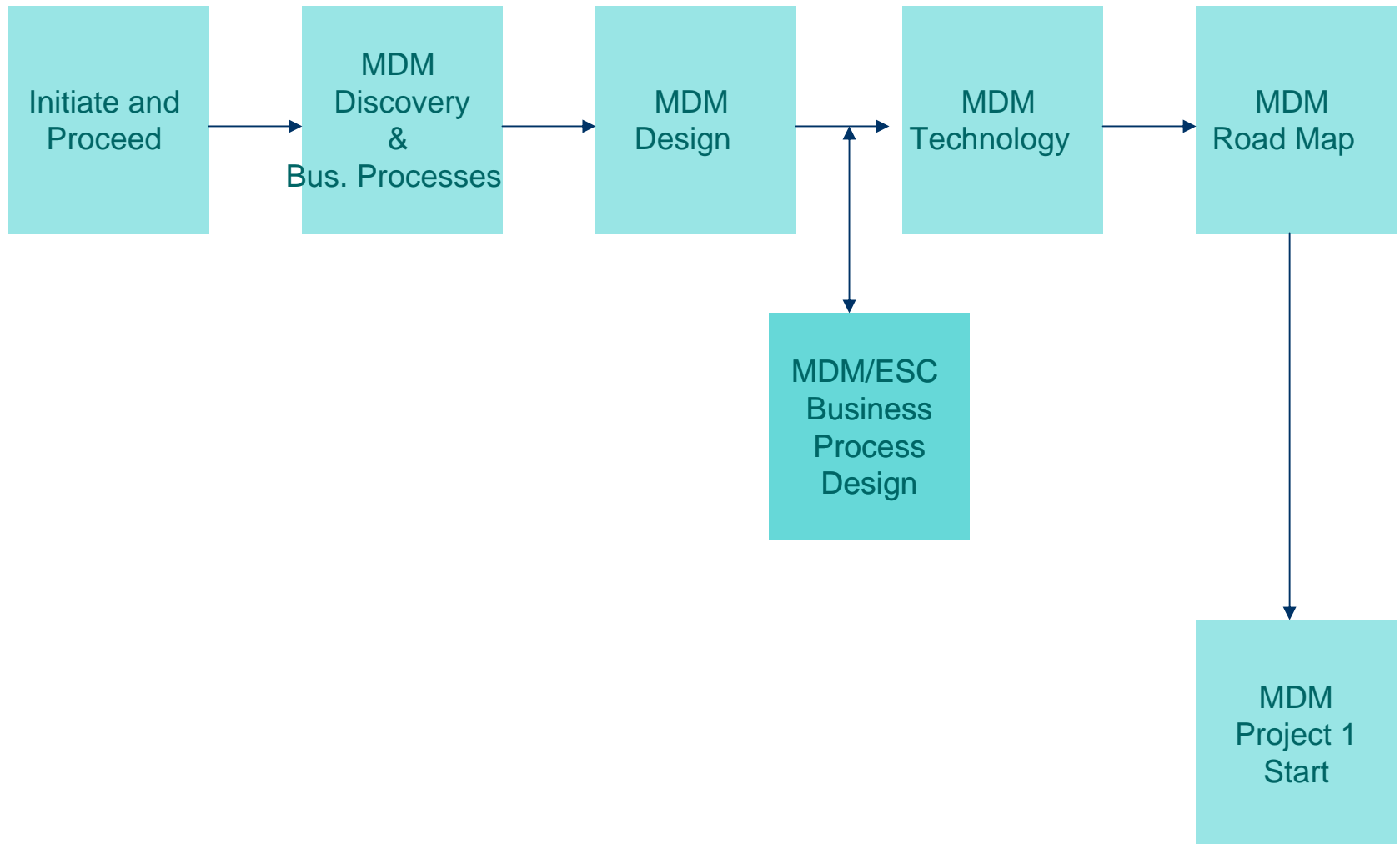
Politics and the Road Map development

- Incorporate a threat assessment
 - Parties for EIM
 - Parties against EIM
 - Parties who don't care
 - External parties with a stake as well
- Provide benefit to opposing parties if possible
- Advertise all successes extensively

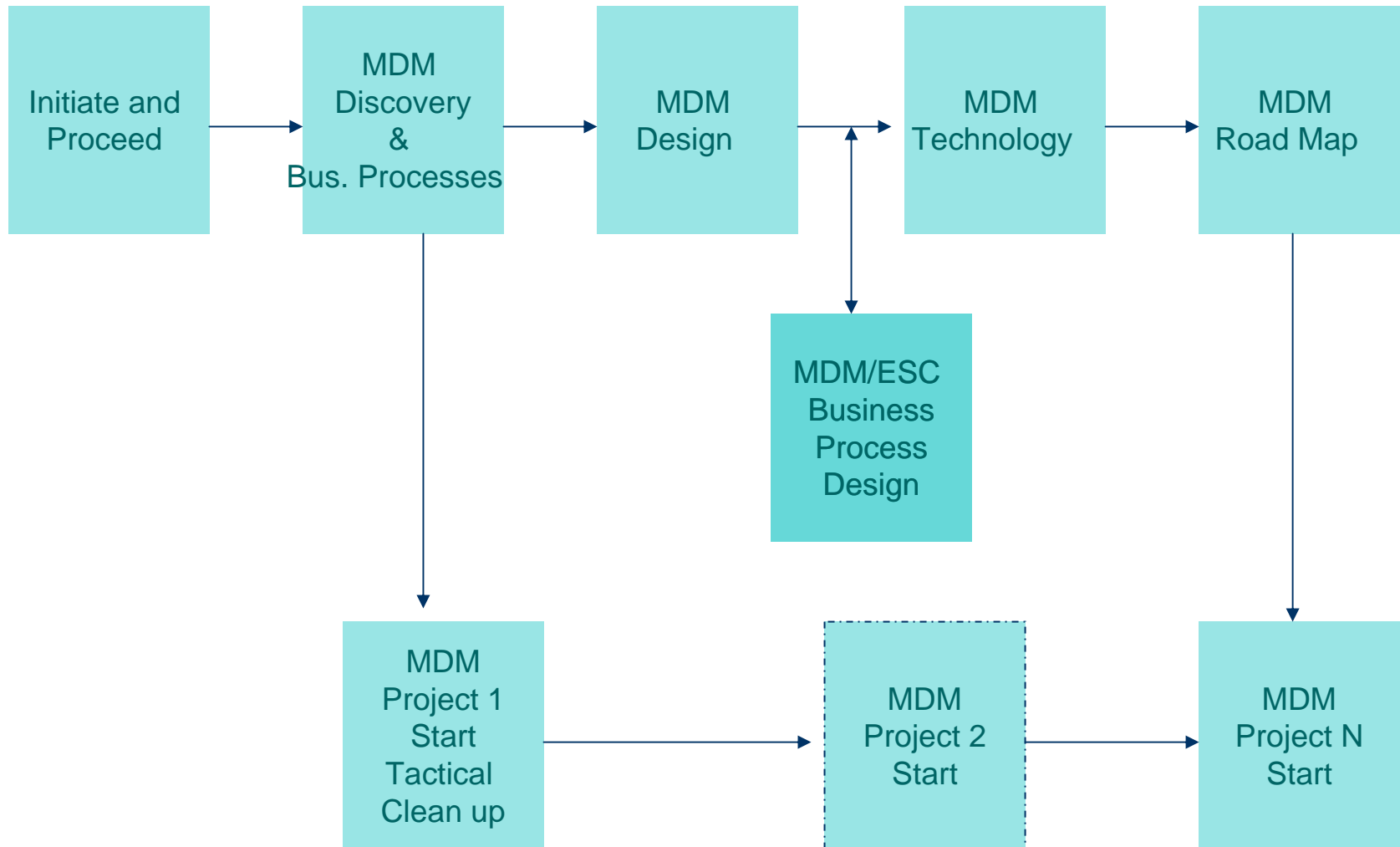
Sustaining components

- Practical approach to developing EIM
- Visual roll out strategies
- Visual version of architecture
- Sustaining change
 - Sustaining philosophy
 - Communications plans
 - Sustaining organization
 - SDLC / IT Process modifications
 - Metrics and measures

Sustaining EIM - Ideal approach



Sustaining EIM - "Practical" Approach



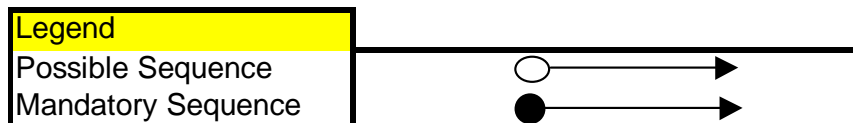
Sustaining Element - Manageable project plan

EDM Program Implementation Strategy

Program Category	EDM Roll Out Projects	2003				2004				2005	
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Project Management	Program Preparation and Planning	====									
	Ongoing Project Coordination/Management	=====									
Change Management	EDM Strategy Development	====									
	EDM Promotion	=====									
	EDM Education	=====									
	EDM Training	=====									
Organization	Enterprise Data Management*	=====									
	Enterprise Data Stewardship*	=====									
	(*Detail Provided In Separate Document)										
Governance	Enterprise Governance Repository	=====									
	EDM Principles	====									
	EDM Policies	====									
	EDM Procedures (SDLC Data Track)	=====									
	EDM Standards	=====									
	EDM Performance Measurement Metrics	=====									
	EDM Continuous Improvement	=====									
Technology	Data Security Management	==									
	Meta Data Management	=====									
	Data Access Management	=====									
	Data Quality Management	=====									
	Data Movement Management	=====									
	Data Quality Measurement Metrics	=====									
EDA Implementation	Operational/Analytical Business Data Arch	====									
	Enterprise Data Model	=====									
	Legacy Data Mapping (to new EDM)	=====									
	Common Enterprise Data Stores	=====									
Business Applications	Product Content Management (PCM)	=====									
	Sales and Key Metrics	=====									
	Marketing and Customer Relevance	=====									
	Distribution Effectiveness and Efficiency	=====									
	TBD ...	=====									
Data Maturity Model Level		1		2		3		4			
		Disciplined		Repeatable		Defined		Managed			

Sustaining - Road Map Sample 1

	Support Project	
Application Projects	Customer Baseline and Dimensions	Customer Profile
Case Performance	● ↓	○ →
Customer Service Level	○ ↓ ○ ↓	← ○ ○ ↓
Call Performance	○ ↓ ○ ↓	← ● ↓
Marketing 1	○ ↓ ● ↓	← ●
Marketing 2	○ ↓ ● ↓	



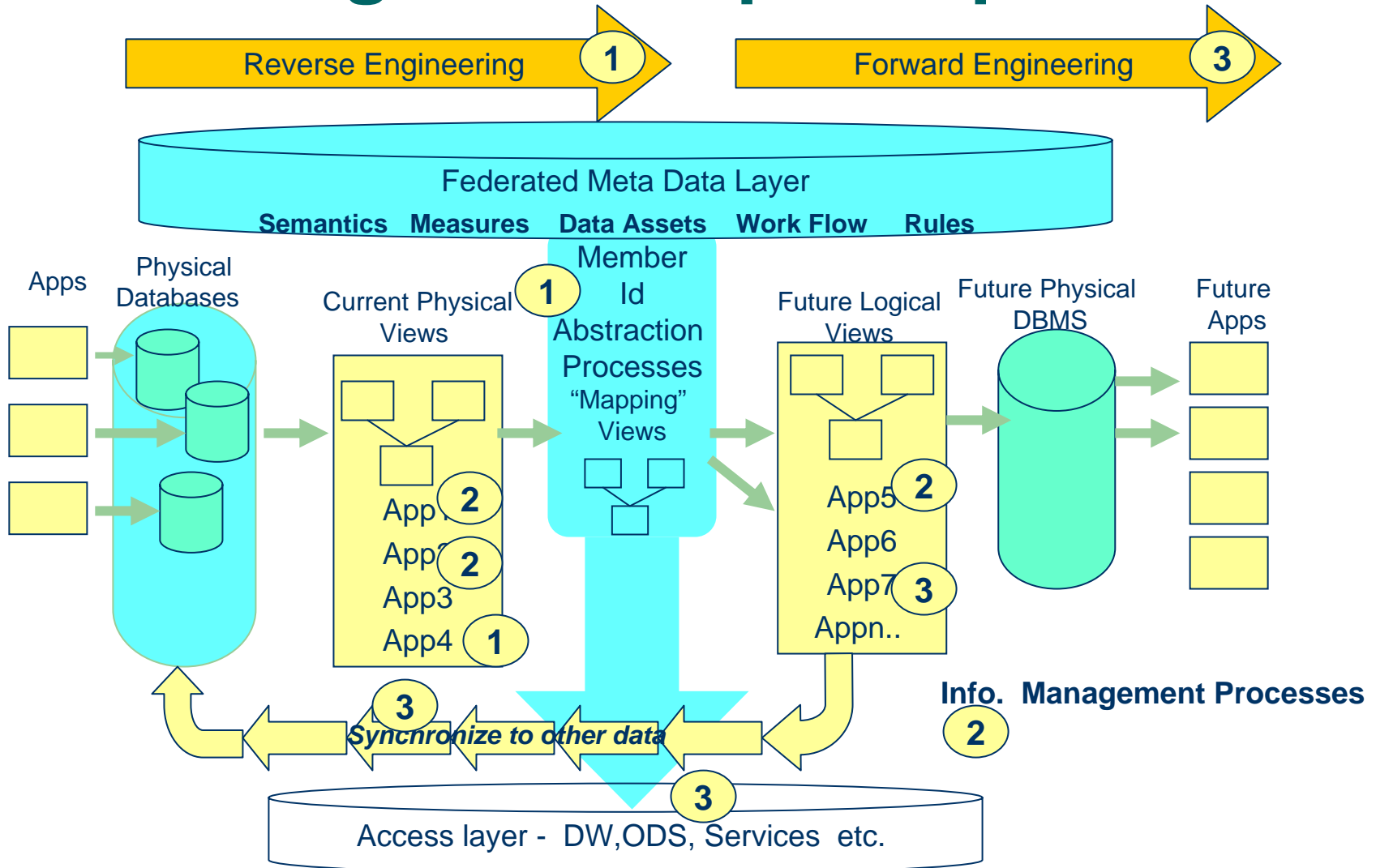
Sustaining Road Map Sample 2

Shown during the presentation

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Sustaining Road Map Sample 3



Sustaining Road Map Sample 4

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Visual Road Map Vision – Portal entry

Shown during the presentation

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Sustaining Element – Change

- Definition – Culture is how organizations do things
- Within and data strategy, culture is a function of:
 - The role of IT and the CIO
 - The commitment of business to data quality
 - Skill sets of IT staff
 - Attitude of business towards IT
- Governance changes culture – period
- Therefore....
 - Assess culture as it applies to using information
 - Define a detailed strategy to manage the culture change

Summary

- Successful EIM requires the usual CSFs (sponsor, buy-in, <<insert your CSF here>>)
- Plus practical balance of IT projects and projects that are noticed by the business
- Plus explicit sequenced road map aligned to business needs with no “infrastructure only” projects
- Plus parallel governance and change management

Building Value Through Information Asset Management^(sm)

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