

Practical Principles Learned in 3 Years of Data Governance

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LDS Church

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THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS



Objectives of this case study

- Share a real case study
- Discuss challenges and achievements
- Be as candid as possible

The Organization

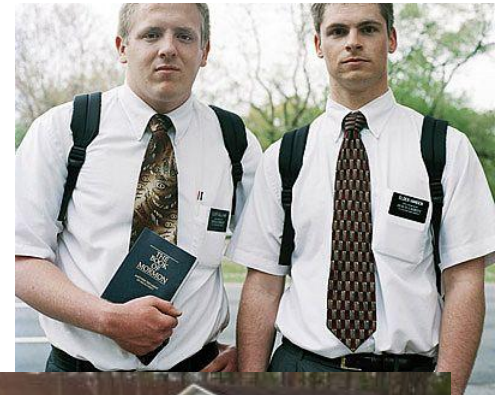
- Large
 - 13 million members in 160 countries
 - 53,000 full-time missionaries
 - Materials translated in 83 languages
 - 264 centrally managed databases
 - Largest Genealogy system in the world
- www.lds.org or www.mormon.org

The Organization

- Large
- Organization (Hierarchical)
 - Governing Council (18 members)
 - Departments (23)
 - Silo Organization
 - Independent information systems
- www.lds.org or www.mormon.org

The Organization

- Large
- Organization (Hierarchical)
- Non Profit
 - Invite people to come to Jesus Christ by
 - Proclaiming the gospel
 - Perfecting the saints
 - Redeeming the dead
 - Clearly defined common purpose and
 - Great people to work with
- www.lds.org or www.mormon.org



- In policy-driven organizations, policies are your friends.
 - Data Stewardship Policy
 - Information Classification and Handling Policy
- Policy implementation is
 - Your authority
 - Your roadmap

- In profit-driven organizations, ROI is your shield.
 - Determine the cost of the program
 - Estimate the value of Customer Data Integration
 - % improved customer retention,
 - % improved repeated business, and/or
 - % improved results of marketing campaigns

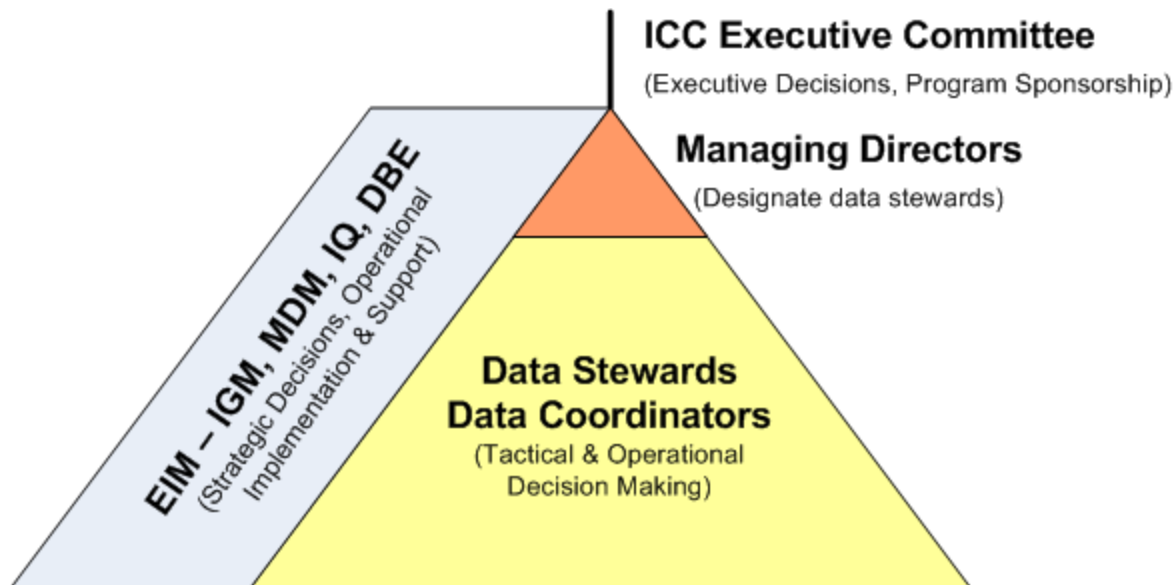
- Organizations dealing with Regulatory Compliance, regulations may be your authority
 - Determine the cost of the program
 - Estimate the value of Regulatory Compliance
 - Saved fines or penalties (how much would the organization have to pay if it fails to comply?)

#2 – Governance Principles

- Principles are your guiding light.
 - Identify your organization’s information governance principles
 - Copy, steal, borrow
 - Write them down
 - Share them, uphold them
 - Make decisions based on your principles
 - Marketing, marketing, marketing

#3 – Structure your Program

- Decide how your program will be organized
- Who makes different types of decisions
- Who implements the program



#4 – Select strategies

- Decide what strategies you are going to implement
 - » You can't do everything.
- What does Governance mean in your organization?
- Develop a short presentation that defines your program

Information Governance & Data Stewards

What is a data steward?

Individuals within the organization given overall accountability for the data under their stewardship.

What are the roles of a data steward?

1. Ensure proper access and use of the data.
2. Ensure the quality, completeness and accuracy of the data.
3. Provide descriptions and classifications of the data.

IGM General Principles

- Avoid data duplication that causes data reconciliation and differences in management reporting.
- Avoid development of duplicate functionality in information systems.
- End-user experience should not be compromised by systems' efficiency.
- Specific enterprise information is clearly owned and resides in one system of record.
- A system of record manages (add, edit, delete) the information it owns for the needs of all departments not just the department that owns the system of record.
- Systems of record provide visibility of their data to other systems as needed and authorized.
- Something about disaster recovery or business continuity.

IGM Main Strategies

- Implement a Data Stewardship program.
- Develop a Master Data Management (MDM) program.
- Classify information, focus on enterprise information.
- Monitor and report information quality.

What can IGM do for me?

- Document and maintain Data Sharing Agreements.
 - During the Plan Phase of projects, what enterprise information does my project need?
 - Who is the steward for this information?
 - Can I get it?
- Assist Data Stewards in their responsibilities.
 - What information do I steward?
 - Who is accessing my information?
 - Who should get it?
- Promote data sharing best practices.
 - How is the information being shared?
 - How can we share information better/safer/faster?
- Promote information quality improvement initiatives.
 - What is the quality (accuracy, completeness) of my information?
 - What can we do to improve information quality?

What Enterprise information is available?

- Enterprise Information
 - Information used by various consumers (departments, people, systems) throughout the enterprise for different reasons
 - (e.g. property addresses, unit boundaries, organizational hierarchies, person's mailing addresses, project progress)
- Available from the Master Data Management Repository (MDM)
 - Currency
 - Exchange Rates
 - Languages
 - Geopolitical Locations (countries, states/provinces)
 - Time zones
 - Organizations
 - Leaders and Assignments
- Soon to be available through MDM
 - Employee contact data
 - Employee reporting hierarchy
 - Property data
 - Using Unit Relation (which organizations are in what location)
 - Applications

#5 – Leverage other efforts

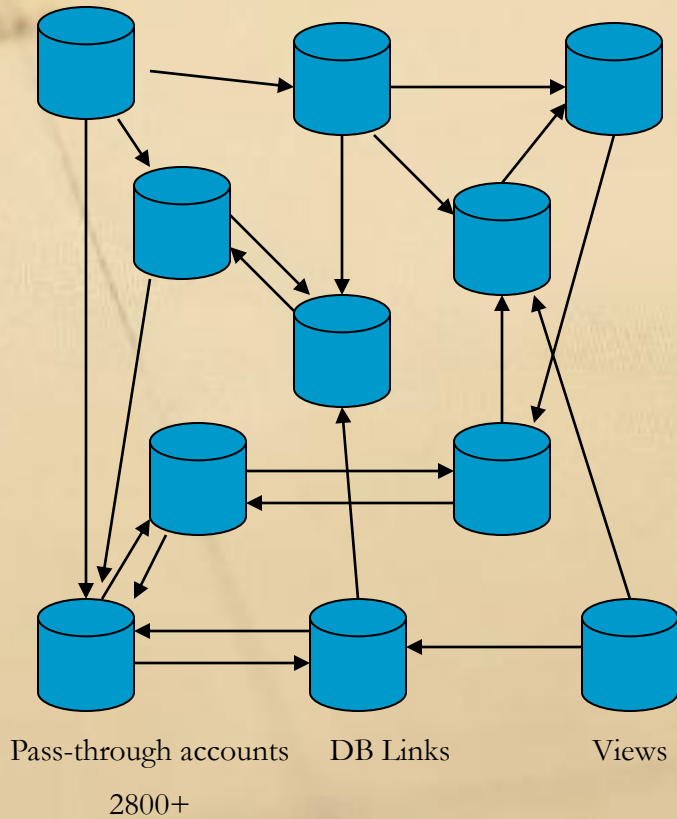
- What other efforts are already going on?
- Build alliances with other groups
 - Offer to help
 - Can I help you document your processes?
 - How can DG help you?
 - Beware of blind alleys and distractions
- Different parts of the organization were already working on initiatives
 - MDM project
 - Enterprise Architecture
 - Information Security
 - Web Services group

Master Data Management - Definition

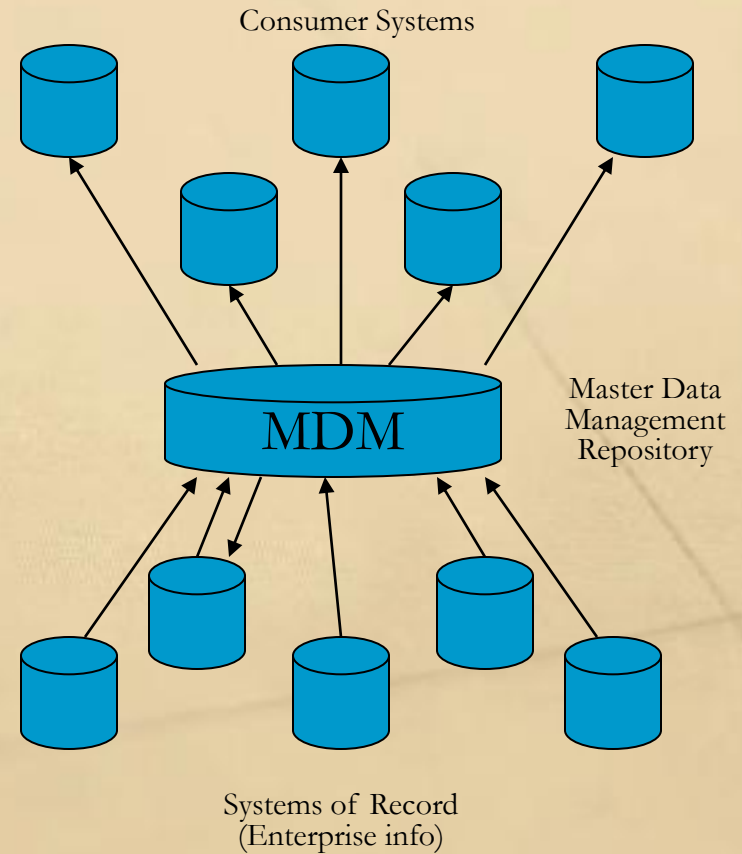
Master Data Management (MDM) is a set of processes, technologies, strategies to securely provide accurate and consistent enterprise data.

Data Management

Current state



Future state



MDM Goals

- Provide accurate data to Church applications
- Improve consistency of data reporting across the Church
- Ensure the security of data
- Enforce policies for use of data
- Reduce development time
- Eliminate the need to maintain master data in each application
- Decrease maintenance costs

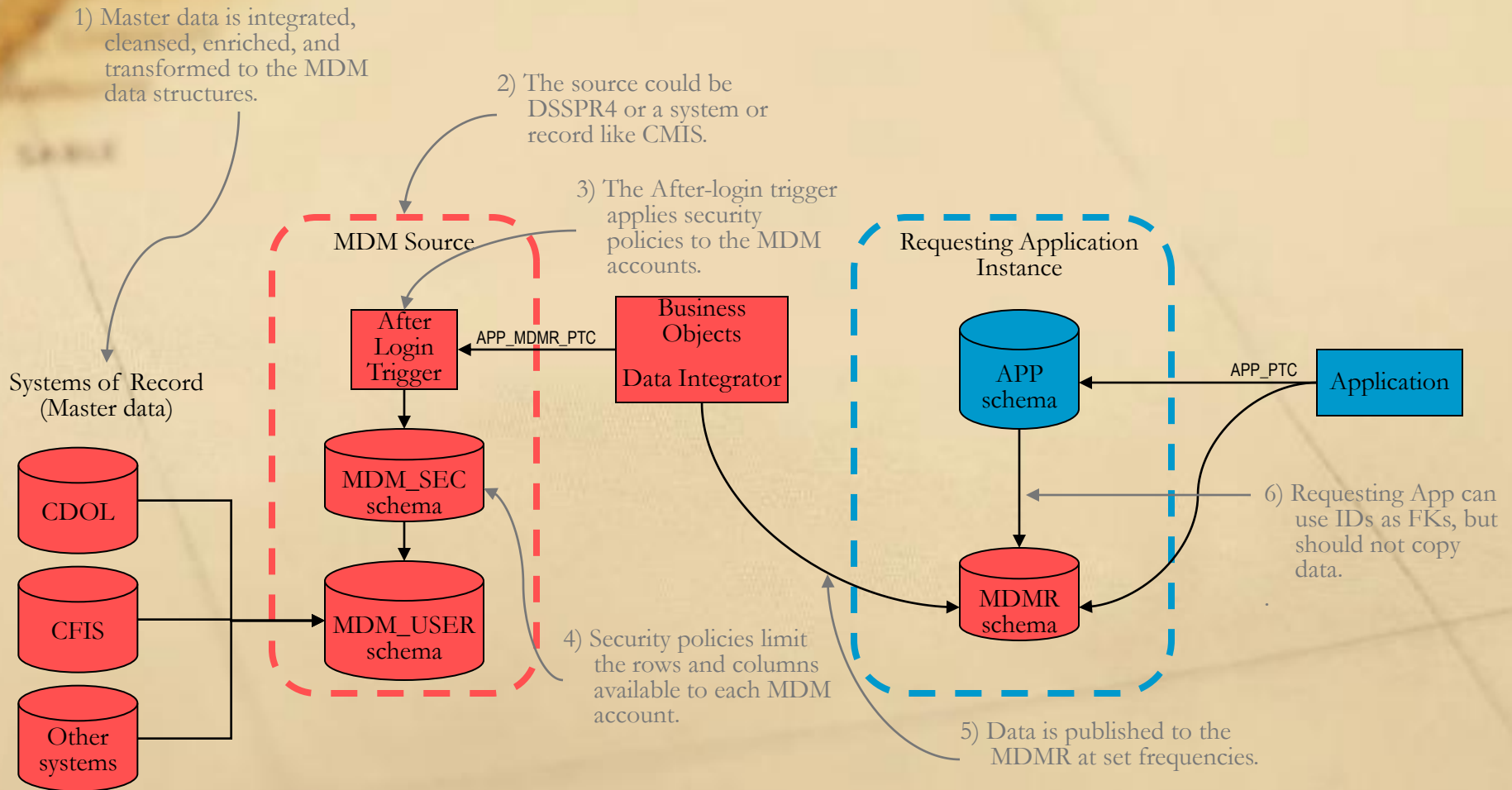
MDM Strategy

- Designate authoritative sources of master data and select stewards
- Provide interfaces for cleansing and enrichment of data
- Share master data from the source with other applications
- Create a common data model and interfaces for using master data in applications
- Centralize administration of security and data use policies (at the application level)

MDM Implementation includes:

- Establishing the repository:
 - Selection of a data source (MDM_User or another source)
- Publishing the repository:
 - Create MDMR schema with a common data model in each application database
 - Build applications that use foreign keys to the master data instead of copying the data
 - Use Data Integrator to replicate data to MDMR schemas
 - Re-use same code for every application
 - Use VPD to enforce data use policies specific to each application
 - Create a passthrough account on the source
 - Administer MDMR data privileges for each application centrally (Integration team)

Master Data Management - Architecture



#6 – What needs governance?

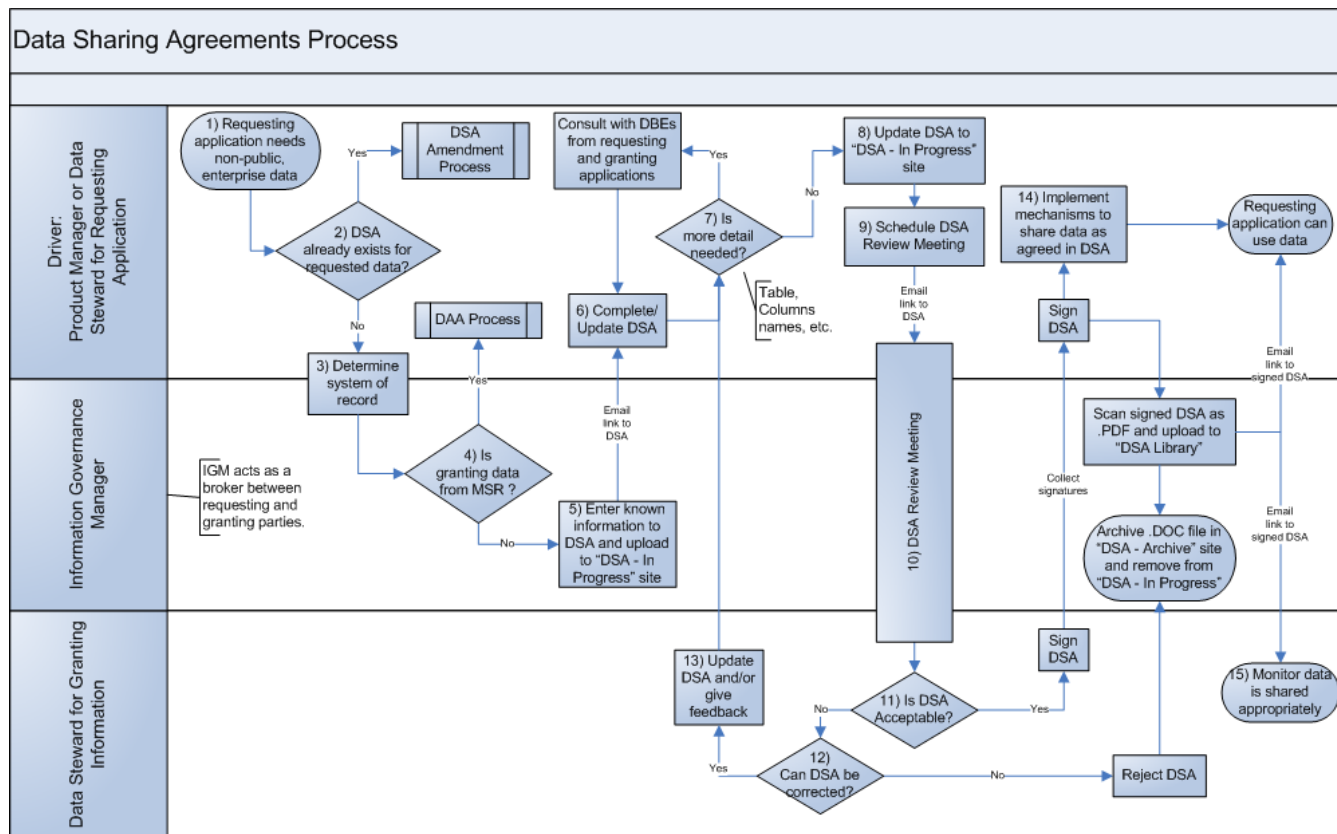
- Not all information is equal
- Focus on enterprise information
 - What information in your enterprise is most often requested?
 - Organization, Leaders, Members, Employees, Facilities
 - What information is easily governed?
 - Reference data
 - Geopolitical locations, currencies, exchange rates
 - What information suffers poor quality?
 - Addresses
 - What information is independently duplicated?
 - Member data (names, addresses, phones, email, etc.)

#7 – Who are the stewards?

- Good data stewards are discovered
- Define the process for designating data stewards
- Train them
- Market the program to them and them to the organization
- Delegate to the stewards (they govern, you don't)
- Serve the stewards (by taking upon yourself to do the stuff)
- Establish a Data Stewards Council

#8 – How is governance done?

- Define and document the Data Governance processes
- Propose, promote, change them as necessary



#9 – Select or develop tools

- There are lots of tools in the market
 - They are getting better as DG matures
 - If you buy tools early
 - The tools will define many aspects of your program 😞 😊
 - If you wait to buy tools
 - The program may suffer for lack of infrastructural support 😞
 - You will need to develop something
 - (I suggest low-cost tools for these efforts)
 - Spreadsheets, documents, flowcharts, presentations

#10 – Learn from the best

- Attend professional conferences
- Presented on Year 1 experience
- Relearned what I should have already learned
 - Common Data Matrix
 - New year's resolutions
- Network, network, network
- Recharge, rehope, retry!

#10 – Learn from the best

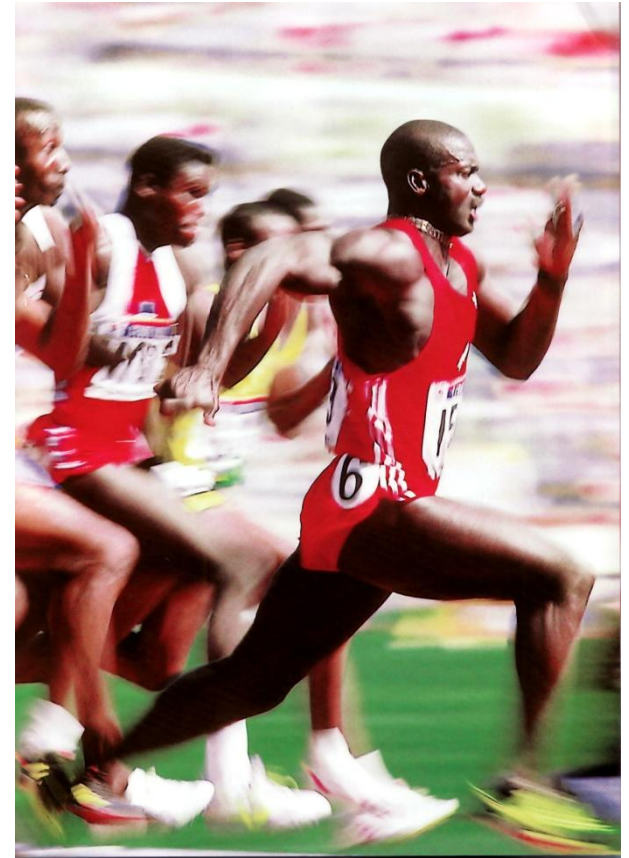
- Engage consultant services
 - Disclaimer (I have not)
 - DG consultants usually have short, focus, effective engagements
 - They can help you to
 - Structure the program defined for your organization
 - Gain support and increase visibility

#11 – DG is a Program

- DG is a Program,
- DG is a marathon,

Not a Project

Not a sprint



#11 – DG is a Program

- Beware of the Doldrums 😞
- Organizational changes
- Lack of resources
 - No program management
 - Project stuck in the process
- Getting comfy in the status quo
- The bureaucracy can beat you up 😞
- Smile! You are part of the bureaucracy! 😊

#11 – DG is a Program

- More than a marathon!
- Welcome to ultra-running!



QUESTIONS?

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THANK YOU!

