



Implementing a Data-centric Strategy & Roadmap

Focus on what really matters ...

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datablueprint.com

Lewis Broome



- CEO Data Blueprint 20+ years in data management Experienced leader driving global solutions for Fortune 100 companies
- Creatively disrupting the approach to data management
- Published in multiple industry periodicals

Peter Aiken

• 30+ years DM experience



- 9 books/ many articles
- Experienced with 500+ data management practices
- Multi-year immersions: US DoD, Nokia, Deutsche Bank, Wells Fargo, & Commonwealth of VA



We believe ...

Asset: A resource controlled by the organization as a result of past events or transactions and from which future economic benefits are expected to flow [Wikipedia]

Financial

Assets

Can be

used up

V

V

Real

Estate Assets

Can degrade

over time

V

Inventory

Assets

Can be

used up

Can degrade

over time

 Today, data is the most powerful, yet underutilized and poorly managed organizational asset

Non-

depletable

Non-

degrading

Durable

Strategic

Asset

Data

Assets

Available for

subsequent

use

V

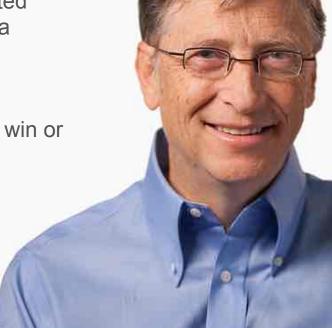
Non-taxed

- Data is your
 - Sole
 - Non-depleteable
 - Non-degrading
 - Durable
 - Strategic
- Asset
 - Data is the new oil!
 - Data is the new (s)oil!
 - Data is the new bacon!
- Our mission is to unlock business value by
 - Strengthening your data management capabilities
 - Providing tailored solutions, and
 - Building lasting partnerships

UNLOCKING BUSINESS VALUE

A popular quote from Bill Gates

- Virtually everything in business today is an undifferentiated commodity, except how a company manages its information. How you manage information determines whether you win or lose.
 - Bill Gates





That quote in context

- Application design and business are now irrevocably linked. According to Bill Gates, "Virtually everything in business today is an undifferentiated commodity, except how a company manages its information. How you manage information determines whether you win or lose. How you use information may be the one factor that determines its failure or success or runaway success"
 - Bill Gates
 The Sunday Times
 1999



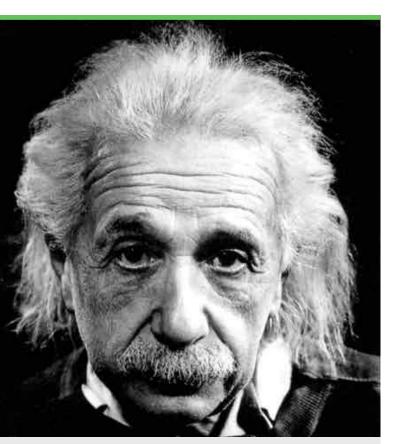
UNLOCKING BUSINESS VALUE

Outline

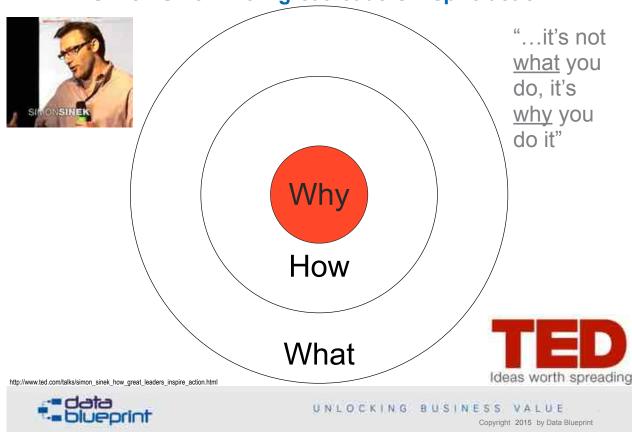
- Data Strategy Overview
- Determining the Business Needs
- Target Measurement & Success Criteria
- Current State Analysis
- Developing the Strategic Data Imperatives
 - Business Value Targets
 - Data Management Capabilities
 - Tactics/Vision
- Developing a Roadmap
- Q&A



"The significant problems we face cannot be solved at the same level of thinking we were at when we created them." - Albert Einstein



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Simon Sinek: How great leaders inspire action

Why Data is Creating a Competitive Advantage

- Adds value to products & Services
- Enhances the customer experience
- Creates transparency & efficiencies
- High-quality data enables 'more with less'
- Creatively disrupts how we work
- Volume & velocity exerting pressure on operating models & infrastructure

"...it's not what you do, it's why you do it" Simon Sinek

http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action.html

- data

noun

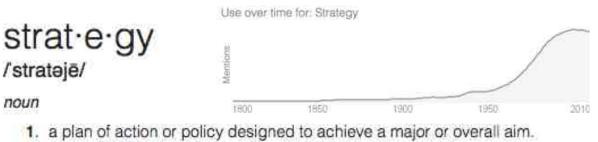
Why Vision

How

Process

What Outcome

What is a Strategy?



- "time to develop a coherent economic strategy" synonyms: master plan, grand design, game plan, plan (of action), action plan, policy, program; More
- Current use derived from military
- "a pattern in a stream of decisions" [Henry Mintzberg]
- "a system of finding, formulating, and developing a doctrine that will ensure long-term success if followed faithfully [Vladimir Kvint]



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Strategy in Action: Napoleon defeats a larger enemy

- Question?
 - How to I defeat the competition when their forces are bigger than mine?
- Answer:
 - Divide and conquer!
 - "a pattern in a stream of decisions"

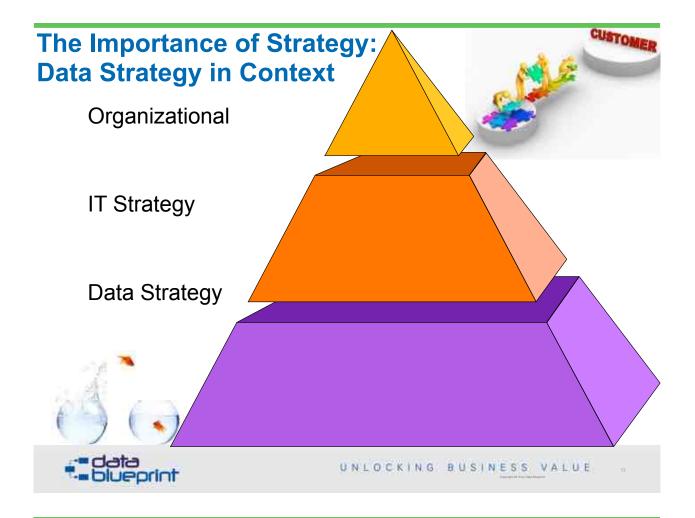




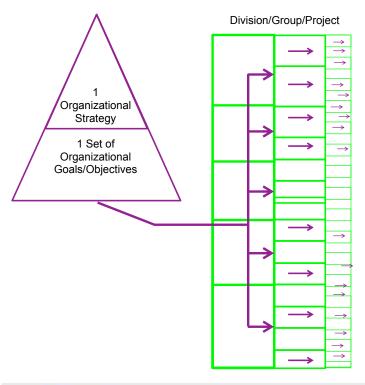
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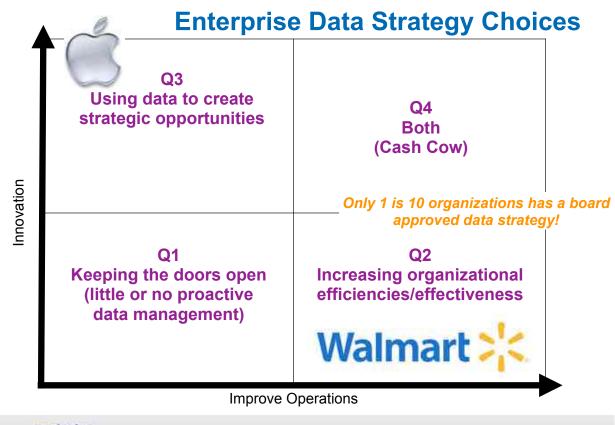


Organizational Strategy is Difficult to Perceive at the IT Project Level



- If they exist ...
- A singular organizational strategy and set of goals/objectives ...
- Are not perceived as such at the project level and ...
- What does exist is confused, inaccurate, and incomplete
- IT projects do not well reflect organizational strategy

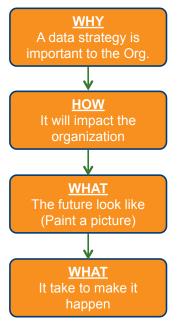




-data blueprint

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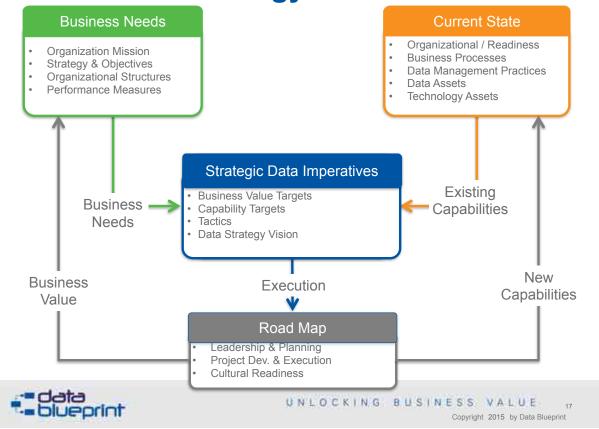
What to Expect from a Data Strategy



- Forces an understanding of data's importance
- Creates a vision for the organization
- Identifies the strategic imperatives
- Defines the benefits and key measures
- Describes needed data management improvements
- Outlines the approach and activities
- · Estimates the level of effort and investment



Data Strategy Framework



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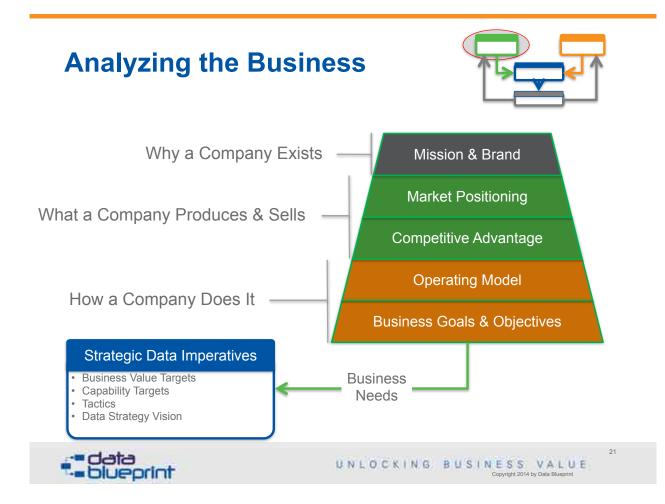


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Common Problem







Mission & Brand Promises

A **mission statement** is a statement of the purpose of a company; its reason for existing; a written declaration of an organization's core purpose and focus that normally remains unchanged over time. (Wikipedia: http://en.wikipedia.org/wiki/Mission_statement)

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= data = blueprint A **Brand Promise** is what you promise people will receive when they do business with you. It is based on what truly differentiates your company from others.

- It must convey a compelling benefit
- It must be authentic & credible
- It must be kept, every time



CKING

Brand Promises - Quick Examples



- FedEx Your package will get there overnight. Guaranteed.
- **Apple** You can own the coolest, easiest-to-use cutting-edge computers and electronics
- McKinsey & Company You can hire the best minds in management consulting
- **The Nature Conservancy** *Empowering you to save the wilderness*
- **Data Blueprint** *Tailored Solutions, Strengthening Capabilities* and Lasting Relationships

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Porter's Market Positioning Framework



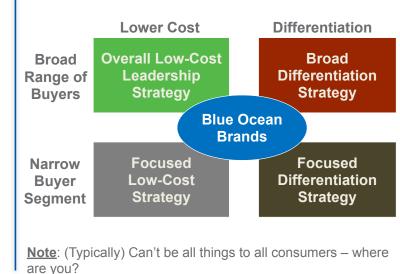
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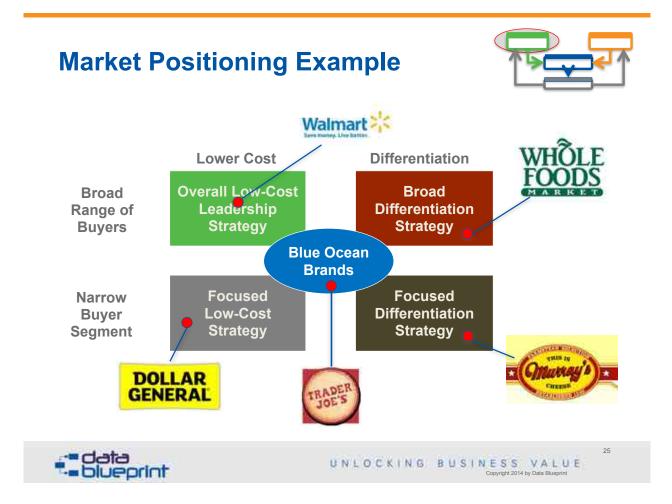
Product Differentiation: How specifically focused are your products?

Cost: Are you competing on cost? How costsensitive is your market?

Market Scope: Are you focused on a narrow market (i.e. niche) or a broad market of customers?



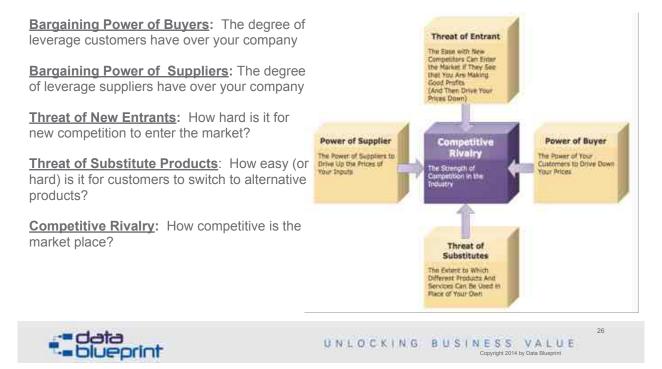




Porter's Competitive Advantage Framework



Given Market Positioning, how does your organization further compete?



Case Study: Operating Model



Coordination

High

Business Process Integration

Shared customers, products or suppliers
 Impact on other business unit transaction

Operationally unique business units or functions

Autonomous business management

Business unit control over process design
 Consensus processes for designing IT infrastructure

services +IT application decisions made in business units

Diversification

*Few, if any, shared customers or suppliers *Independent transactions

*Operationally unique business units

Autonomous business management

Business unit control over business process design
 Few data standards across business units
 Most IT decisions made within business units

Low

Unification

 Customers and suppliers may be local or global
 Globally integrated business processes often with support of enterprise systems

*BU's with similar or overlapping operations

- *Centralized management often applying
- functional/process/business unit matrices
- *Centrally mandated databases
- +IT decisions made centrally

Replication

Few, if eny, shared customers

- +Independent transactions aggregated at high level
- Operationally similar business units
- *Autonomous BU leaders with limited discretion over processes
- •Centralized control over business process deaign •Standardized data definitions but locally owned
- *Centrally mandated IT services

High

Business Process Standardization

*Source: Gartner

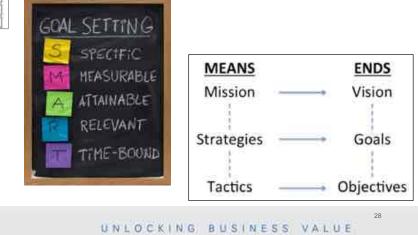
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Business Goals & Objectives



	Commitments
OBJECTIVE 1	Commission 1.1
The Descare of the South and Antone field	Commitments (
	Committee 2
OBJECTIVE 2	Gummitment 2.1
Landau and Constantion and	Commitment 2.1
	Garmet United 3
OBJECTIVE 3	Carrowinset 3.1
1	Commitment 3.0

- · Definitions vary, overlap and fail to achieve clarity
- The most common of these concepts are specific of intended future results
- Most models refer to as either goals or objectives (sometimes interchangeably)





Goldman

Sachs

Business Goals – Quick Examples





Case Study: Logistic Company

30

- Fortune 450
- 4 Divisions
 - Truck Load (OTR)
 - Intermodal
 - Outsourcing Service
 - Broker Services
- Significant Growth over the last 10 years
- Enterprise-wide modernization program
- Recognized need to be data-driven to compete

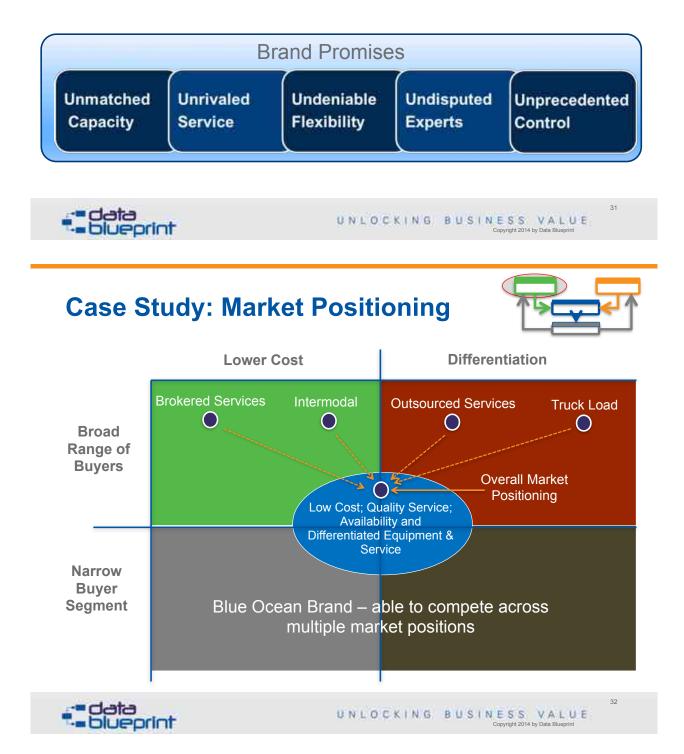


Case Study: Mission & Brand Promises



Reach \$10 Billion in revenue by the year 2020

<u>Mission</u>: "We compete with other transportation service companies primarily in terms of price, on-time pickup and delivery service, availability and type of equipment capacity, and <u>availability of carriers for logistics services.</u>"



Case Study: Competitive Advantage



Power of Buyer

33

Threat of Entrant

Threat of Substitutes

Can Be

- Buyer Power is moderate to weak
 - 4 divisions at multiple price points ("Full Service")
 - High switching costs for some customers
- Threat of Entrant is weak
 - High capital requirements
 - Strong brand recognition
- Supplier Power is moderate to strong
 - Limited # of drivers; Very Poor Retention Rates
 - Limited railroad capacity (Intermodal)
- Threat of Substitutes is weak
 - Railroads are a strong substitute; they lead in Intermodal



High

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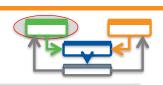
Business Process Integration

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Power of Supplier

e Power of

Operating Model Framework



Coordination

 Shand customers, products or suppliers
 Impact on other business unit transaction
 Optimationally unique business units or functions
 Autonomous business management
 Business unit control over process design
 Consensus processes for designing IT intrastructure services
 IT application decisions made in business units
 So What...
 The four divisions share the same customers

-but...operate as autonomous business units
- •A shared (or enterprise) view of customers, drivers, equipment is difficult
- Integrated processes across business units is difficult

Redundant solutions

Low

Business Process Standardization

High *Source: Gartner



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34

Case Study: Business Goals & **Objectives**

Coala a

Rove

Market Facing

Rove

Cosils a Marpin

Marpin



- Operate at a 98% on-time delivery service. level
- Provide customers with real-time control and transparency over their orders Market Facino
- Increase # of proactive order failures resolved by 20%

#1 in on-time dalivery Operational excellence thru a culture of entrepreneur & proactive behaviors

- Reduce cost per order execution by 12%
- Reduce # of accidents by 7%
- Increase driver retention rates by 20%

- data -- blueprint Increase service offerings utilized per customer by 12%

- Reduce customer detected dispatch error rates by 14%
- Optimize asset capacity across business units by

COALS:

- Capacity and flexibility to meet all our clients demands
- Increase revenue & margin thru Integrated business units
- Increase asset utilization by 15%
- Increase order execution rates by 10%
- Increase Intermodal Revenue by 15%

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of errors for trailer pool data

of errors for train ETA data

of cross-selling orders

of ETA errors for dispatched truck

Time to view complete order history

GOALS Capacity and flexibility to meet all our clients demands

Increase revenue & margin thru integrated business units

of solicitation calls and success

% of allocation compliance

· Revenue per truck per day

% of equipment utilization

% of Driver utilization

Case Study: KPI's

- % of on-time pick-up and delivery.
- % of customer reported service failures
- Time to respond to customer ad hoc queries
- # of customer order status inquires
- # of customer self-monitored orders

#1 in on-time delivery Operational excellence thru a culture of entrepreneur & proactive behaviors

- # of Orders booked
- # of Auto-accept orders
- # of Load assignments
- · # of Auto-assigns
- # of no-loads and am-loads
- # of Drivers per dispatcher
- · # of Auto-dispatches



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rates

of turndowns

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-data blueprint

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Measuring Business Value

- Define success criteria as specific metrics
- Not always intuitive and at first seems difficult
- Must be done in collaboration with your business
 partners
- If something is important to the business it can be observed. If it can be observed, it is measureable!
- Understanding 'measurement'; reducing uncertainty, not necessarily an exact value
- Object of Measurement; often too ambiguously defined
- Methods of Measurement; become familiar with multiple methods and apply in the right context



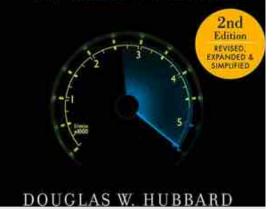


Great point of initial inspiration ...

- Formalizing stuff forces clarity
- Special shout out to Chapter 7
 - Measuring the value of information
 - ISBN: 0470539399
 - http://www.amazon.com/ How-Measure-Anything-Intangibles-Business

How to Measure Anything

FINDING THE VALUE OF "INTANGIBLES" IN BUSINESS



- data

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The Correct Concept of Measurement



- As far as the propositions of mathematics refer to reality, they are not certain; and as far as they are certain, they do not refer to reality
 - Albert Einstein
- **Measurement**: A quantitatively expressed reduction of uncertainty based on one or more observations
 - Not elimination of uncertainty
- This means:
 - Measurements do not need to be precise
 - Measurement is information [information theory]



Defining the Object of Measurement



- A problem well stated is a problem half solved
 - Charles Kittering
- What do you mean exactly (mentorship)?
- Clarification Chain
 - 1. If it matters at all, it is detectable/observable
 - 2. If it is detectable, it can be detected as an amount (or range of possible amounts)
 - 3. If it can be detected as a range of possible amounts, it can be measured
- For example:
 - Measure the value of crime reduction
 - Build me a business case for a specific biometric identification systems for criminals



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Methods of Measurement

- Very small random samples
 - Useful in the face of great uncertainty
- Populations you will never see all of:
 - Number of attempts that go undetected
- Risk of rare events
 - Decision makers can be informed through observation and reason
- Subjective preferences and values
 - The value of art, free time, risk reduction



Enrico Fermi (Nobel Prize Physics 1938)



- How many piano tuners in the city of Chicago?
 - Count them all (yellow pages, licensing agency)
 - Current population of Chicago (3 million at the time)
 - Average number of people per household (2 or 3)
 - Share of households with regularly tuned pianos (1 in 3)
 - Required frequency of tuning (1/year)
 - How many pianos can a tuner tune daily? (4 or 5)
 - How many days/year are worked (250)
- Tuners in Chicago = Population/people per household X % households with tuned pianos X tunings per year/ (tunings per tuner per day X workdays/year)



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Example: Measuring Business Value-1

- \$1billion (+) chemical company
- Develops/manufactures additives enhancing the performance of oils and fuels ...
- ... to enhance engine/ machine performance
 - Helps fuels burn cleaner
 - Engines run smoother
 - Machines last longer
- Tens of thousands of tests annually
 - Test costs range up to \$250,000!



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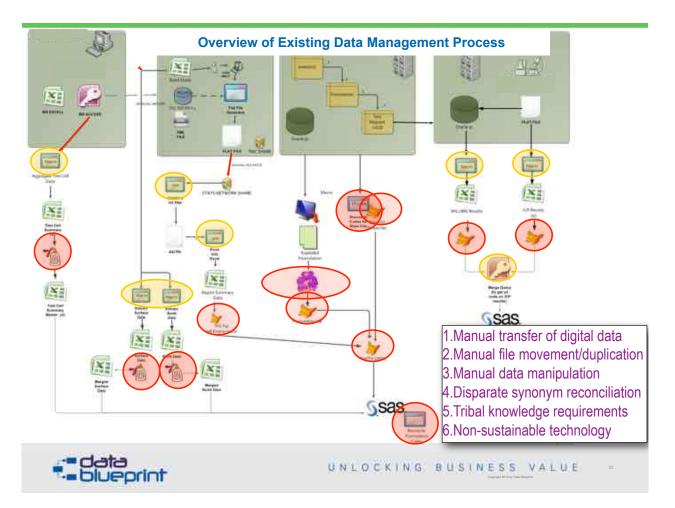
Example: Objects of Measurement & Metrics-2

- Test Execution: Number of tests per customer product formulation. Grouped by product types and product complexity.
- Customer Satisfaction: Amount of time to develop a certified custom formulated product; time from initial request to certification
- Researcher Productivity: Tested and certified formulations per researcher

Note: Baseline measures were taken from historical data and anecdotal information



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Solution and Business Value Results

- Solution:
 - Business process improvements
 - Data Architecture Development
 - Data Quality Improvements
 - Integrated System Development
- Results:



- Reduced the number of tests needed to develop products
- Increase the number of tests per researcher
- Reduce the time to market for new product development
- According to our client's internal business case development, they expect to realize a \$25 million gain each year thanks to this data integration

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Summary – Measuring Business Value

- If it's important to the business, it's measureable
- Learning to measure business value requires:
 - Understanding fundamentally what it means to 'measure'
 - Being clear about what is going to be the object of measurement and the specific metrics
 - Methods that will ensure the metrics captured are meaningful and consistent
- The old adage "if you don't measure it, it can't be managed" is true

Next Step:

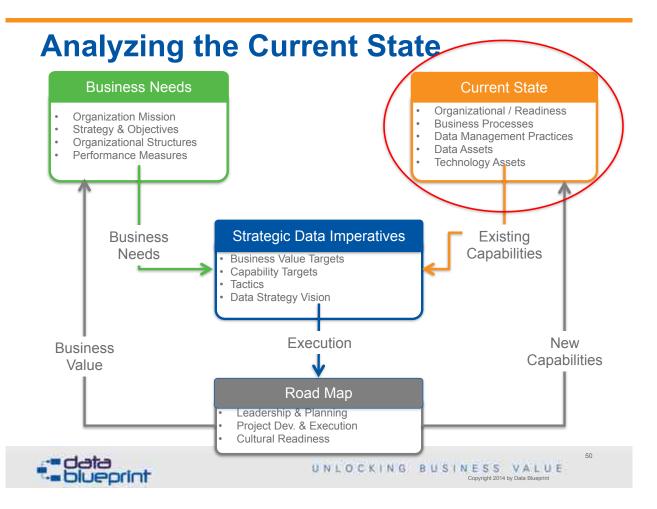
• Develop a holistic solution and approach to address the business needs identified in the data strategy



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Analyzing the Current State

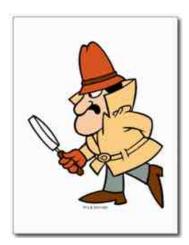


Why we are analyzing the current state...

- Identify existing assets & capabilities
- Identify gaps in assets & capabilities
- Identify constraints & interdependencies
- Measure Cultural Readiness
- •Measure what is achievable

data

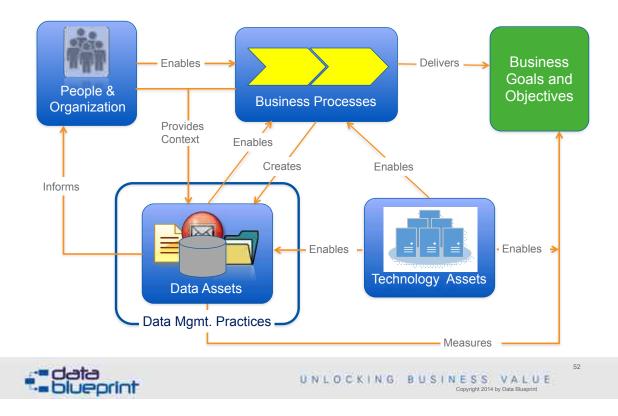
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Analyzing the Current State (ACS)-2



Current State: Organization

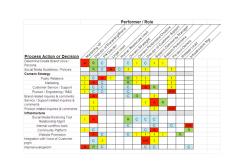
Organizational Structures

Understand roles, responsibilities, authority & accountability

- Reporting Structures
- Governance Structures
- Matrix (e.g. Project) Structures
- Assess Skills Across Business, Data & Technology •
 - Foundational Data skills (CDMP)
 - Subject matter expertise (SME)
 - Technology skills

olueprint

- Business process skills (Six Sigma)
- Change management skills



International Concern

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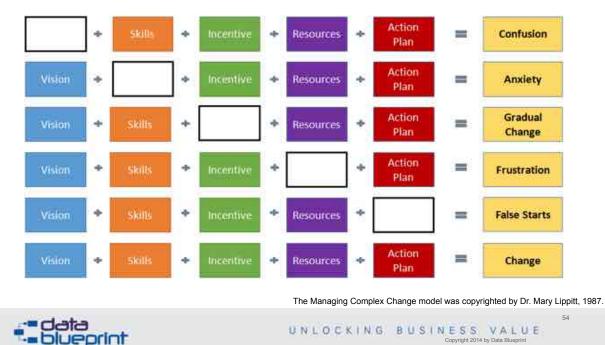
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Current State: Cultural Readiness



Culture is the biggest impediment to a shift in organizational thinking about data





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Construction of the

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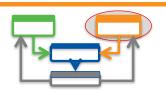
[PRODUCT]

1.000

COMPS.

NOW

Current State: Business Process



What we are looking for...

- Process flow diagrams
- Process actors, including data creators & consumers
- Pain points
- Existing performance measures

Why we want to look at business processes...

- Where business value is realized
- Most important events in the life of data (Dr. Tom Redman)
- Describes the activities underpinning the competitive advantage

-data

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Current State: Business Process

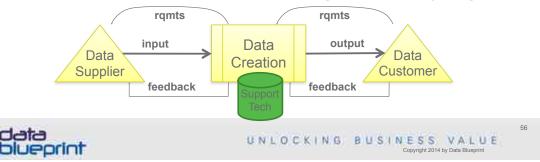


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A CRUD Matrix captures current state processes and their impact on data. Specifically, data creation and consumption.

Entity Process	Customer	Customer Order	Customer Account	Customer Invoice	Vendor Invoice	Product
Receive CustomerOrder	R	С				
Process Customer Order	CRU		RU			R
Maintain CustomerOrder	U		U	1	RU	
Terminate CustomerAccount	U		U		RU	
Fill Customer Order	RU	1	RU		1	RU
Ship Customer Order		ļ.	U	Į I I I I	с	

How well this process is known & managed tells "everything"



Current State: Data Management Practices



Why we want to look at Data Management Practices...

- · Where the data management practices are deficient, surely the data will be as well
- Published by DAMA International
 - The professional association for Data Managers (40 chapters worldwide)
- DM BoK organized around

data

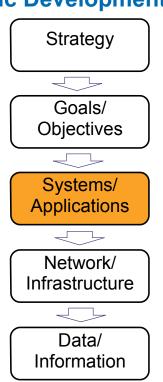
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 Primary data management functions focused around data delivery to the organization

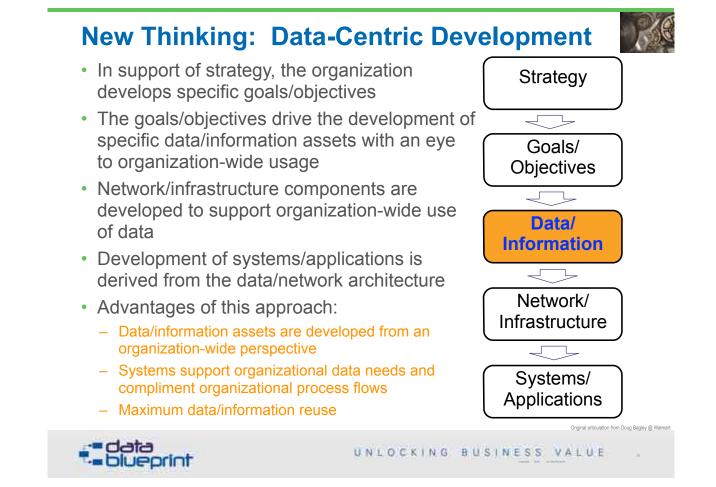


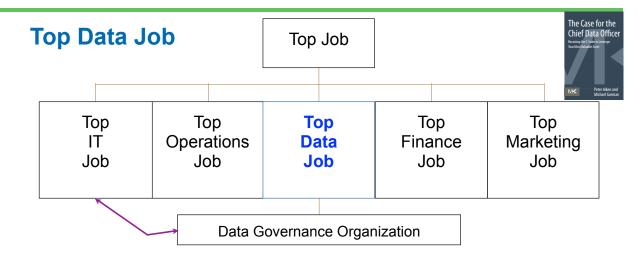
Typical Thinking: Application-Centric Development

- In support of strategy, organizations develop specific goals/objectives
- The goals/objectives drive the development of specific systems/ applications
- Development of systems/applications leads to network/infrastructure requirements
- Data/information are typically considered after the systems/applications and network/ infrastructure have been articulated
- Problems with this approach:
 - Ensures data is formed to the applications and not around the organizational-wide information requirements
 - Process are narrowly formed around applications
 - Very little data reuse is possible



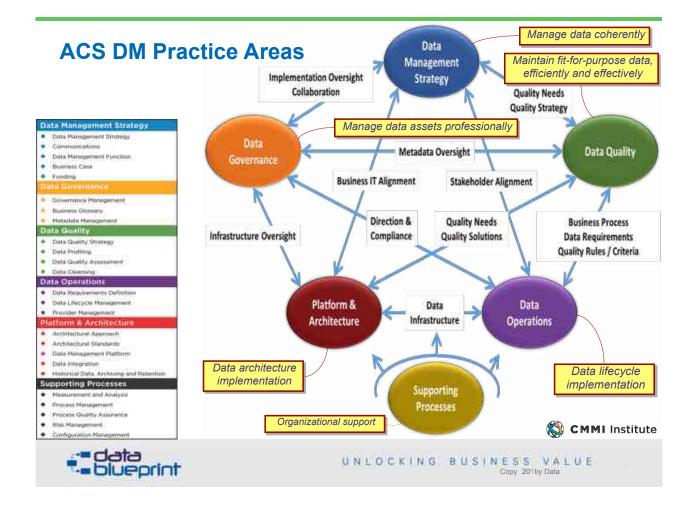




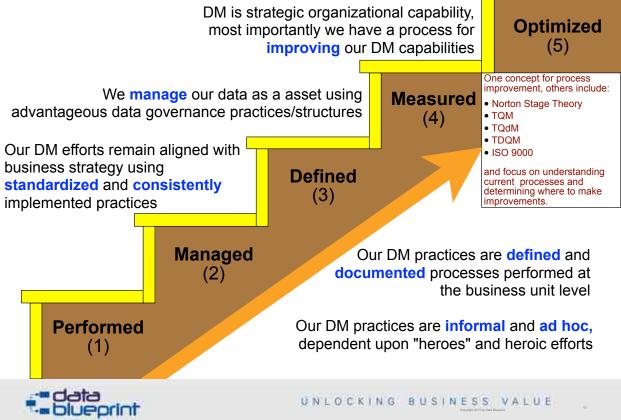


- Dedicated solely to data asset leveraging
- Unconstrained by an IT project mindset
- Reporting to the business
- There is enough work to justify the function and not much talent
- The CDO provides significant input to the Top Information Technology Job
- 25 Percent of Large Global Organizations Will Have Appointed Chief Data Officers By 2015 Gartner press release. Gartner website (accessed May 7, 2014). January 30, 2014. http://www.gartner.com/ newsroom/ul/2552157
- By 2020, 60% of CIOs in global organizations will be supplanted by the Chief Digital Officer (CDO) for the delivery of IT-enabled products and digital services (IDC)





DMM Capability Maturity Model Levels





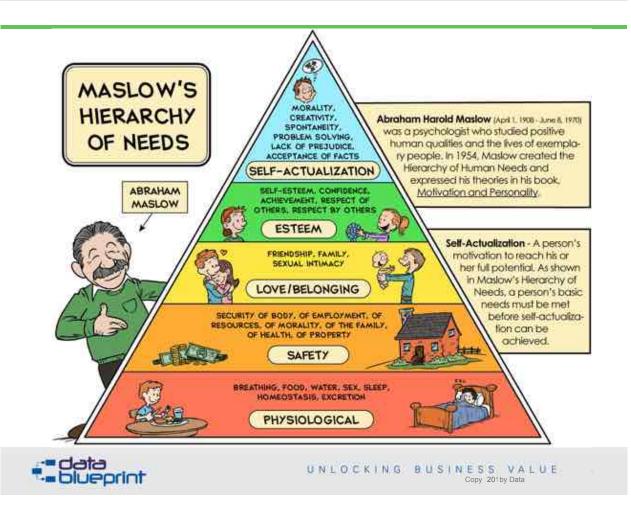
Assessment Components

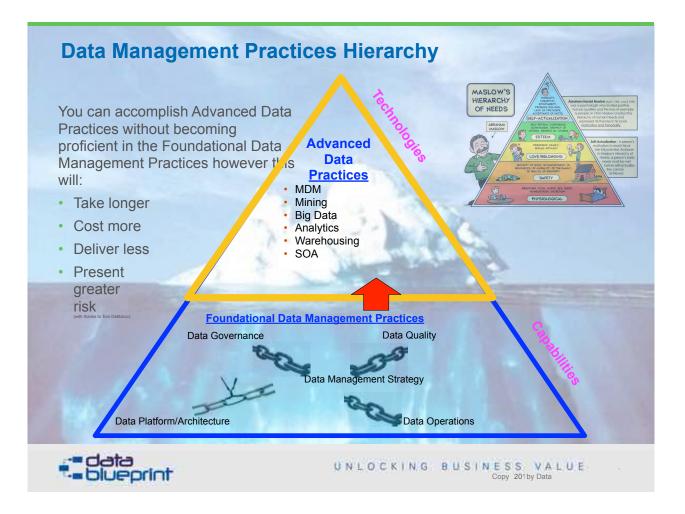


Data Management Practice Areas			Capability	Examples of practice		
Data Management Strategy	DM is practiced as a coherent and		Maturity Model Levels	maturity		
	coordinated set of activities		1 – Performed	Our DM practices are ad hoc and dependent upon "heroes" and		
	Delivery of data is			heroic efforts		
Data Qualitysupport of organizational objectives - the			2 – Managed	We have DM experience and have the ability to implement disciplined processes		
	currency of DM			We have standardized DM		
Data Governance Designating specific individuals caretakers for certain data			3 – Defined	practices so that all in the organization can perform it with uniform quality		
Data Platform/ Architecture	Efficient delivery of data via appropriate channels		4 – Measured	We manage our DM processes so that the whole organization can follow our standard DM guidance		
Data Operations	Ensuring reliable access to data		5 – Optimized	We have a process for improving our DM capabilities		



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Avoid One Legged Stools – over relying on technology





Governance is the major means of preventing over reliance on one legged stools!



Current State: Data Assets

What we are looking for....

- Inventory of assets
- Shadow data solutions
- Organization of data assets (Architecture)
- Specific pain points
- Information capabilities (through
- a business lens)
- Methods for data integration
- Controls for data sharing





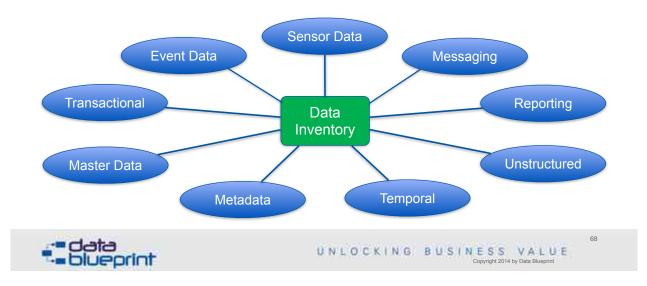
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Current State: Data Assets



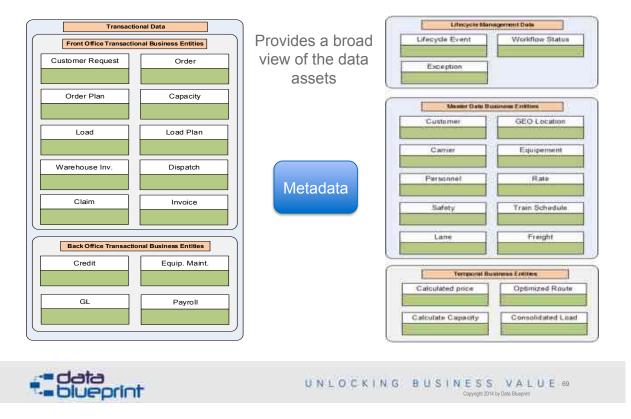
67

- · Eating the data inventory "Elephant"
 - Id what's important
 - De-prioritize the Data ROT (Redundant, Obsolete, Trivial)
 - Organize thinking into data 'roles'





Business Entity Inventory Example

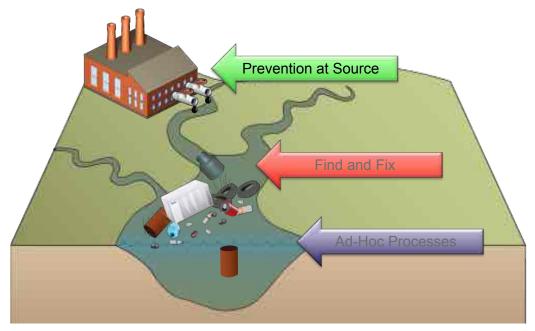


Current State: Data Asset Example Customer Credit Custo ‡ \$ Co modity Product Tende Service **b****** Accounts ice / Rate Receivable Freight Claim Orde Custome invoice G Charl of Order Plan Geo Location Accounts 8 Workforce Payroll Acco Pay Capacity Phi ř Load 1100 . . Ŧ Load Plan Equipment Maintenance Equ Human Resources (HR) Safety ľ۴ in. We ry Policy Regula Carrier Rail Schedule Dispatch



70

ACS: Data Assets – Data Quality Considerations



An interpretation from Dr. Tom Redman's 'Three Approaches to Data Quality'



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Current State: Technology Assets & Practices



71

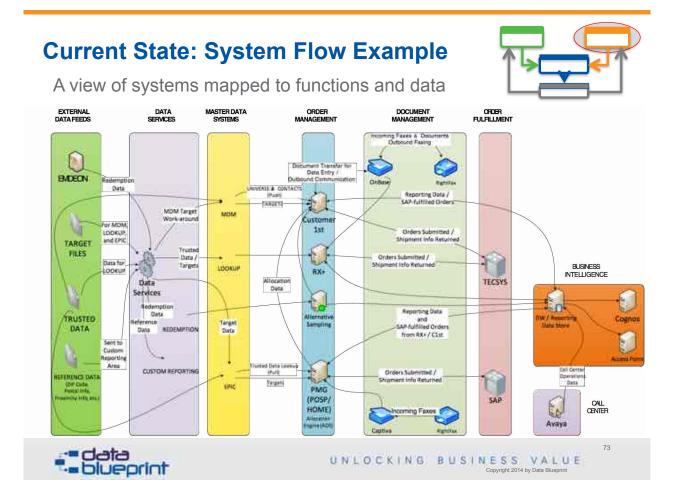
Technology Assets...

- •Systems & System Flows (Architecture)
- •Shadow Systems
- •Technologies, Platforms, Language Standards
- •What's Legacy, what's permanent 'temporary', what's new
- •Traceability to data and business processes

Technology Management Practices...

- •System Development Lifecycle
- •Governance & Production Support Practices
- •Project and Program Management Practices



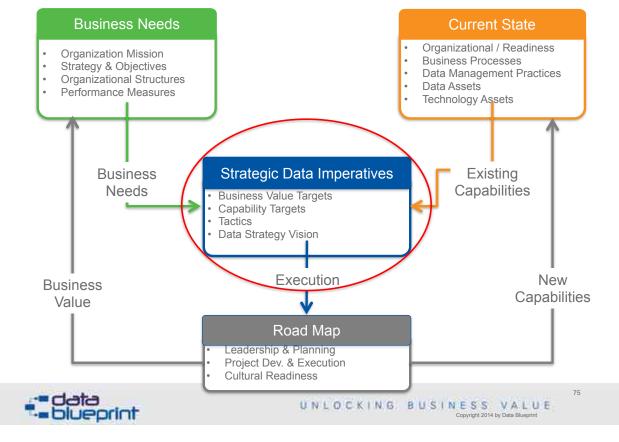


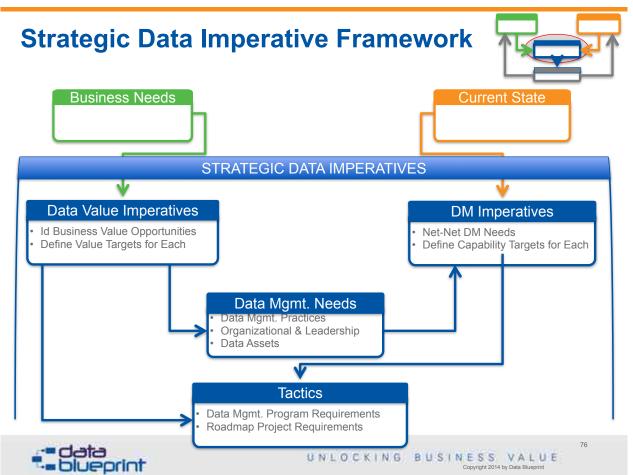
Outline

- Data Strategy Overview
- Determining the Business Needs
- Target Measurement & Success Criteria
- Current State Analysis
- Developing the Strategic Data Imperatives
 - Business Value Targets
 - Data Management Capabilities
 - Tactics/Vision
- Developing a Roadmap
- Q&A



Strategic Data Imperatives



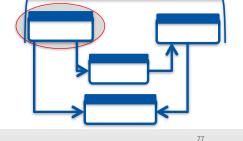


Finding Data Value Opportunities

- Transparency
- Inefficiencies
 - Checking & fixing

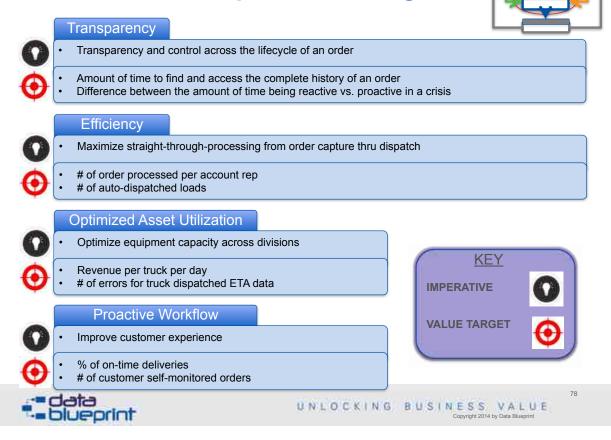
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- Finding & Accessing
- Sharing & Controlling
- Proactive Workflows & Decision Making
- Measuring Outcomes & Performance
- Optimizing Asset Utilization
- Predictive and 'what-if' Planning



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Define Data Value Imperatives & Targets

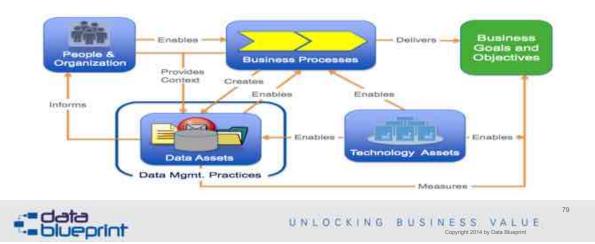




Data Management Capability Needs



- Function of Value Imperatives & Targets
- At the core Architecture, Quality & Leadership
- Dimensions of Foundational & Technical Capabilities
- Think about DM needs broadly...follows current state assessment framework



Capability Needs: Data Management Practices



- Foundational Data Management Practices
 create infrastructure that
 enables long-term DM
 capabilities
- <u>Technology Data</u>
 <u>Management Practices</u>
 deliver focused solutions in
 direct support of tactics



Foundational Practice Capabilities



- <u>Governance</u>: Little 'g' approach where it matters the most.
- <u>Data Strategy</u>: Top-down approach. Cannot dabble, must commit!
- <u>Data Architecture</u>: Organizing data assets based on business needs, not systems or applications.
- <u>Data Education</u>: Changing organizational thinking about data.



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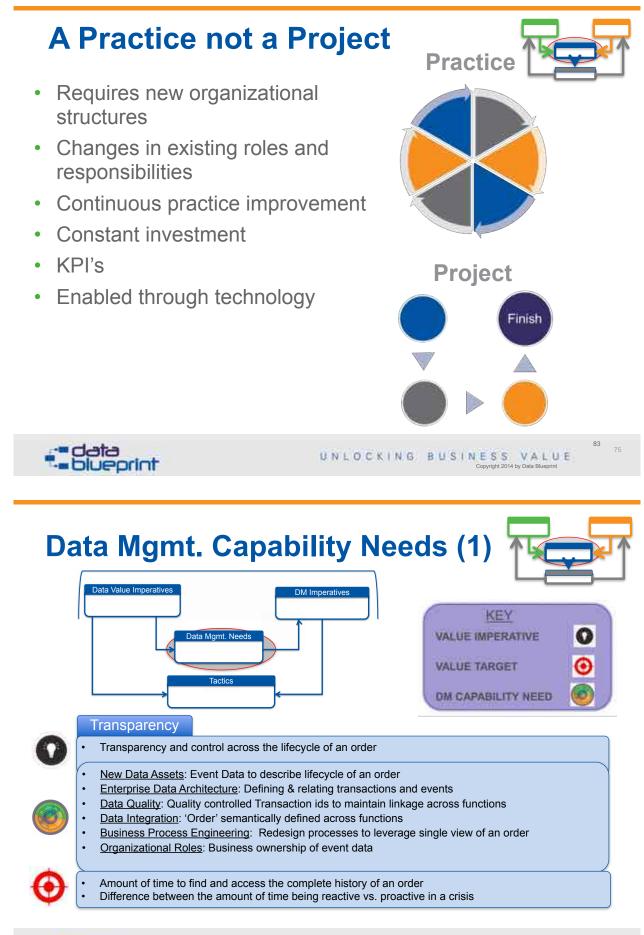
Technical Practice Capabilities

- Data Quality:
 - Focus on most important data
 - Address root cause issues
 - Data correct first time

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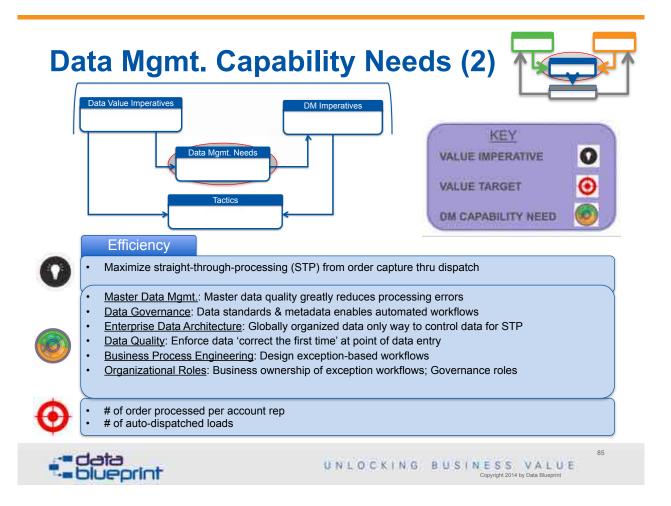
- Data Integration:
 - Support multiple data uses
 - Requires a common language and semantic understanding
- Data Platforms:
 - Engineering/architectural & holistic systems thinking
 - Decouple functionality
 - No one data platform can do it all
- Business Intelligence:
 - Highly dependent on quality, metadata & integration
 - Exploratory in nature
 - Small 'failures' and on-going learning
 - Often exists in spread-marts and shadow IT solutions





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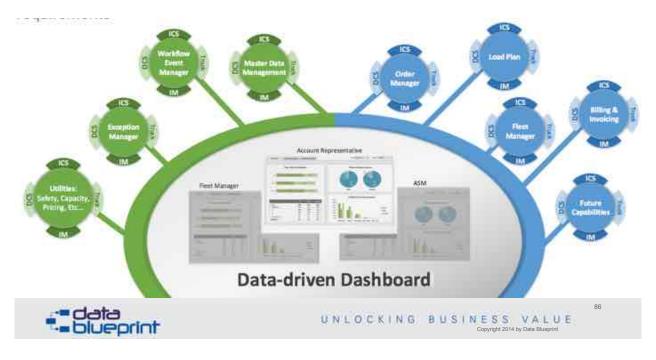


Vision of the Future



A Vision that enables efficiency, transparency, control, stability and integration across the enterprise

while also allowing the flexibility of each division to meet their own, specific requirements



Detailed Vision

- Efficiency
- Transparency
- Control
- Stability
- Integration
- Across the enterprise

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Capability Imperative: People & Organization

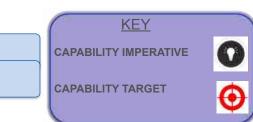


88



Skills & Experience

- Acquire new and further develop existing skills
- Data training provided across business, IT & data teams
 Hire and/or rent talent





Capability Imperative: Data Mgmt. Practices



Data Quality



- Id most important data
- Define and standardize repeatable DQ process
- Train cross functional teams on process
- Set improvement targets and monitored progress

Data Architecture

Organize views of the data assets to convey meaning for multiple business and IT purposes

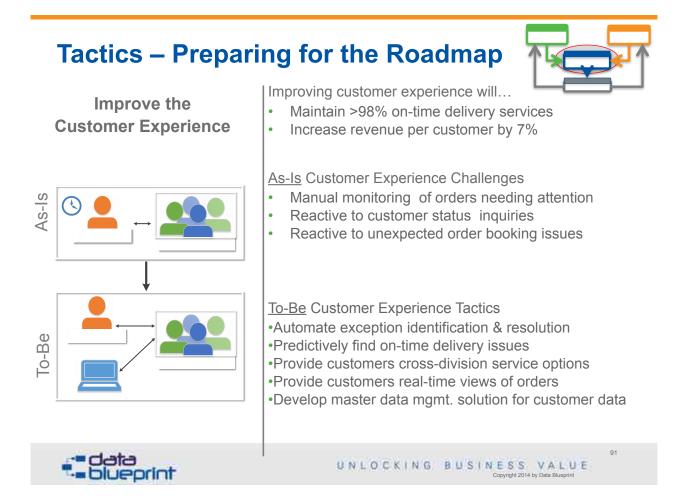
- Business level view provides awareness, participation & responsibility with business roles
 Concentral and logical views anable business, data & IT teams to effectively communicate
- Conceptual and logical views enable business, data & IT teams to effectively communicate
 Data Security can only be effective with a controlled inventory of data assets
 - An operating model for creating and maintaining data architecture



Tactics – Preparing for the Roadmap





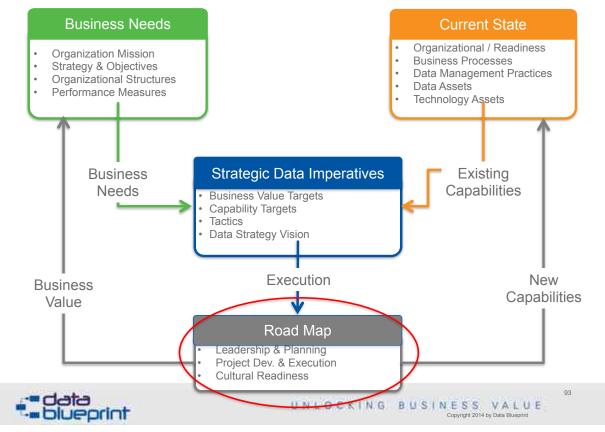


Outline

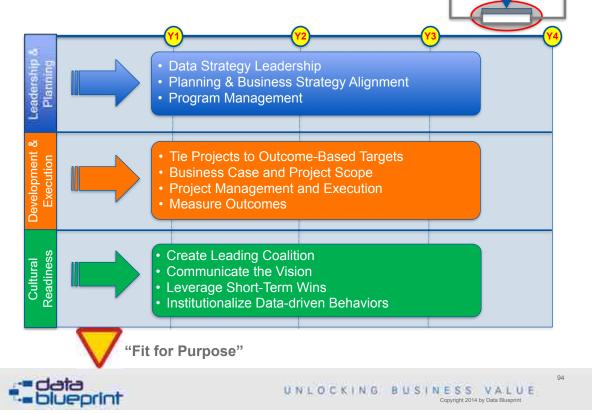
- Data Strategy Overview
- Determining the Business Needs
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- Developing the Strategic Data Imperatives
 - Business Value Targets
 - Data Management Capabilities
 - Tactics/Vision
- Developing a Roadmap
- Q&A



Analyzing the Current State



Roadmap Framework

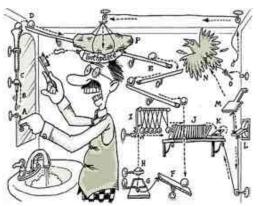


Leadership & Planning



Data Strategy Leadership

- Planning & Business Strategy Alignment
- Program Management
- On-going and iterative activities
- Responsible for other two streams
- Data Strategy Execution accountability and leadership (CDO)
- Adjust strategic imperatives/tactics based on changing business needs
- Manage relationships with business leaders and data strategy program stakeholders

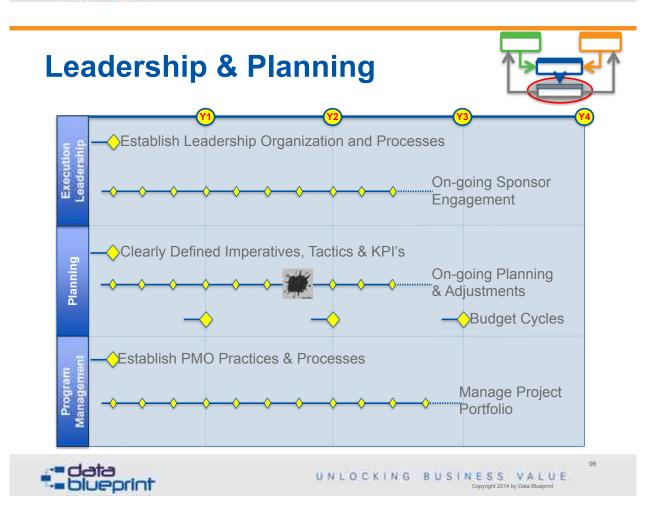


Don't Over-engineer the Process

eadership

Planning

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Project Development & Execution



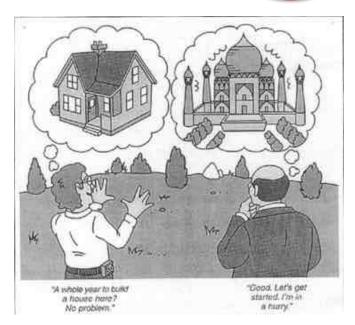
- Project <u>Development</u>
 - Initialize High-level Milestone Targets (value & capability)
 - Define the Initial Set of Projects (6 to 18 months out)
 - Process for Defining Projects (business case & scope)
- Project Execution
 - Define the Project Lifecycle by Project 'Type'
 - Focus on Execution
 - Measuring Outcomes



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Project Development

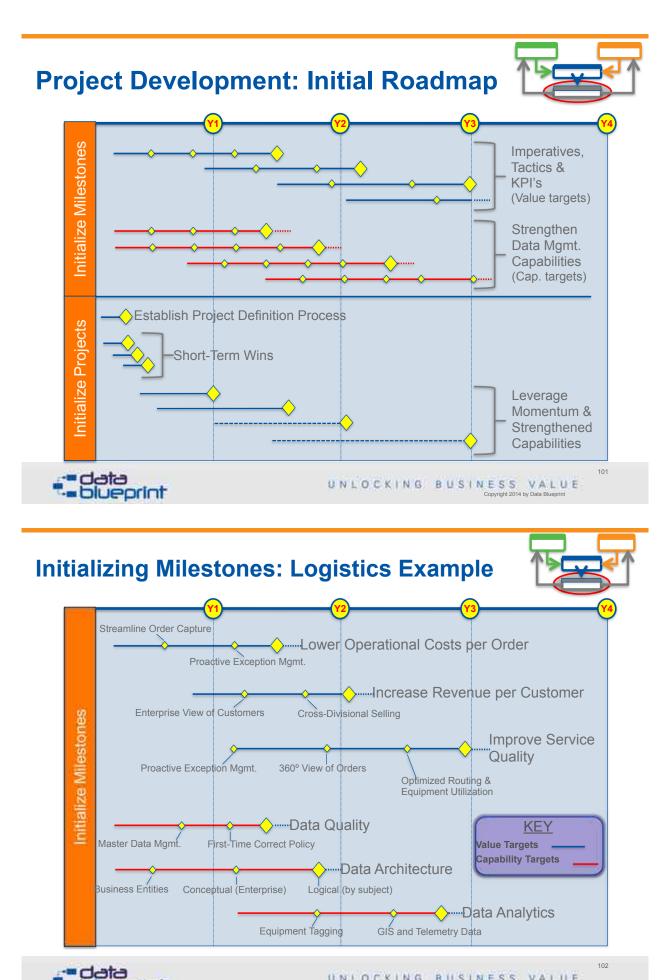
- Initialize Long-term Milestones
- Tie to Strategic
 Imperatives & Tactics
- Initialize Projects to Execute
- Establish On-going Project Definition Process





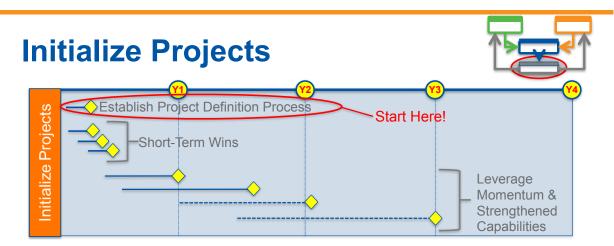


99



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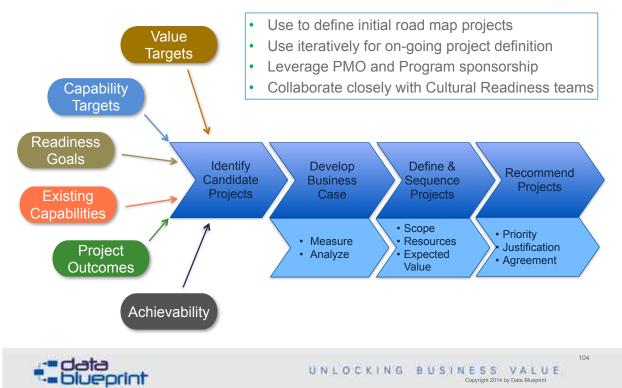
- Repeatable Process for Defining Projects (Initial & On-going)
- Project Definition Process Inputs
 - Milestone Targets (Value and Capability)
 - Cultural Readiness Goals
 - Existing Capabilities (People, Process, Data, Technology and Readiness for Change)
 - Outcomes from Previous Projects

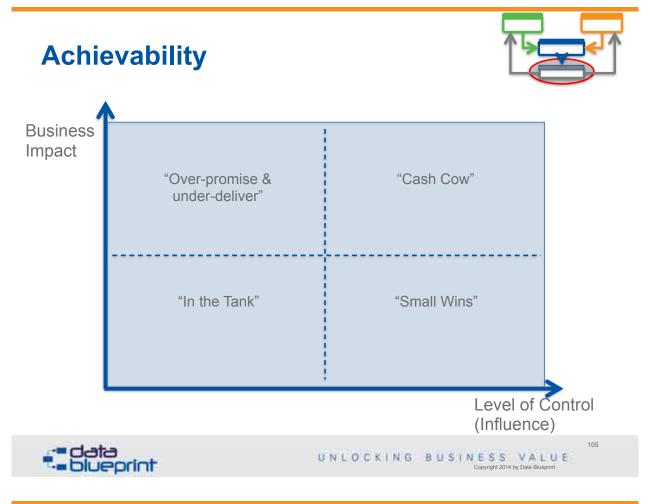
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Project Definition Process



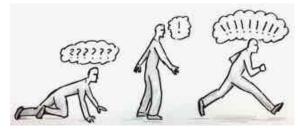




The Approach of Crawl, Walk, Run

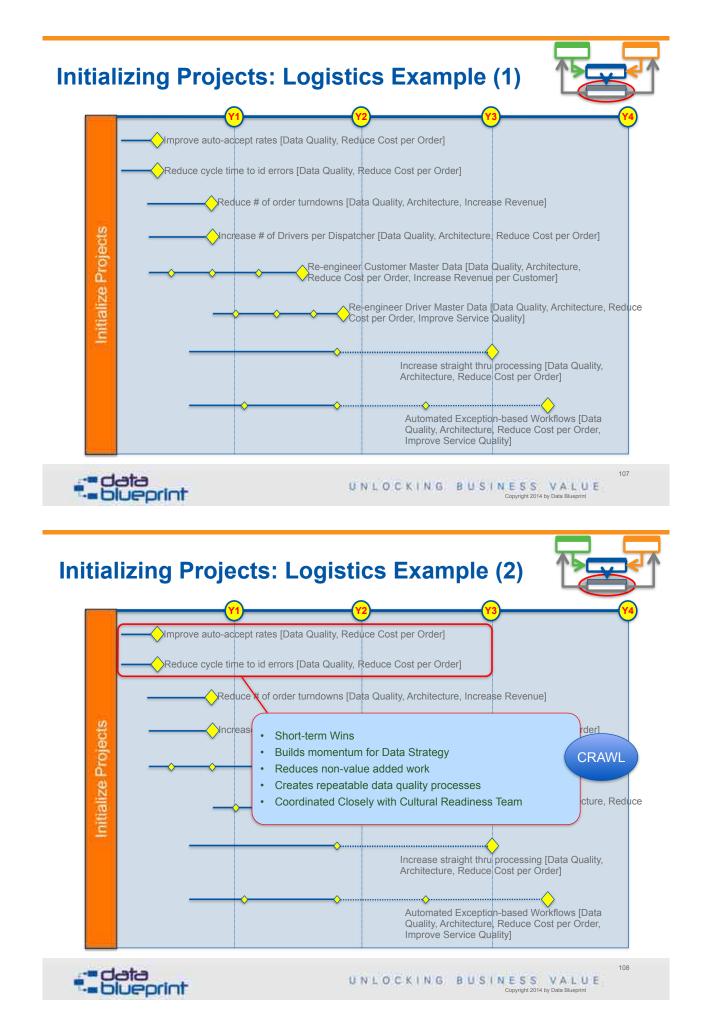


- Crawl:
 - Identify business opportunity and determine a scope that fosters early learning yet delivers measureable value
- Walk:
 - Develop foundational & technical data management practices ensuring they are repeatable. Enlarge the scope of projects that expand capabilities

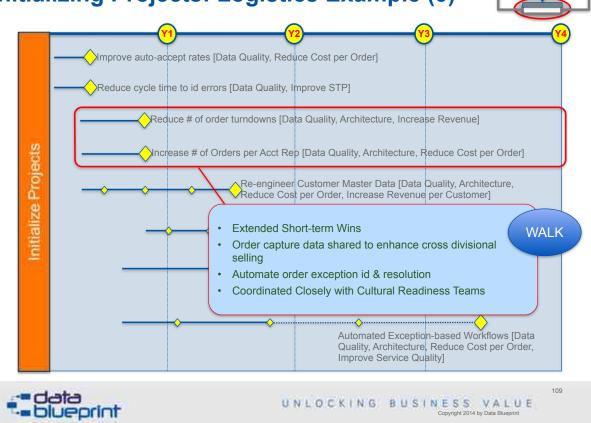


- Run:
 - Continuous improvement and expanded application of maturing data management practices



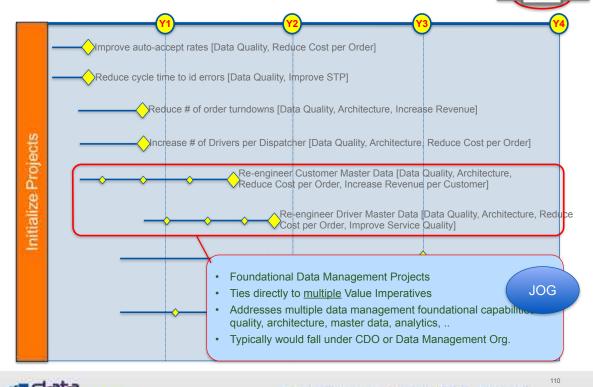


Initializing Projects: Logistics Example (3)

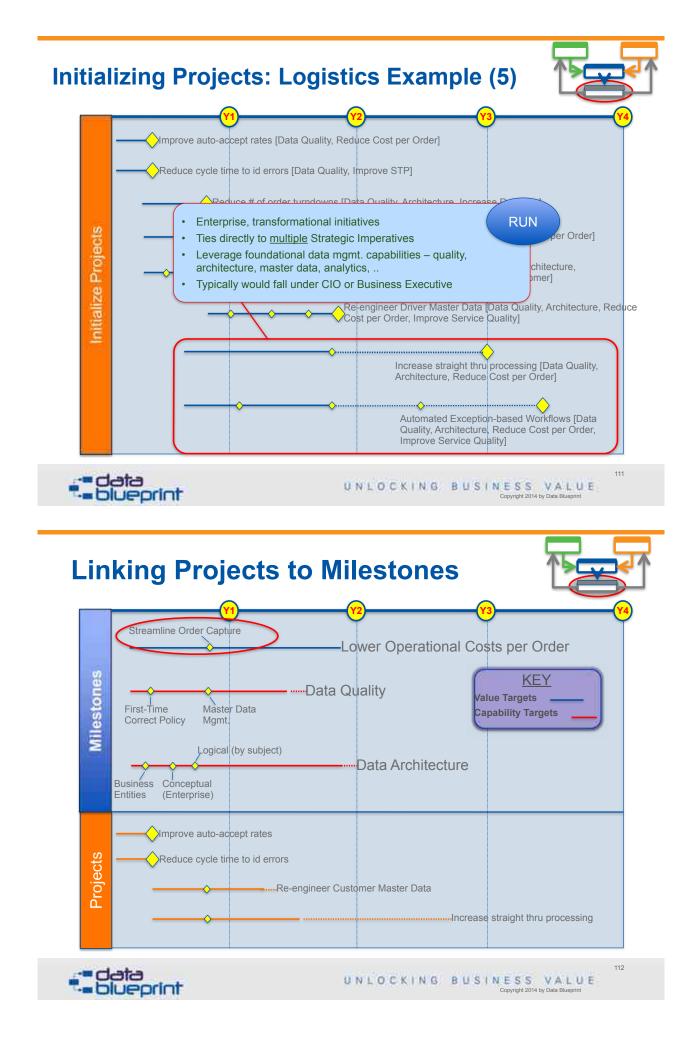


Initializing Projects: Logistics Example (4)

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Summary: Project Development & Execution

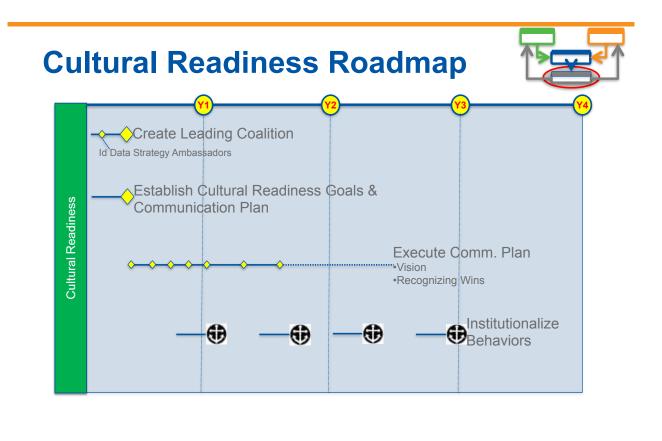


- Projects must balance capability and business value creation
- Mix of projects: short-term wins, foundational data management projects, large enterprise initiatives
- Projects must directly-tie and measurably-support strategic imperatives and tactics
- Take a crawl, walk, run approach to project execution



- Level of effort estimated 5% 10% of total program in the first year
- Cultural change needs often neglected and under-estimated
- Leadership, skills and activities needed are typically missing
- Tie to strategic imperatives and projects; cannot be executed in a vacuum
- "Data-driven" organizations must recognize the need for transformation in attitudes, behaviors, processes, skills and organizational structures







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Cultural Readiness In More Detail (1)



116

115

"The thing I have learned at IBM is that culture is everything." - Louis V. Gerstner, Jr., Former CEO of IBM

- Leading Coalition that can make change happen
 - Find the right people
 - Create trust
 - Common vision
- Establish Goals & Communication Plan
 - Simplified Goals; Appeal to the Head and the Heart
 - Communicate, Communicate, Communicate!



Cultural Readiness In More Detail (2)



- Execute Communication Plan
 - Multiple Forums
 - Repetition
 - Leadership by Example
- Institutionalize Data-driven Behaviors
 - Change comes last, not first
 - Results Dependent
 - May involve turnover



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10 Common Mistakes (1)

- 1. Buy-in but not Committing
 - Responsibility, Accountability but NO Authority
- 2. Ready, Fire, Aim
 - Starts without sufficiently defining the business needs
- 3. Trying to Solve World Hunger or Boil the Ocean
 - "Too big too fast" = Recipe for disaster
- 4. The Goldilocks Syndrome
 - Approach is at one extreme or another; too high-level or too in the weeds
- 5. Committee Overload
 - Avoid too many chefs in the kitchen



118

Source: "Data Governance Worst Practices" by Angela Guess; http://www.dataversity.net/archives/4895





10 Common Mistakes (2)



119 116

120

6. Failure to Implement

- Communicate the vision
- 7. Not Dealing with Change Management
 - Its mostly a people and culture issue
- 8. Assuming that Technology Alone is the Answer
 - Shiny object syndrome
- 9. Not Building Sustainable and Ongoing Processes
 - DG is not a project!

10. Ignoring "Data Shadow Systems"

• Missing the best part



Source: "Data Governance Worst Practices" by Angela Guess; http://www.dataversity.net/archives/4895



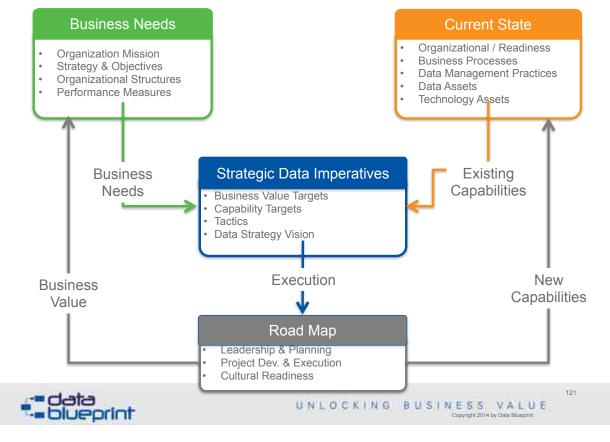
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Conclusion

In Summary....

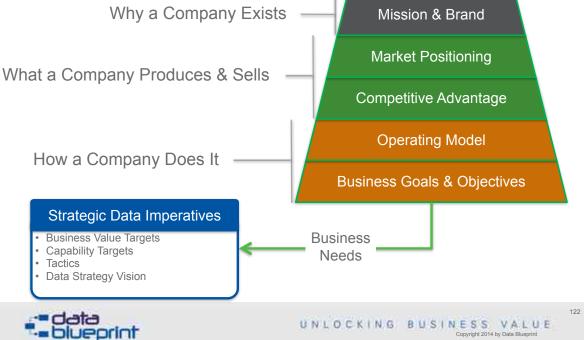


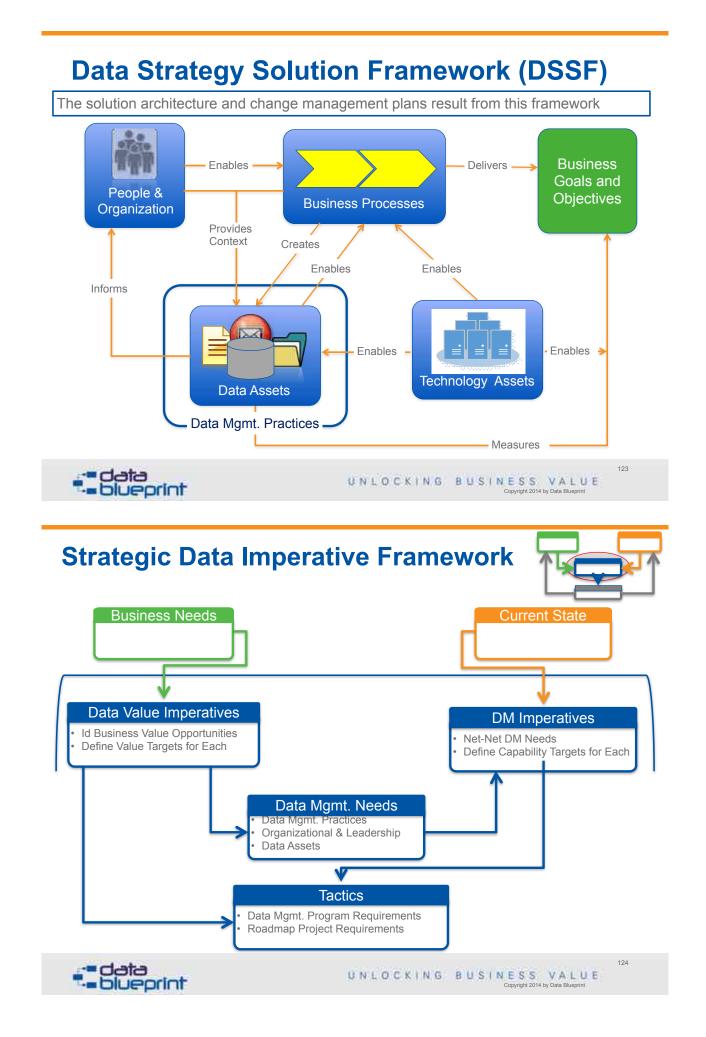
Data Strategy Framework



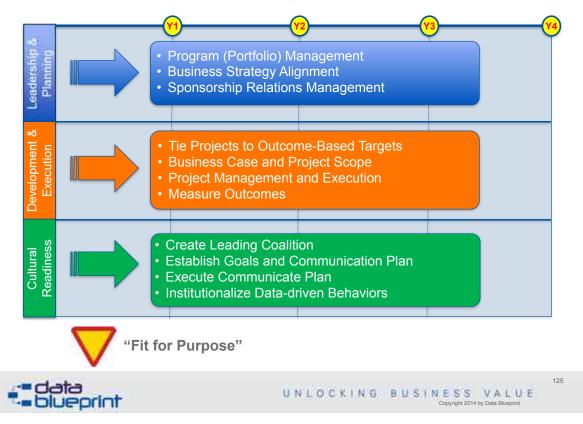
Analyzing the Business







Roadmap Framework



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•Data Strategy 2.0: Focus on the Roadmap and Implementation •3 hour workshop with Lewis Broome

•Addressing Data Challenges using the Data Management Maturity Model

•Melanie A. Mecca, *CMMI Institute* Peter Aiken, *Data Blueprint*

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Upcoming Events

Enterprise Data World, Washington D.C. DATE! March 29 – April 3, 2015 @ 2:00 PM ET/11:00 AM PT

Data Governance Strategies April 14, 2015 @, 2:00 PM ET/11:00 AM PT



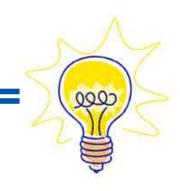


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Questions?







127

128

It's your turn! Use the chat feature or Twitter (#dataed) to submit your questions now.









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