COMPASS & Erwin DI

Cloud Based Automated Data Governance Management System &
Erwin Data Intelligence Suite

- Introduction and Demonstration
- Robert Lutton – Sandhill Consultants
- Jeff Giles – Sandhill Consultants

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Common Understanding of what Enterprise Data Governance is

What is Enterprise Data Governance?

Enterprise Data Governance is a collection of standardized processes, roles, policies, standards, and metrics for formal management of data assets

What does it do?

It's about controlling all outcomes of a data asset (Quality, Security, etc)

Why is it Important?

Enterprise Data Governance leads to Improved Business Outcomes, Reduced Risk, Compliance, and improved quality of decision making

Top 5 Symptoms of Poor Data Governance

I don't trust the data - **Poor data quality**

Who is responsible? - **Deficient ownership of data**

Where is and which version of the data do I use? - **Data silos**

I can't find the data that I need – **Lack of data transparency**

What am I supposed to be doing? - **Lack of data governance & leadership**

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Complex Intersections of People, Process, and Planning

Interconnections of Governance

- Plans for governing work
- People assigned to the work
- Processes that enable the governance
- Factors that measure the outcome of governance

Unique for each organization, driven by organizational goals.

Enterprise Data Governance TIMELINE

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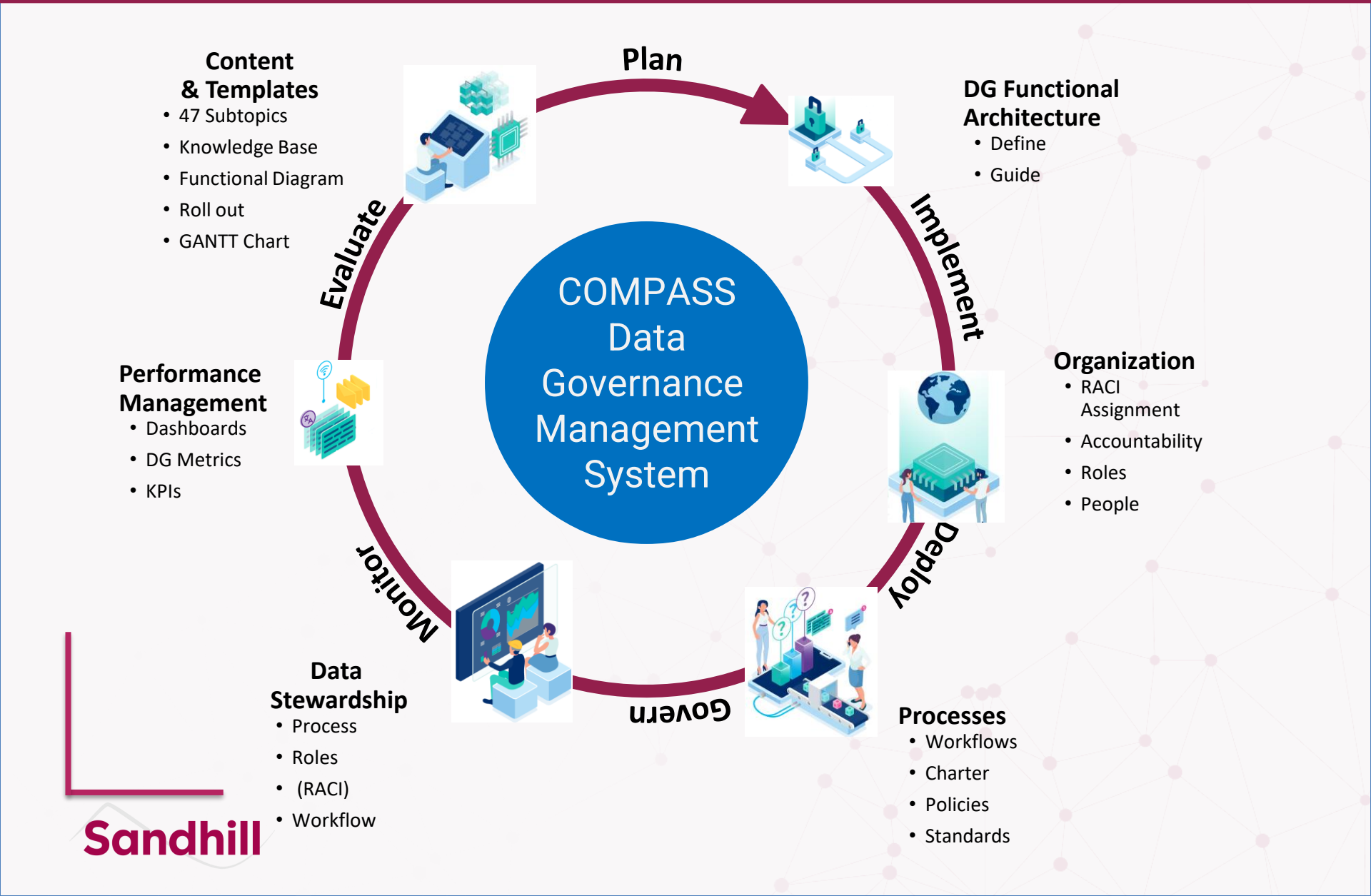
C O M P A S S

Compliance | Organization | Measurement | DG Policy | Data Architecture | DG Standards | DG Stewardship



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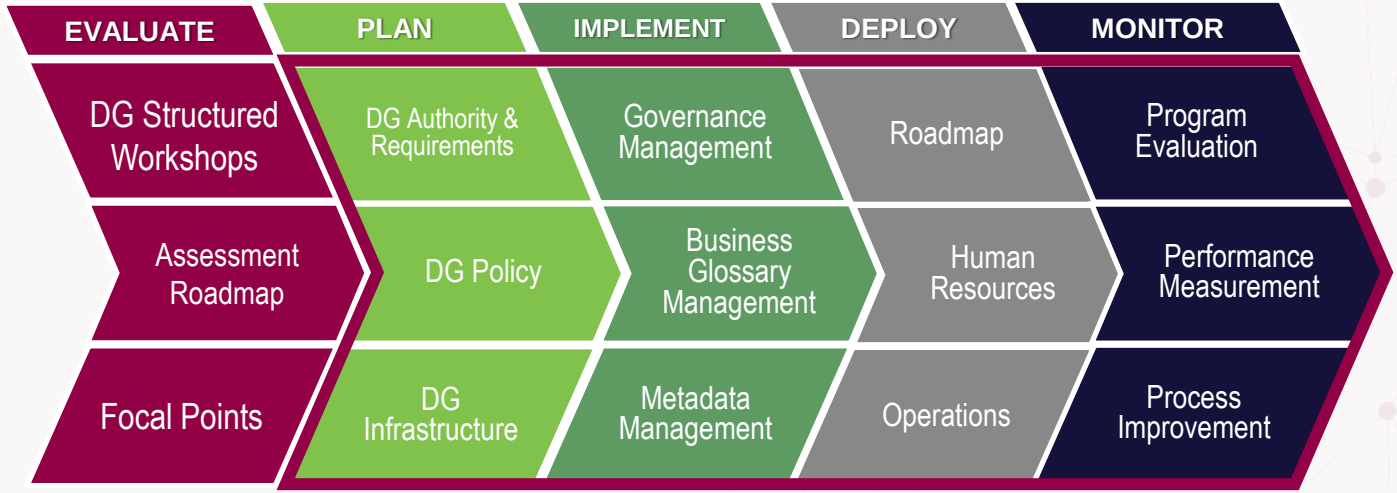
Build vs Buy
Why does COMPASS exist – Why it can help you

Many organizations are looking to for an effective solution to quickly build, improve and measure their enterprise data governance program

Governing the DG Process requires the following



CMMI / DMM Assessment

COMPASS

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COMPASS DEMONSTRATION

See how to use the integrated governance framework assets

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THE DG SCENARIO

The CDO / Data Leader has been tasked with creating a new Data Governance Program to resolve the issues mentioned in our thought bubbles earlier

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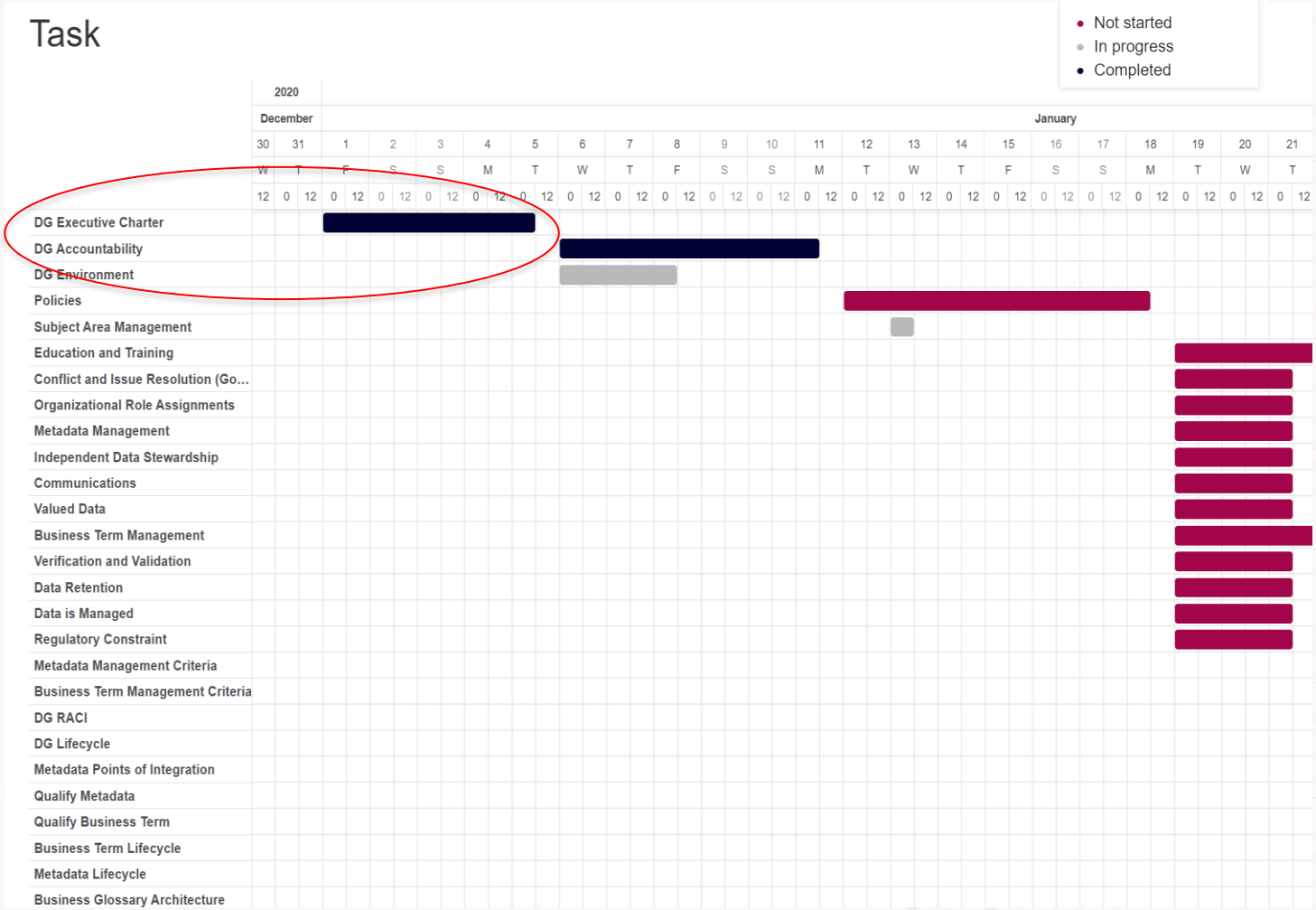
DATA GOVERNANCE PROJECT OVERVIEW



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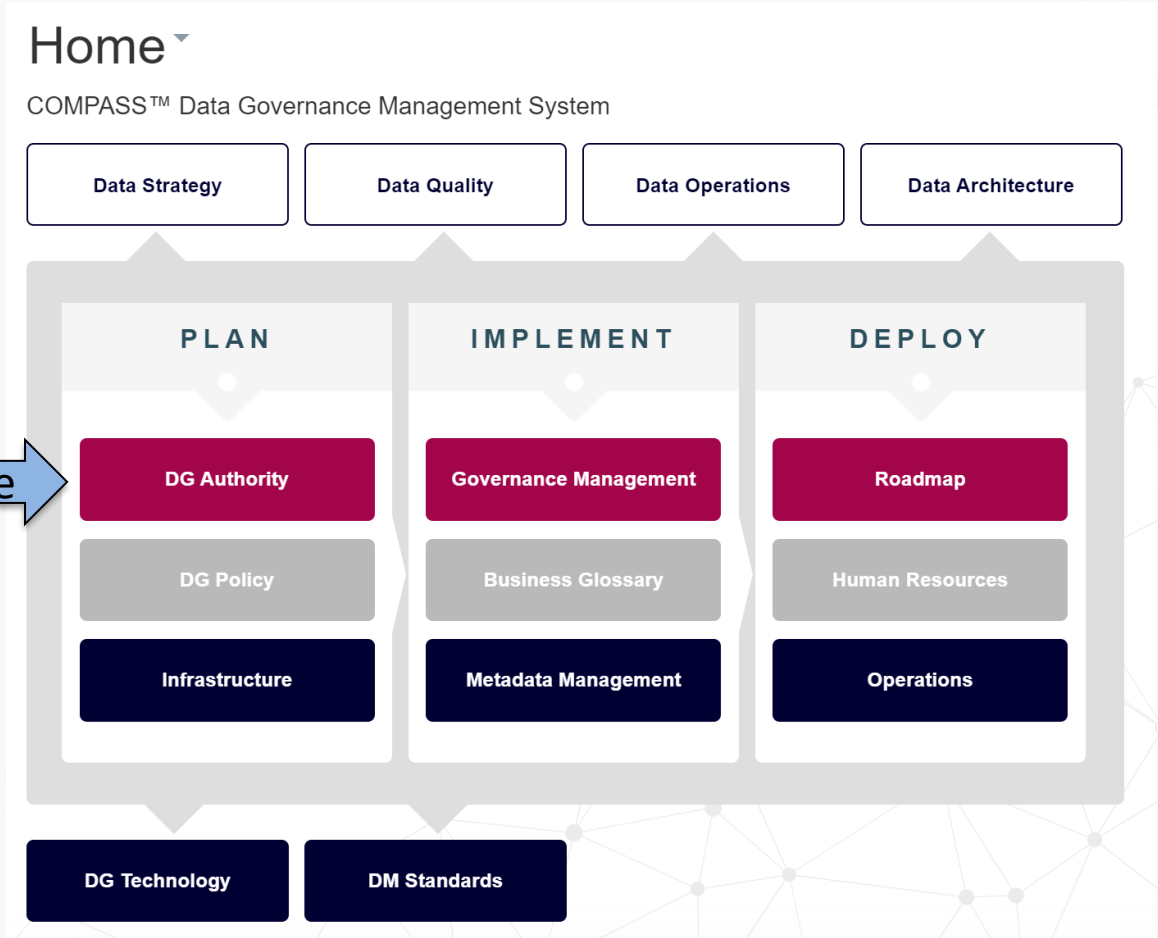
COMPASS HOME

Step 1



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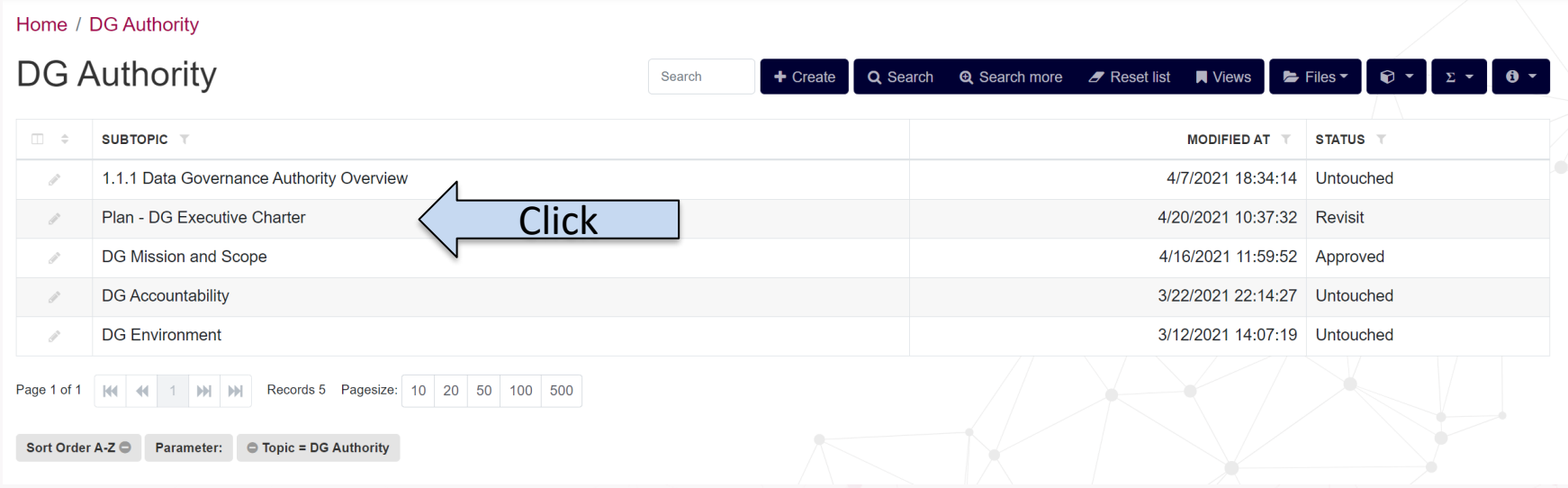
DG AUTHORITY



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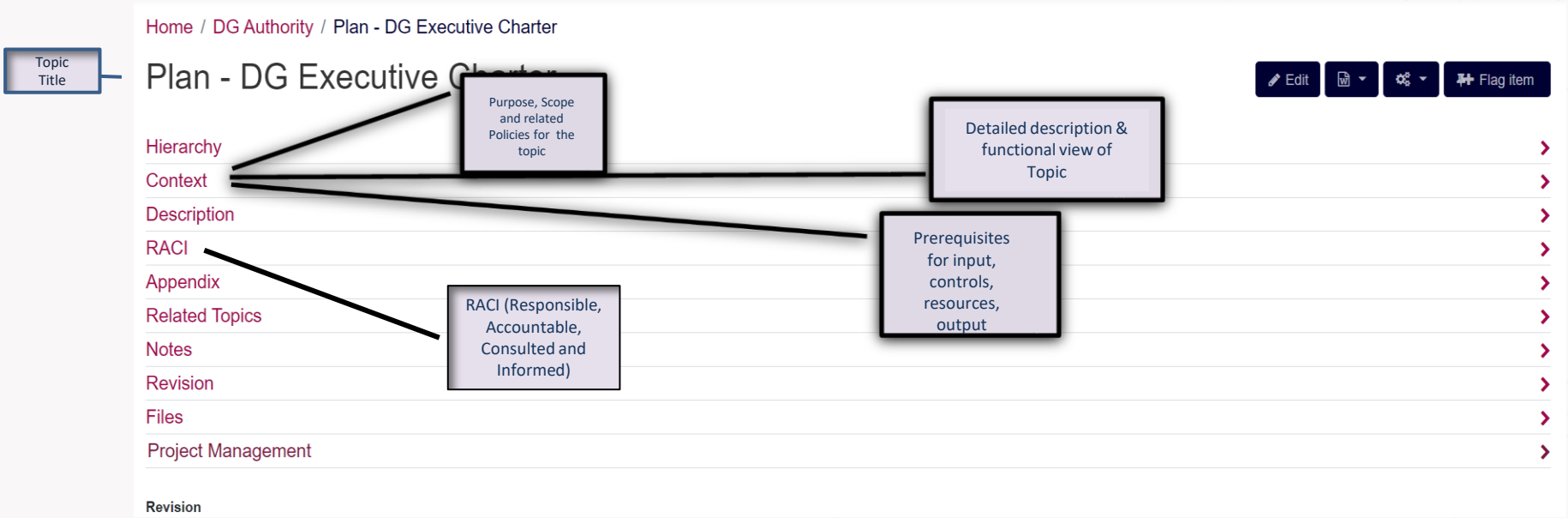
Typical Topic Driven Page – Standard Template



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Typical Topic Driven Page - Description

Topic Title

Plan - DG Executive Charter

Edit | Flag item

Hierarchy

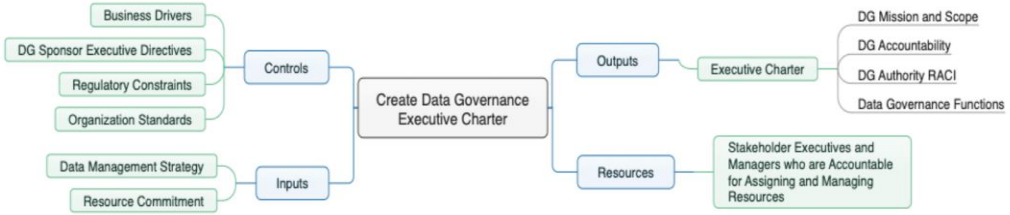
Context

Description

Detailed description & functional view of Topic

Functional View

The Stakeholder Executives and Managers who are accountable for assigning and managing Resources create the Data Governance Executive Charter using the Data Management Strategy and Resource Commitments under the Controls of Business Drivers, DG Sponsor Executive Directives, Regulatory Constraints, and Organization Standards to Authorize the creation of the DG Mission and Purpose, Authority Responsibilities Matrix, and the DG Functions.



1.1.1 DG Executive Charter v5 20210302.mmap.png

Process View

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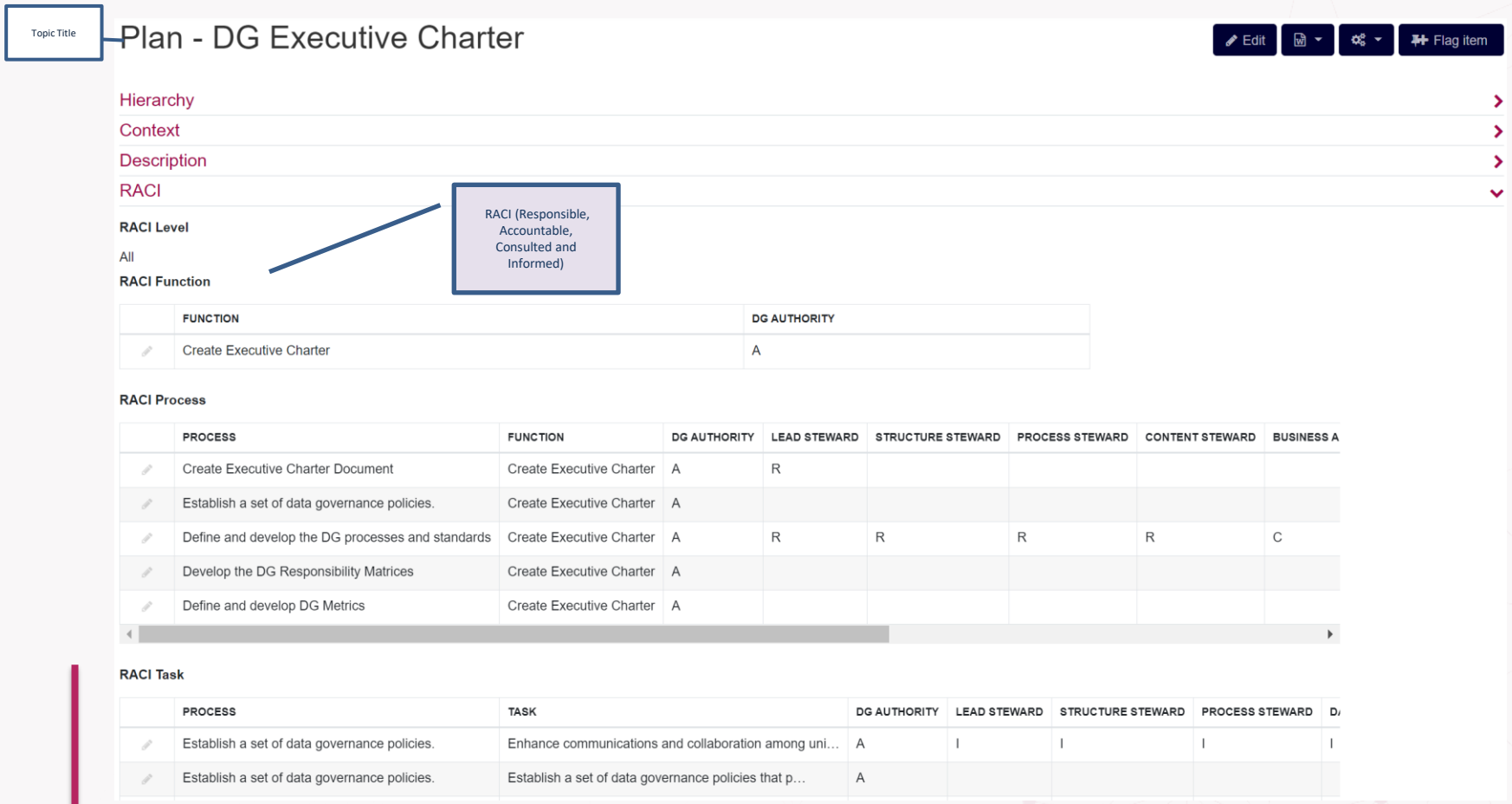
Typical Topic Driven Page -RACI



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POLICY MAP

Home / DG Policy / Data Governance Policy Overview

Data Governance Policy Overview

Edit | Flag item

Hierarchy

Context

Purpose

The purpose of the Policy Overview is to provide a mapping of the Data Governance Policies and their related Subtopics and cross-functional interactions.

Scope

All policies in held in COMPASS.

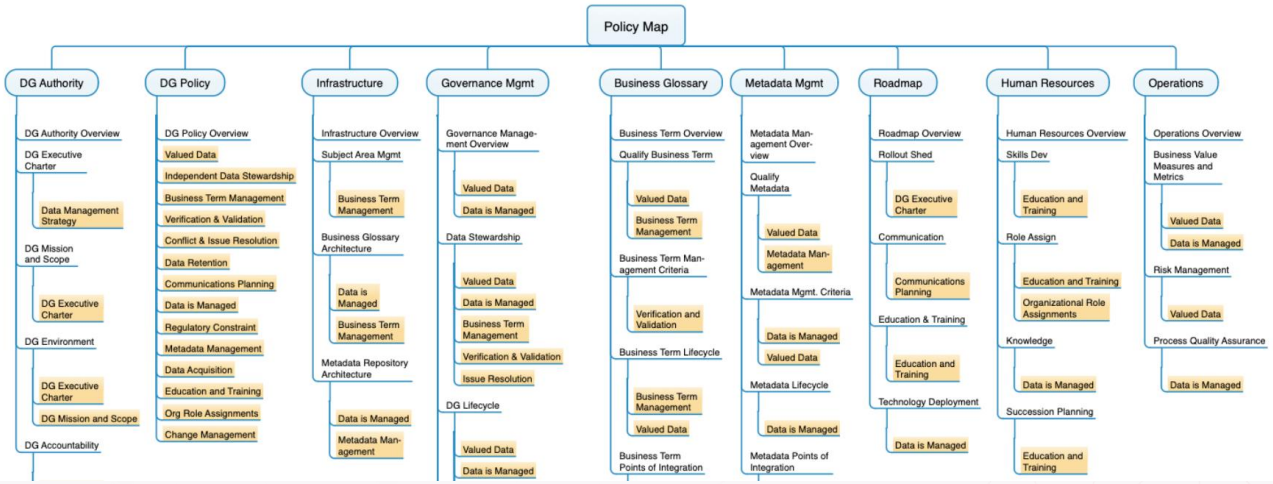
Directives, Policies, and Guidance

The Data Governance Policies are derived from the DG Charter, which is derived from the Data Management Strategy.

Description

Functional View

The following diagram indicates the mapping of the COMPASS Subtopics to to their respective Policies and cross-functional interactions.
The Policy Map should be consulted in the Policy Change process, Risk Management and Impact Analysis tasks. This mapping should be maintained as polices are added, edited, or deleted, to maintain the coherence.



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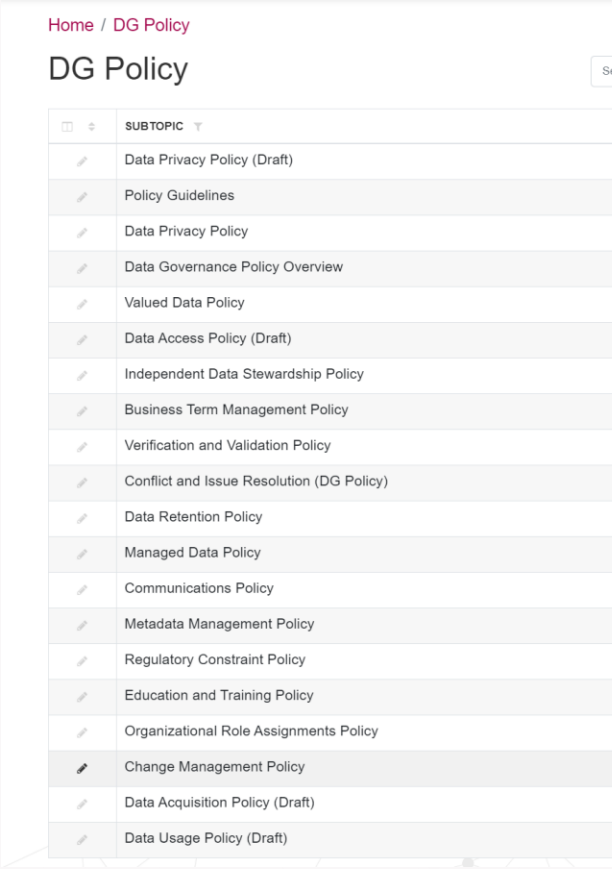
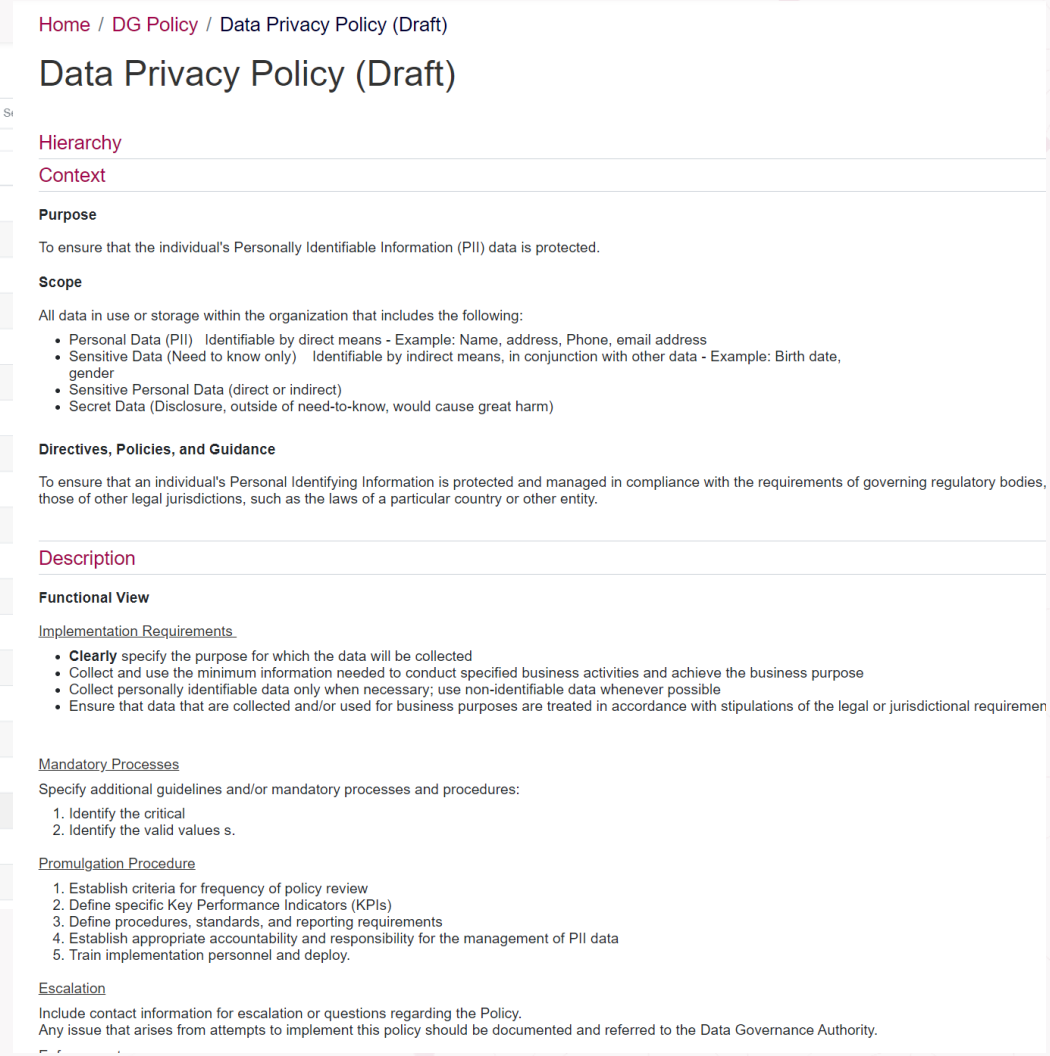
CUSTOMIZABLE CONTENT





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Shared Accountability and Assignments

RACI Level

All

RACI Function

RACI Function

	FUNCTION	DG AUTHORITY
	Create Executive Charter	A

RACI Process

RACI Process

	PROCESS	FUNCTION	DG AUTHORITY	LEAD STEWARD	STRUCTURE STEWARD	PROCESS STEWARD	CONTENT STEWARD	BUSINESS ANALYST	BUSINESS SME	E
	Create Executive Charter Document	Create Executive Charter	A	R					C	
	Establish a set of data governance policies.	Create Executive Charter	A							R
	Define and develop the DG processes and standards	Create Executive Charter	A	R	R	R	R	C	C	C
	Develop the DG Responsibility Matrices	Create Executive Charter	A							R
	Define and develop DG Metrics	Create Executive Charter	A							R

RACI Task

RACI Task

	PROCESS	TASK	DG AUTHORITY	LEAD STEWARD	STRUCTURE STEWARD	PROCESS STEWARD	DATA STEWARD	BUSINESS AI
	Establish a set of data governance policies.	Enhance communications and collaboration among uni…	A	I	I	I	I	I
	Establish a set of data governance policies.	Establish a set of data governance policies that p…	A					
	Define and develop the DG processes and standards	Establish a set of data standards that define the …	A	R				C
	Define and develop DG Metrics	Establish a set of measures and metrics that can b…	A					
	Define and develop the DG processes and standards	Establish data governance processes that enhance o…	A	R				C
	Develop the DG Responsibility Matrices	Identify responsibilities and accountabilities for…	A					
	Establish a set of data governance policies.	Promulgate the concepts of "ownership" and "stewar…	A					
	Establish a set of data governance policies.	Provide periodic evaluation, assessment and recomm…	A					
	Define and develop the DG processes and standards	Provide training for data governance stewards, own…	A					

Responsibility Staffing

	ROLE NAME	PROJECT	USER	STATUS
	DG Authority		Ham Hayes	Proposal
	Lead Steward		Jesper Schneider	Selected
	Chief Data Officer		Ham Hayes	Selected
	Business Manager		Jeff Giles	Selected

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COMPASS Workflows

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Robert Lutton

Home

Workflow Manager

My Open Tasks

Execute Workflow

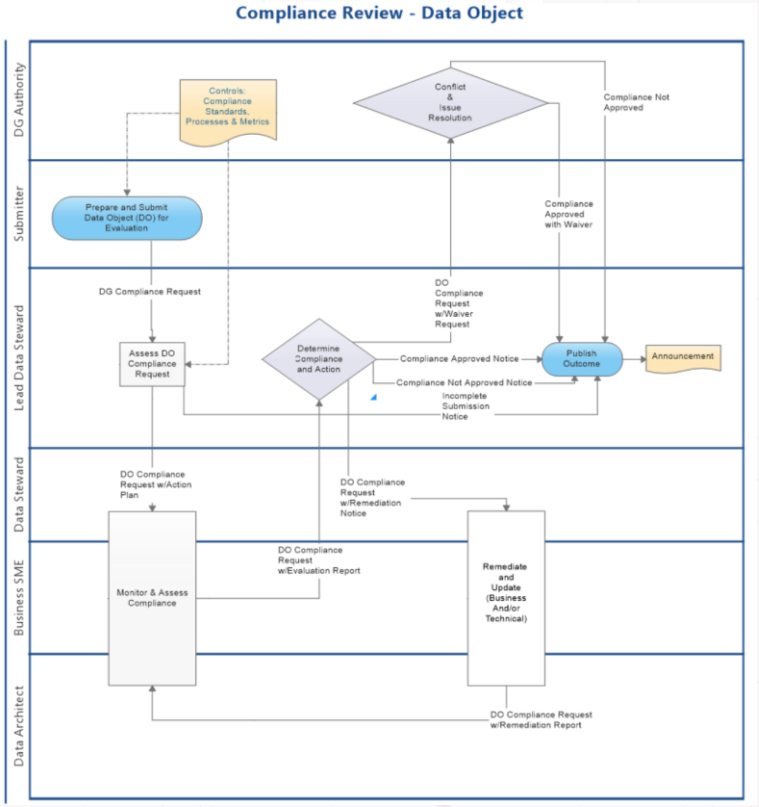
	SUBTOPIC	PROCESS	ACTION
	Standards Change Management	SCM Process	Run workflow
	Policy Change Management	Policy Change Proces	
	Conflict and Issue Resolution (Governance)	Resolve Issue Reques	
	Change Management	Simple Change Approv	
	Change Management	Change Request	
	Data Stewardship	Conduct Compliance F	

Workflow

My Open Tasks (Accountable/Responsible)

	PROCESS	TASK
	Policy Change Process PX0447 Sun Test #1	Review Policy Change Reque
	Policy Change Process PX0446 WF Mod test #1	Review Policy Change Reque
	Policy Change Process PX0445 PubSub #3	licy Change Reque
	Policy Change Process PX0442 Template Test #1	Review Policy Change Reque
	Policy Change Process PX0444 PubSub #2	Submit Policy Change Reque
	Policy Change Process PX0437 PCM Test Mon Dec 28 #3	Review Policy Change Reque

My Tasks



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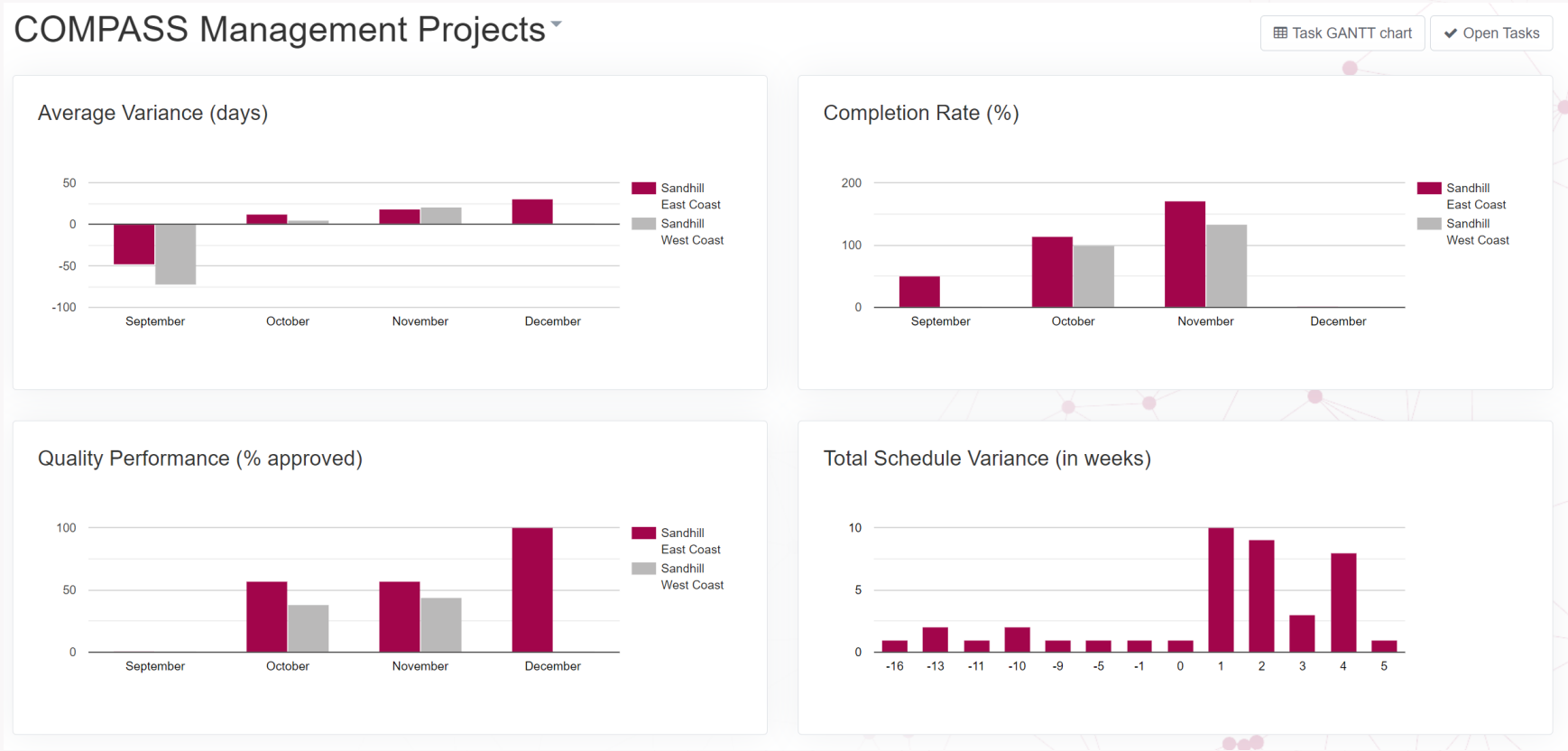
Dashboard – Metrics and Measurements



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Business Cases

Revenue

- Customer Satisfaction
- BI Decision Making
- Risk Analysis

Risk

- Regulatory Requirements Compliance
- Reputation Management
- Data Security
- Data Sharing

Cost

- Optimize Staff Effectiveness
- Improve Operational Performance
- Mergers & Acquisitions
- IT Modernization Initiatives

COMPASS (DGMS) provides for better Data Quality that delivers better Business Value

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The Value of COMPASS

Provides an integrated system for the rapid deployment, operation and analysis of strategic DG programs

4 Key Organizational benefits of COMPASS

- Provides an essential framework for rapid deployment operation and analytics of your strategic DG program
- Accelerates adoption of a DG program
- Maximises your investment in a DG solution
- Minimizes costs due to comprehensive pre-built COMPASS System, saving months of effort

COMPASS (DGMS) provides for better Data Quality that delivers better Business Value

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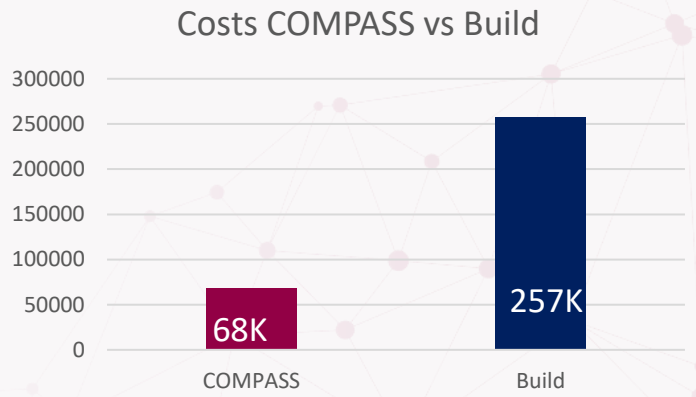
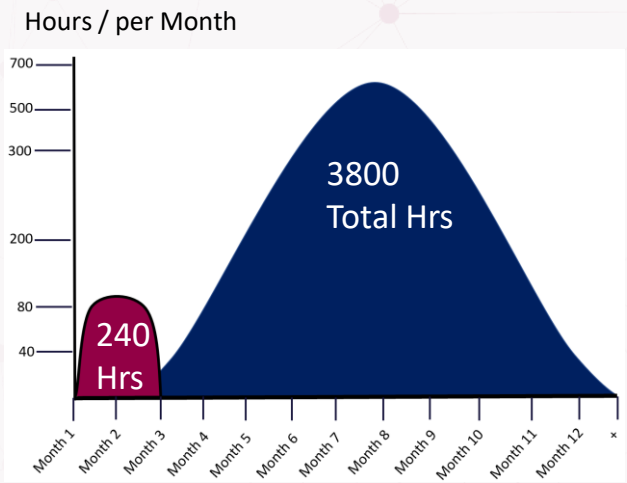
Time to Day 1 - COMPASS vs Build

COMPASS vs Build
Based on:
- **4 Team Members**
- **1 Year +**
- **Fully loaded costs**





Deployment:
- **COMPASS Available Day 1**
- **Build Available Day ???**

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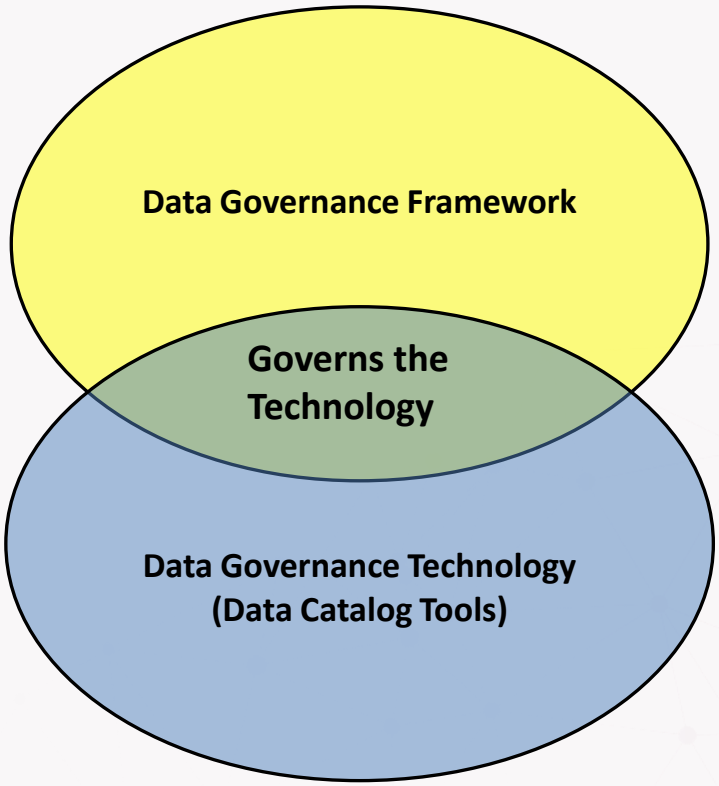
Cooperation between Governance and Technology



Data Governance Program provides the consistent processes, roles, policies, standards, and metrics that Data Governance technology needs in order to manage data

Quality control over the data being governed

Data Governance Technology manages the data with guidance from the data governance program

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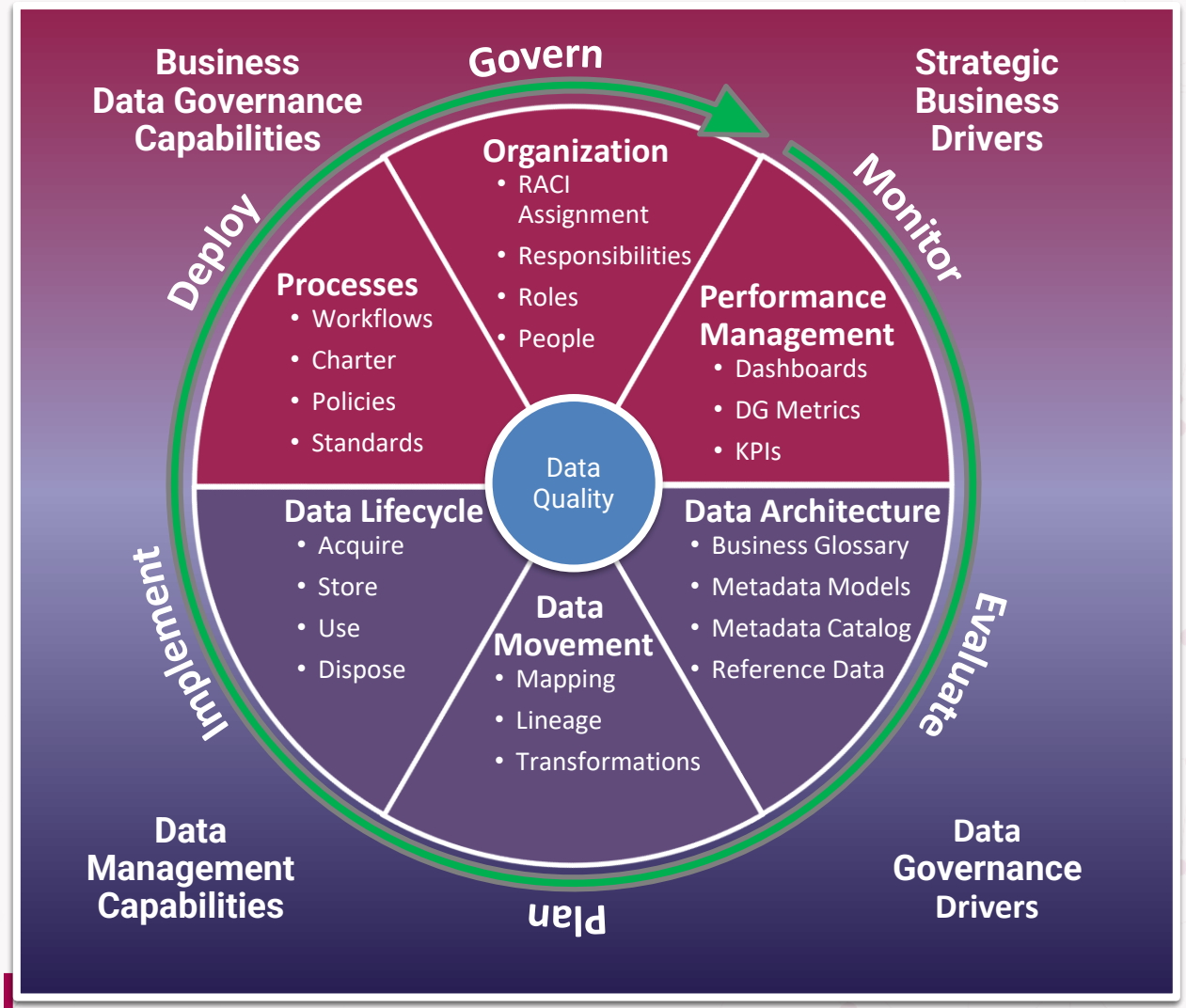
C O M P A S S

Compliance | Organization | Measurement | DG Policy | Data Architecture | DG Standards | DG Stewardship

Cloud based, Automated Data Governance Management System



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ERWIN DIS DEMO SCENARIO

Financial Institution Data Governance Scenario

Long Term Goal: Manage costs by making information readily available to all parts of the business.

Business Requirement: The bank is required by law to inform loan recipients by mail of privacy and security protocols regarding information managed by the bank

Current Issue: The Business Analyst is finding it difficult to integrate address information as none of the address fields conform to any standard naming conventions.

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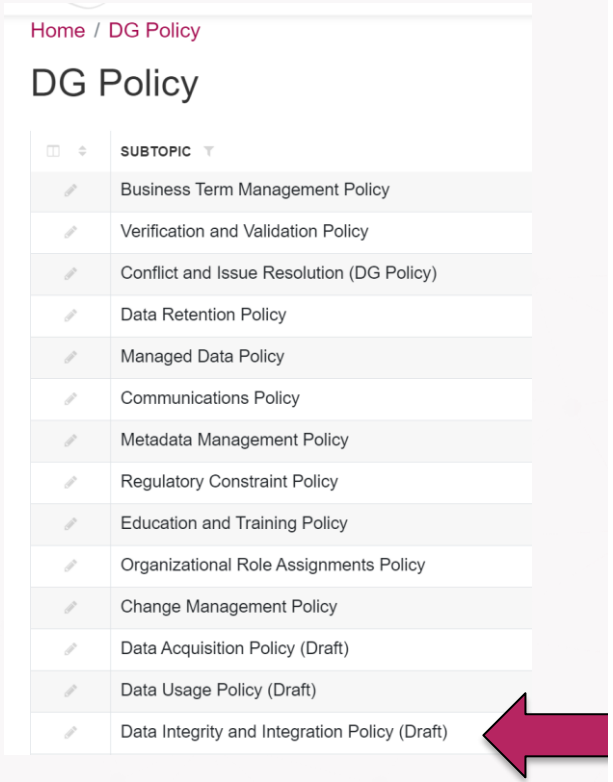
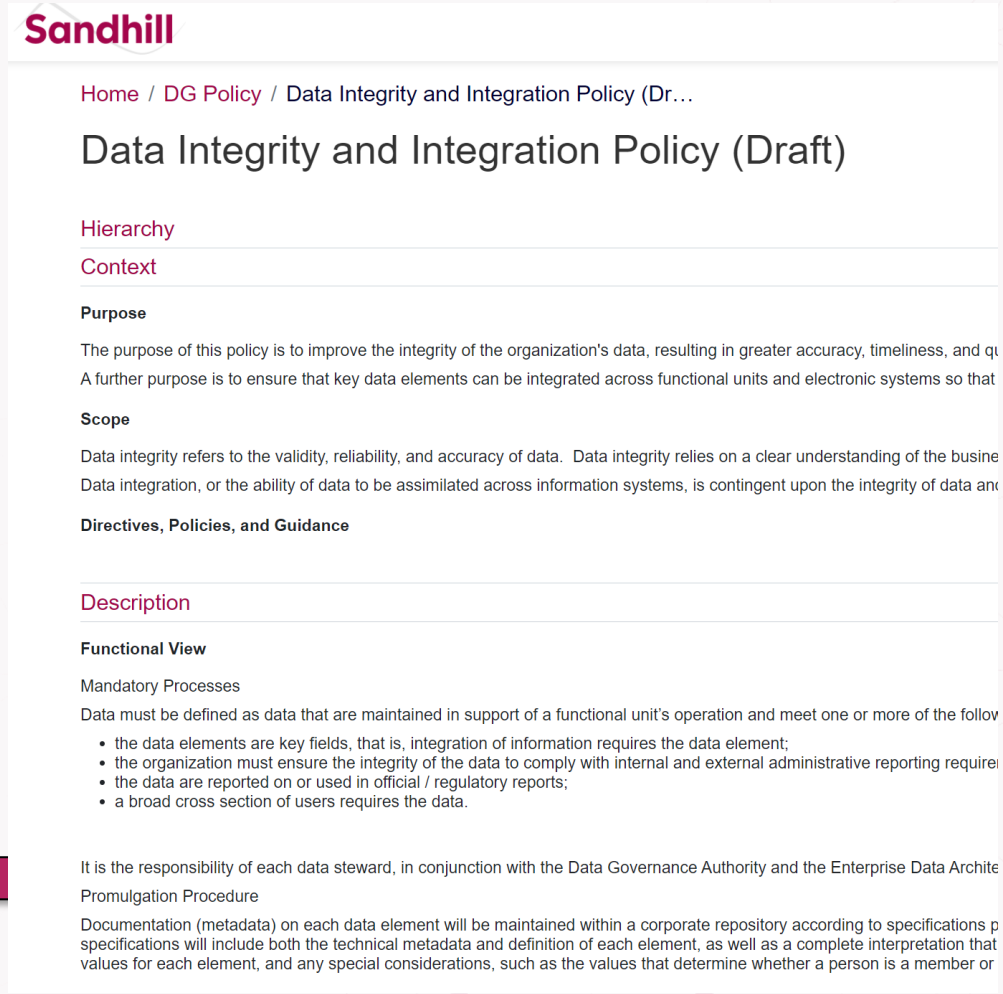
GOVERNING POLICY

What is the Data Governance Policy concerning data integration





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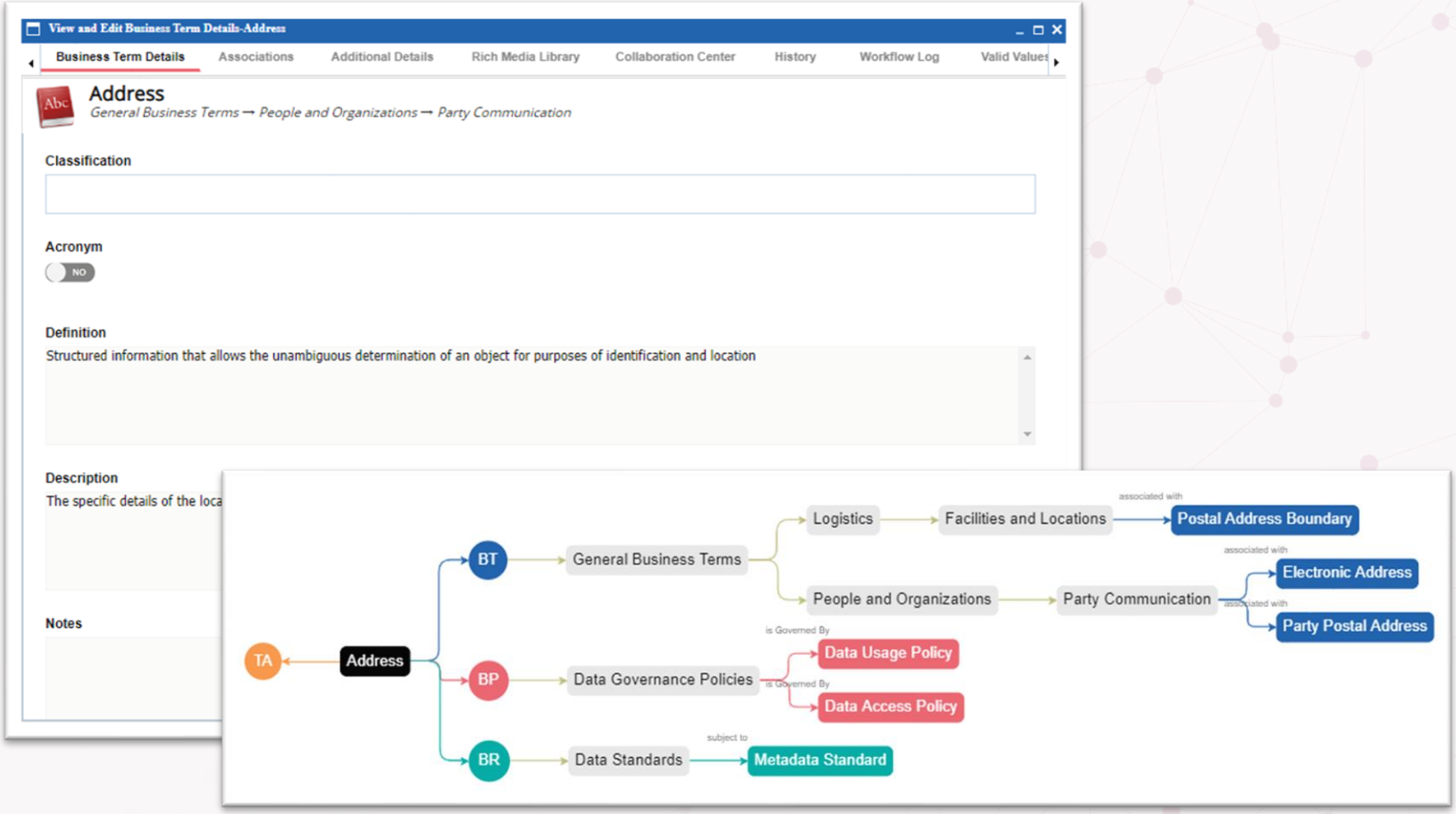
UNDERSTAND ADDRESS MEANING

Business Analyst needs to know what is the agreed upon meaning of Address



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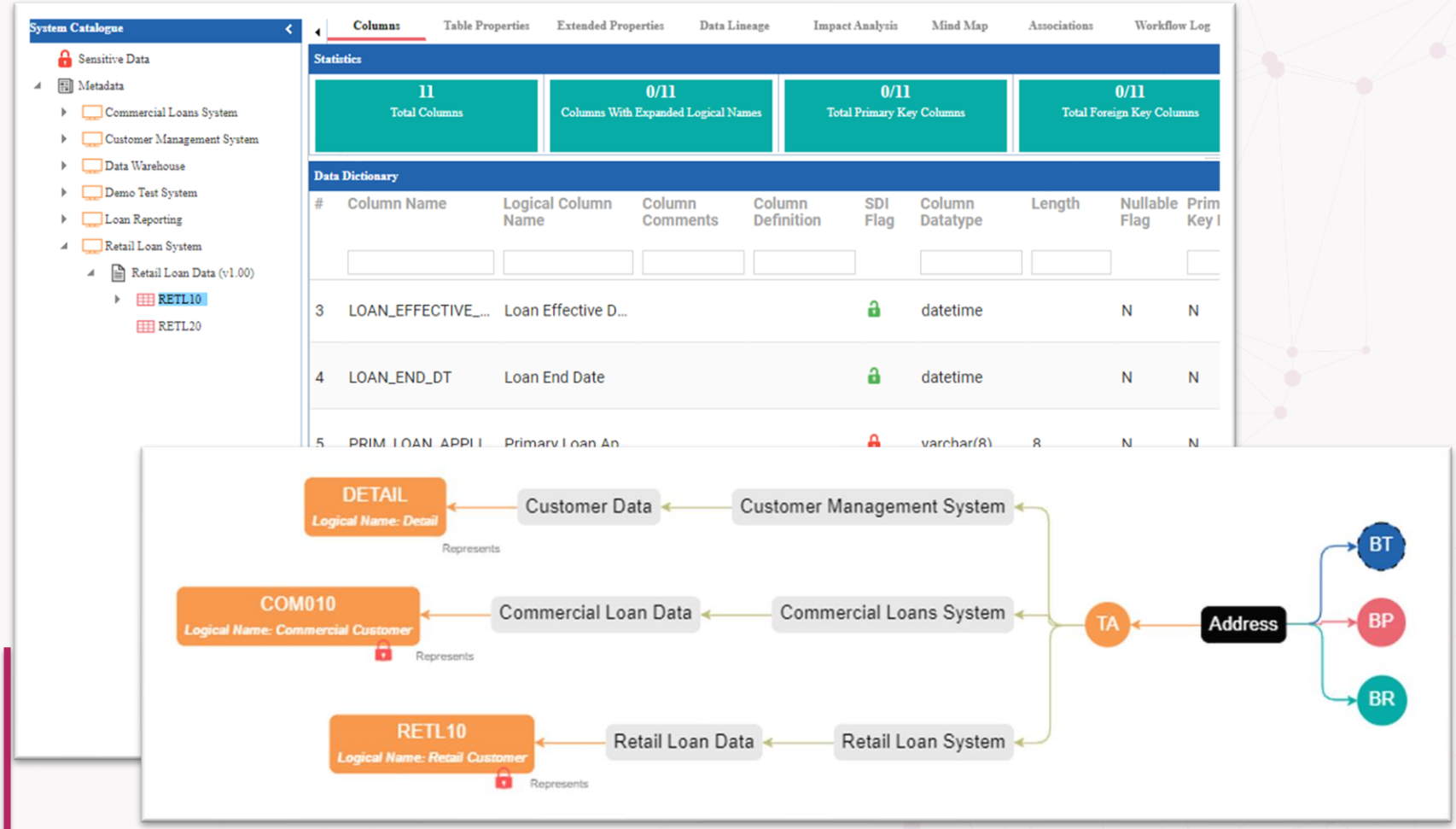
WHAT SYSTEMS

Business Analyst needs to know what systems contain Address information



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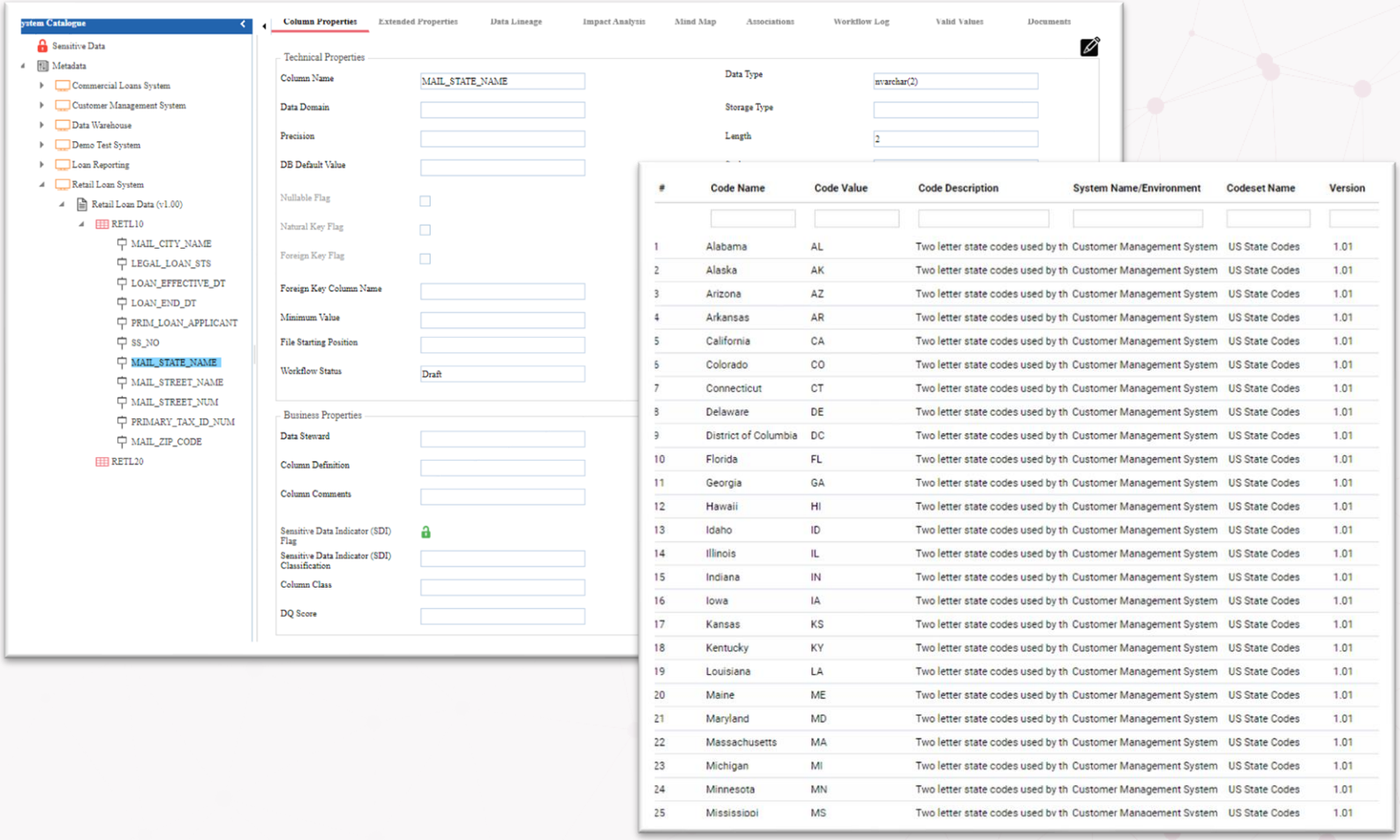
CHECK CONFORMANCE

Business Analyst needs to know what standards are applied



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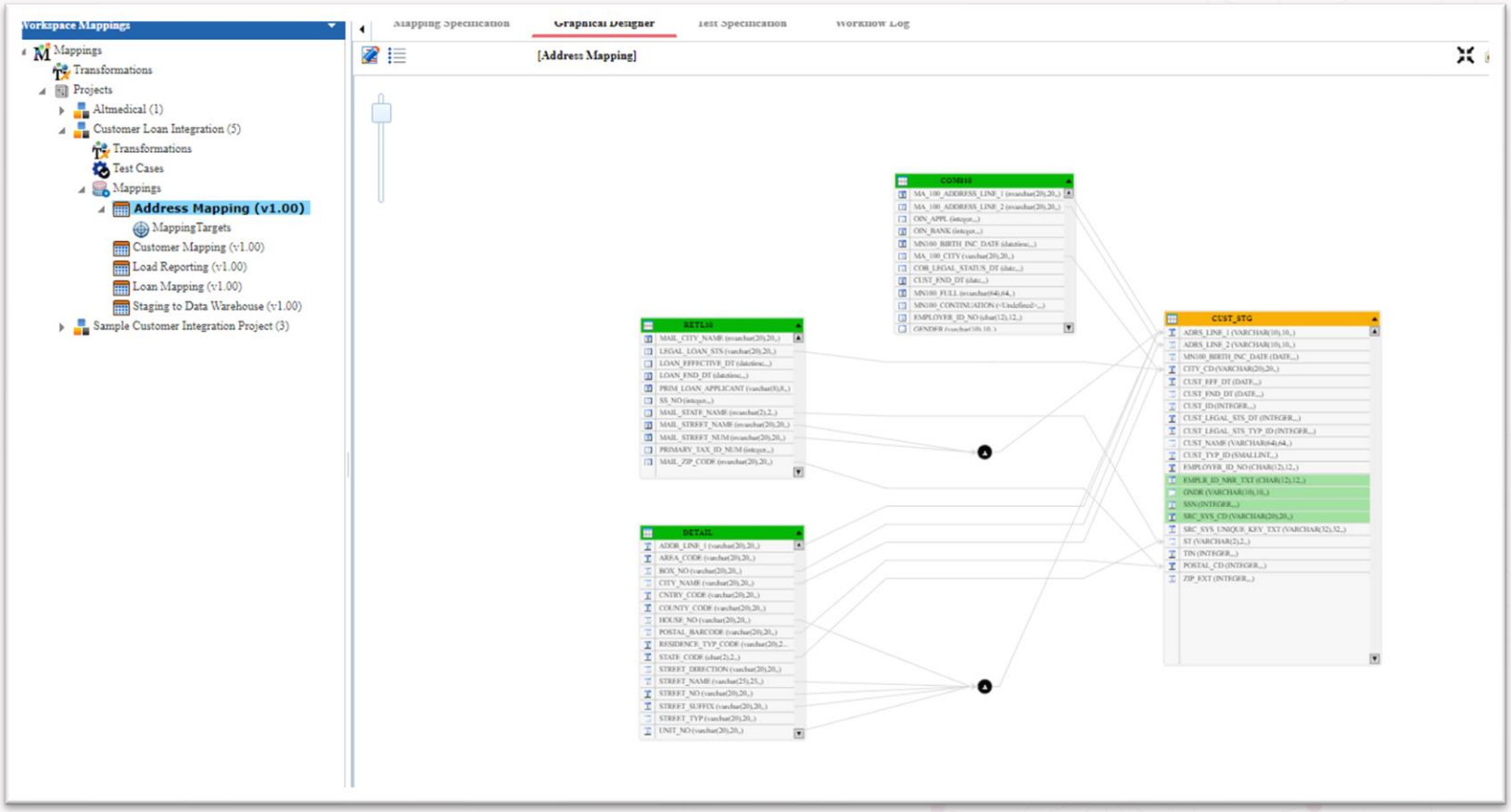
FIX NON-CONFORMANCE

Business Analyst initiates project to integrate Address



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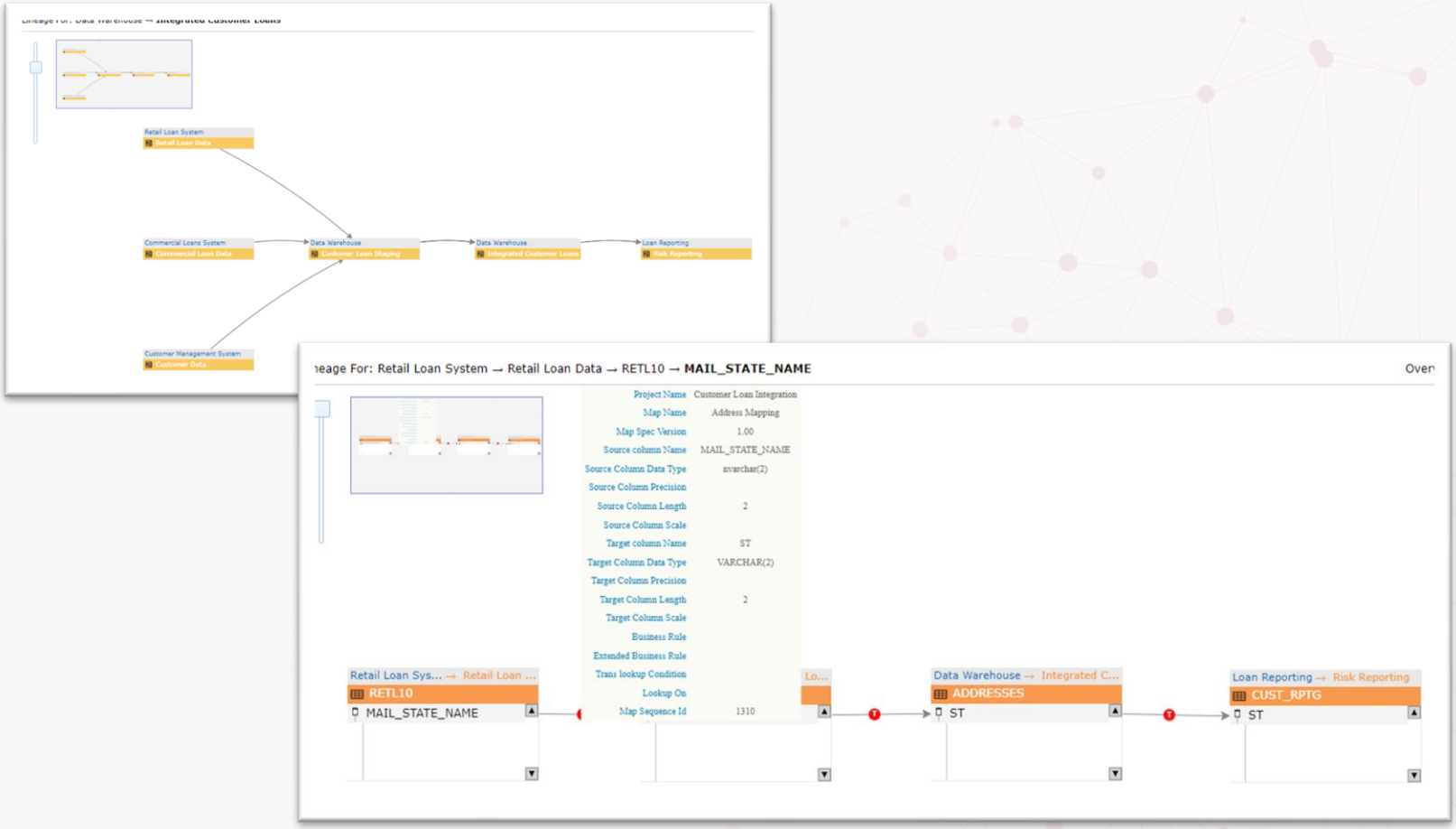
LINEAGE ANALYSIS

Business Analyst track Address lineage



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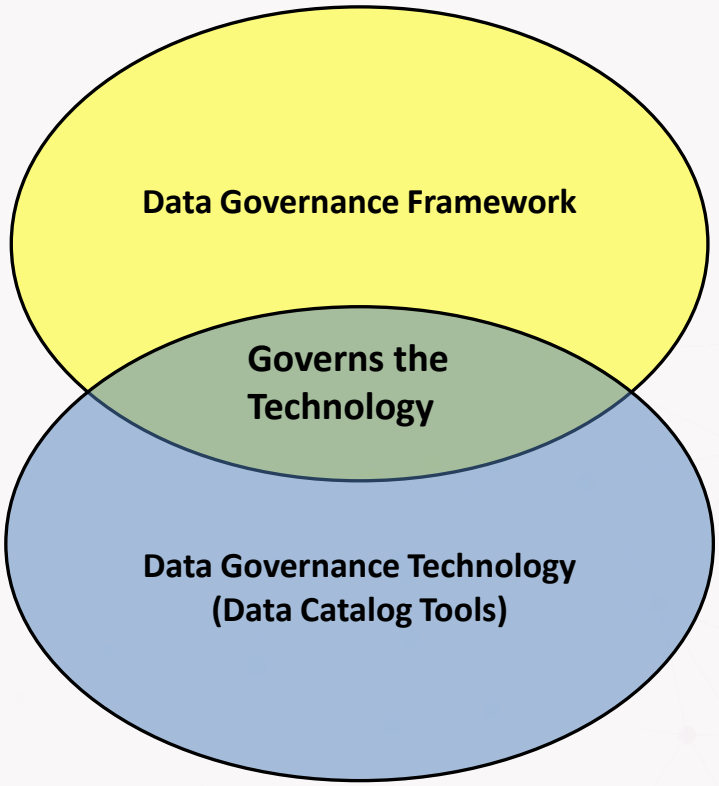
Summary & Conclusion/ Call to Action



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Contact Information

- For a more In-Depth Understanding of COMPASS or erwin DI
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    - +1 905 847 5882

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