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Advancing the craft of technology leadership



It's Your Data: Data Citizens and the Data Governance Journey

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How Data Gives You a Competitive Advantage

Here's a story that may be familiar to you: A group of professionals sits down in a meeting and an analyst presents numbers to the group. The questions begin. Where did you get those numbers? What datasets did you include? Why are my numbers different from yours?

Here's another story: You're creating a visualization of operating performance changes over the past year and are tasked with including information from another business unit. The problem is, you can't track down the data. IT can't help you; they point you in the direction of someone in that business unit, who points you to someone else, and so it goes.

Data and Analytics: The Core of Your Business

These challenges happen in many organizations every day. The emphasis on data-driven decision making not only expands the appetite for data but also intensifies the problems encountered in using it. The problem is far from new, but as data volume and variety increases, and as data and analytics become core to the business, the need to find data, understand its meaning, trust its source, and use it properly becomes even more urgent.

Businesses must solve these problems. Doing so is a requirement for digital transformation.

- **Digital businesses gather and use data effectively.** They analyze data to gain valuable insights about their customers, products, services, partners, operations, and supply chain. And they use this insight to drive decisions that improve efficiencies, reduce costs, increase revenue, and drive shareholder value.
- **Digital businesses are agile.** They go to market with new ideas quickly, adjusting strategy as the data shows them better ways to meet market demands.
- **Digital businesses are innovative.** They identify strategic opportunities and create and define new market niches for themselves.

In short, digital businesses understand the opportunities inherent in their data and use it to give their products and services a competitive advantage.

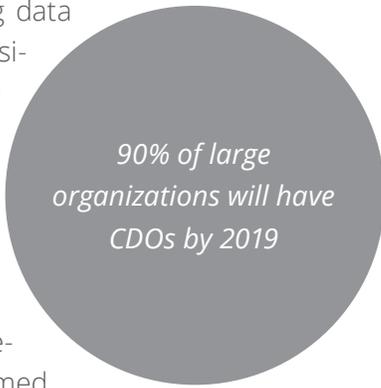


At CITO Research, we believe that none of this is possible unless a solid data foundation is in place. Data users need a roadmap that tells them how to find information as well as clear guidelines on how to use it. They need to understand whether they're using data correctly, without exposing the company to additional risk (as in the case of protected personally identifiable information). When such an organizational infrastructure is in place, data users become data citizens. They know and trust the data, actively participate in keeping it trustworthy, and can make data-driven decisions that drive business results.

What Enables Data to be Found, Understood, and Trusted?

At the core is strong data governance, a discipline that encompasses cataloging and defining important data, assigning responsibility for data to data stewards, and incorporating data governance into everyday processes seamlessly. Data governance ensures that data can be found, that its meaning is agreed on and clear—which facilitates a common understanding. It puts people in charge of managing data, so that questions can be answered and data can be trusted. Data governance is not “nice to have”; it's essential for doing business today.

Deftly handling data is critical for managing risk, uncovering opportunities, and moving fast to gain competitive advantage. So why isn't strong data governance the norm at most organizations? What's holding companies back from putting a strong data governance foundation in place? Why can't they transform their businesses and begin offering new data products and services? This CITO Research white paper posits that, as with many things, it's a combination of people, process, technology—and priorities.



90% of large organizations will have CDOs by 2019

Who's the Data Governance Boss?

In most organizations, data is still primarily the purview of the IT department. However, for the most advanced and digitally transformed companies, IT's role has changed: it is now partnering much more closely with business users. Under this construct, IT continues to provide its deep and essential expertise in managing the technical infrastructure for data, including storage, security, ETL, and more. But when it comes to data governance, wise IT departments now work hand in hand with the business users who are subject matter experts in the meaning and use of data. It makes good sense to do so: the business owns the business strategy, so it should also be in charge of governing the data that supports that strategy.

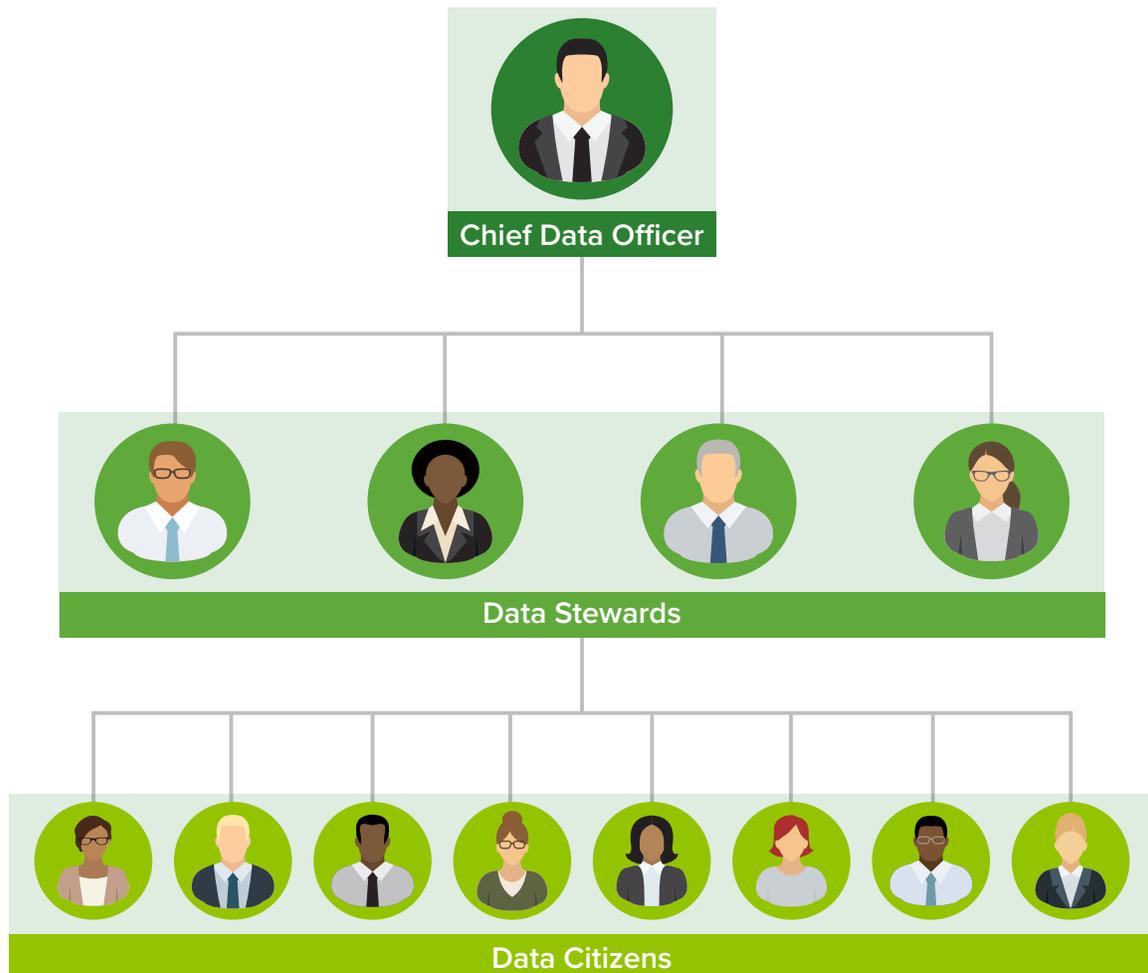
As the business side takes on more of these types of responsibilities, new structures and roles are emerging. The changes are often starting at the top. In many organizations, data is gaining C-suite stature with the hiring of a chief data officer (CDO). In fact, Gartner estimates that 90% of large organizations will have CDOs by 2019. These top-level hires underscore the criticality of strategic data management and strong governance.



CDOs cannot do it by themselves. They must develop and nurture a much larger initiative that governs and manages data on a day-to-day basis. This highlights another critical role: that of the data steward. Data stewards are key players throughout the organization who support the efforts of the CDO to provide clean, governed data that fuels new opportunities in their particular areas.

If you use data to do your job, then you are a data citizen

Effective data stewards need to be subject matter experts in how the data is used and in what it means in their areas, so their “day job” typically involves engaging with the information that they’re charged with governing. Data stewards, whether they have the formal title or not, are the front line in data governance, ensuring that an enterprise’s data can be easily found, trusted, and used by everyone who uses data to their jobs: the data citizens. The term data citizens underscores the democratization of data in the enterprise, allowing everyone to participate in the process of finding, understanding, and using data effectively.





Data Citizens Want Data Confidence

Data citizens need to be able to find, understand, and trust data. But addressing data governance is a challenge, thanks to pervasive and thorny issues such as the explosion in the number of sources of data, data privacy and data security issues, concerns about how data is being used, and a lack of alignment between groups within an organization about definitions for elements as deceptively simple as “customer.”

Businesses must have confidence that the right data of the right quality is used for the right purpose. Building that confidence requires embedding data governance and stewardship in the organization in such a way that it can easily adapt as the organization grows and changes. A flexible operating model must be in place to automate and integrate the day-to-day tasks of governance and stewardship, including measuring compliance, monitoring quality, achieving alignment around meaning, and resolving data issues.

How to Fix Duct-taped Data Governance

An enterprise approach to data governance cannot be achieved by cobbling together email, meetings, spreadsheets, and SharePoint documents. Data is foundational and pervasive and cannot be managed using “duct-tape data governance” any more than corporate finances can be managed in this way. Equally ineffective are approaches that attempt to “bolt” data governance features onto another tool such as data management or data quality. Such tools are narrowly focused, can't be used by the broad audience of data citizens, and do not deliver data governance at scale.

Data Citizens Need a Robust Data Governance Platform

- **Alignment and workflows.** A data governance and stewardship platform should manage alignment and agreement about what data means, how it is used, how it is shared and who can change it, with workflows that enable consistency and efficiency.
- **Flexibility and agility.** A data governance platform should support different types of organizational approaches out-of-the-box, including top-down, bottom-up, federated, centralized, global, and more. It should support an agile approach, with the ability to handle the most pressing business cases first. This helps the organization realize high-value quick wins and facilitates adoption.
- **Self-service and transparency.** The platform should enable data citizens themselves to readily find the data they need, understand its meaning and context, and determine its suitability for the task at hand. The platform should offer transparency so that everyone, from the CDO to data stewards to data citizens, can see how data governance efforts are moving forward.



- **Scalability and collaboration.** Jury-rigged attempts at data governance using spreadsheets or SharePoint do not scale. What's needed is a platform that incorporates people and processes, similar to those used for content management and IT service management. The platform must allow stakeholders to weigh in on critical decisions and facilitate clear, quick clear communication.
- **Enterprise-wide support.** A data governance platform must be able to support the entire organization, not just the portions of the organization that use a particular tool. It should be purpose-built to serve as the system of record for data.
- **Integration.** A data governance platform must be easily integrated with other systems, enabling flows to and from the data governance platform. It should be available on multiple platforms, and offer a modern enterprise service bus (ESB) architecture that provides connectors and integration patterns specifically designed to incorporate key metadata.

Collibra Gives a Voice to Data Citizens

Collibra takes a platform and configuration approach to data governance and stewardship, which is comprised of a portfolio of key capabilities. Collibra provides purpose-built components that perform specific functions out of the box. This gives organizations value from the start and the flexibility to configure the platform for their needs. Organizations can use the best practice configurations immediately as-is or adjust them to fulfill their specific requirements. Templates for specific industries and business challenges are available, with Collibra and its partners developing more all the time.

Core Applications of the Collibra Platform

Business Glossary: The Business Glossary helps organizations reach an agreement on the definition of business terms. Organizations can drive ownership through the business by capturing business and data definitions, critical attributes, KPIs, and processes; involving business stewards in the review or approval of workflows; and easily finding the data they're seeking, even within both their desktop apps and mobile devices.

Reference Data: Reference data categorizes other data. From country abbreviations to medical billing codes, to crosswalks and mappings, reference data plays a key role in both data quality and data governance. Collibra enables organizations to manage all their reference data as well as metadata such as definitions and proper use. Reference data can be collaboratively approved and published so that the latest classifications and codes can be used organization-wide.



About Collibra

As the leader in data governance, Collibra helps global organizations gain competitive advantage by maximizing the value of their data across the enterprise. Collibra is the only solution purpose-built to address the gamut of data stewardship, governance, and management needs of the most complex, data-intensive industries. Our flexible and configurable cloud-based or on-premises solution puts people and processes first — automating data governance and management to quickly and securely deliver trusted data to the business users who need it.

The Collibra data governance platform also embraces the new requirements of big data solutions, with automation, machine learning, and the flexibility to govern data assets from source to visualization. The mission of Collibra is to provide the technological foundation that allows organizations to define and automate data governance to satisfy their regulatory, operational, and strategic demands. The end result is seamless stewardship and continuously improving governance, which in turn improves the quality, visibility, and value of organizations' data.

The Collibra customer base includes leading organizations in industries such as Financial Services, Healthcare, and Technology.

Stewardship: The Collibra platform's data stewardship capabilities enable a process-oriented data management strategy. Out-of-the-box processes for semantic definition approval, report certification, and data attribute modification are configurable to match users' requirements.

Data Sharing Agreements: Collibra lets organizations build and manage flexible processes that enable them to share data internally and externally while minimizing risks. For example, the platform allows users to submit a data request, sign a usage agreement, and obtain the data they require.

Policy Management: The Collibra platform enables organizations to define and manage business policies for data security, privacy, and data sharing and ensure that those policies are reviewed, approved, adopted, and enforced by all the necessary stakeholders.

Data Help Desk: Issue management is critical to users' trust in data. If data citizens do not have a place where they can get questions answered and problems addressed, they will not have the confidence to rely on data for major decisions. Through the data help desk capability in the Collibra platform, data citizens can get the answers they need to effectively use data to do their jobs.

Integration: Through active integration, Collibra Connect enables organizations to connect data, metadata, reference data, policies, and definitions with information in other systems. An industry standard integration platform with pre-built templates gets organizations up and running quickly, while a large and growing library of connectors provides integration with many types of systems. This library is constantly expanding through the efforts of an active ecosystem of partners and users.



Traveling the Road to Data Governance

Every organization is at a different point in its data governance journey. Each organization must start with areas where the need for data governance and stewardship is most critical. Collibra provides the flexibility to tackle what is most urgent to drive value and opportunities.



Popular Starting Points

Report certification and watermarking. Report certification is the process of validating that a given report is correct, accesses the right data sources, calculates derived values like KPIs consistently, and follows internal rules for averaging, periods, and the like. Once certified, reports may be watermarked to show that they are authoritative.

Analytics certification. Analytics certification is similar to report certification but with a focus on the accuracy, repeatability, and verification of analytic models. Analytics certification provides assurance to the user that the logic of the model itself, as well as the data it analyzes, have been verified and are trustworthy.

Data-sharing agreements. Data sharing agreements are the tool for managing the dissemination of data and its use by others. These can be used for external agents, or for internal groups that need access to data that could create risk for the organization. Collibra has a set of configurable workflows that ensure that the proper agreements are formulated, signed, approved, and recorded. These agreements govern what data is shared and make explicit any compliance issues associated with data sharing.



Big data ingestion. Big data stores are often populated with data that hasn't been integrated into the organization in a formal way. While this practice is cost-effective from a storage perspective, it makes it difficult for others to use the data later on. Collibra can capture the information needed when data is ingested so that users have visibility into big data that's available, as well as its ownership and lineage.

Shared understanding. Too often, meetings devolve into questions about data. With Collibra, data owners and other stakeholders collaborate to create a common understanding of data elements. Collibra enables definitions to be documented, shared, and easily accessed by data citizens so that they can find the data they need and understand its precise meaning.

Data quality. Data quality is the process of improving the accuracy of the information that's collected. While most organizations have a set of data quality rules and a means of enforcing them, they often lack a means of communicating information about quality to data citizens. Collibra provides at-a-glance indicators that inform data citizens about the quality of the data they are using and can automatically raise issues when data quality measures are outside of defined tolerance levels.

Issue management. Data-related issues will inevitably arise, and users seldom know where to go with problems and questions about data. It is critical that users know there is a mechanism for fixing problems, and that they are empowered to use that mechanism. Collibra enables you to create a centralized data help desk to address data issues, improving self-service capabilities.

Audit and regulatory support. Ensuring that you have the right information to properly manage risk can be a significant challenge. Collibra can substantiate the information the business uses to build risk models. The visibility and transparency offered by Collibra make it easy to support audit or compliance requests by providing information consumable by third parties as needed.



Rule Your World with Well-governed Data

Data governance should serve as an enabler for digital transformation, accelerating analytics and empowering organizations to compete more effectively. A comprehensive, purpose-built data governance platform like Collibra helps facilitate the necessary cultural shift as well as the technical handling and definition of the organization's most important asset: its data. The platform scales from a single business case to a large, multi-national organization-wide implementation.



Data Trust is Key

A Washington D.C.-based university experienced this phenomena first-hand. Its data governance program was three years old when it surveyed its data citizens to identify top pain points. Despite investments in people and process, the university found that data citizens didn't trust data and they weren't sharing it.

To address these issues, the university adopted Collibra and rapidly implemented the platform's data sharing agreements and report certification capabilities. Almost immediately, data citizens recognized the value. These two quick wins helped instill a culture that supports data governance and stewardship. "I call technology the game changer," said the university's manager of data governance and quality. "That's what took us to the next level in data governance. Adoption exceeded my expectations." Today, the university uses Collibra to track hundreds of data integrations, providing visibility into data lineage as well as insight into how any changes might impact those integrations. Collibra enables the university to support the needs of many diverse stakeholders, bringing trust and transparency to the use of data.



Collaboration Breeds Confidence

A large publicly traded savings bank headquartered in the Midwest recognized the need to get business users involved and on board early in the process. The bank's vice president of data governance made a radical move: she gathered about 80 data citizens and data stewards from across the company for a nine-day offsite meeting.

Using Collibra to capture and document their work, the group built a business glossary of 1,200 data elements. Collibra allowed them to easily add contextual information such as system descriptions and definitions of acronyms to ensure that the project delivered value to users. "That approach gave us a propelling launch. I had over 80 ambassadors spread throughout the company who were familiar with the tool and used it as a resource," said the VP of data governance. A strong platform for data governance positions the bank to make confident decisions in a fast-changing business environment.



Pockets of Data Governance Drive Change

A Michigan-based health insurance company has propelled its data governance efforts across the entire organization with the help of Collibra. Prior to implementing the platform, the company had "pockets of data governance," said the project portfolio manager and data governance coordinator.

But as the organization realized successes in small areas, momentum grew and data governance is now a bottom-up rather than a top-down effort. Engaging the business is a key driver of success because well-governed data supports critical business decisions with shared context and understanding. Today, issues with data are easily surfaced and resolved, increasing transparency and trust across stakeholders. The company is using Collibra to proactively manage data quality, addressing problems before they impact customers.

By kick starting data governance among data citizens, Collibra helps organizations realize the vision of those responsible for data governance, right up to the CDO. The mission is to empower data citizens: everyone who needs to use data. Collibra supports CDOs and enables them to succeed.



Are You Ready for Data Governance?

The best approach to data governance is to simply get started. Here are some questions to ask yourself:

- Do you know where your data is?
- Do you know where your data comes from?
- Do you know whether your data is accurate?
- Do you know what your data means?

If you answered “no” to any of these questions—and the vast majority of businesses do answer no to one or more of them—then implementing a purpose-built data governance platform could be the right next step toward digital transformation.

At the outset of this paper, we asked why strong data governance isn't the norm at most organizations today. CITO Research believes that Collibra fills a critical technology gap. Data governance can't be supported effectively by duct-tape approaches using ad-hoc tools like spreadsheets, nor by point solutions with a governance add-on. It requires a platform with active integrations with other systems. CITO Research recommends Collibra because it supports all roles, from data citizens to data stewards to the CDO, and offers technology that provides a strong, agile foundation for data governance, enabling companies to move fast and turn their data from a problem into what it truly is: the source of all differentiating opportunities.

This paper was created by CITO Research and sponsored by Collibra

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