Ken Lownie

everteam

Morgan Templar

Three Quick Wins

To Kickstart

Information Governance

Welcome

- Slides will be provided
- Submit Questions throughout; Questions will be reviewed at the end of each section
- Follow the conversation on Twitter @everteamtech

Speaker Bios

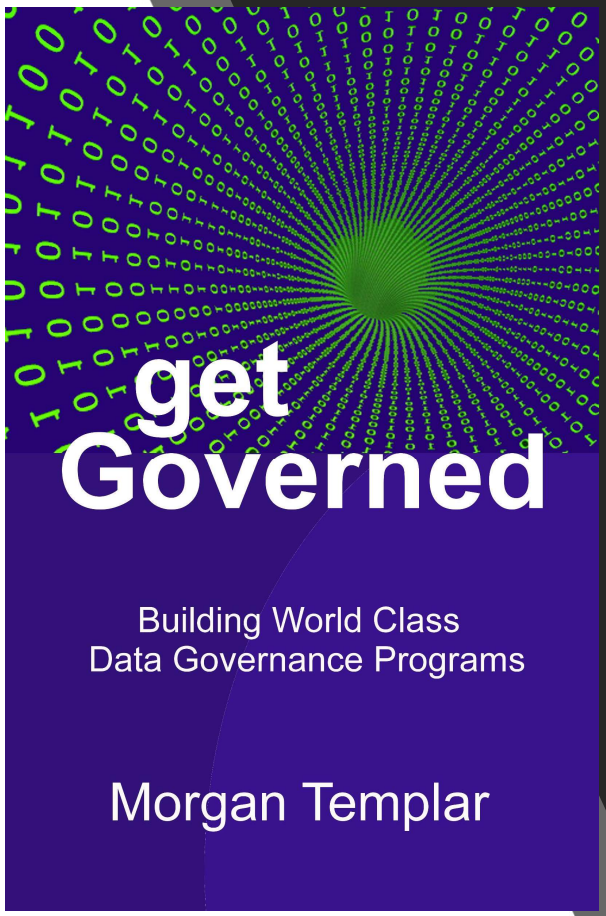
Morgan Templar is the author of the best-selling book, "Get Governed: Building World Class Data Governance Programs." She is the CEO of Get Governed LLC.

She has over twenty years experience in managing information assets and analytic programs with a strong focus on healthcare data. She is an expert in regulatory and accreditation compliance.

As a data governance teacher and coach, she brings a common-sense point of view to develop realistic and achievable strategies and roadmaps with a focus on people rather than systems.

Ken Lownie is the head of Everteam's business in North America. In that role, he is responsible for ensuring the success of every US customer.

Ken has been implementing enterprise software solutions at large organizations for more than twenty years. Much of his experience is in implementing systems that address compliance requirements in highly-regulated organizations.



Bonus:

The first 20 registrants* will receive a complimentary copy of Morgan's book:

> "Get Governed: Building World Class Data Governance Programs"

We will contact you by email to confirm your shipping address

The New Information Governance Imperative

Building the Strategic IG Initiative

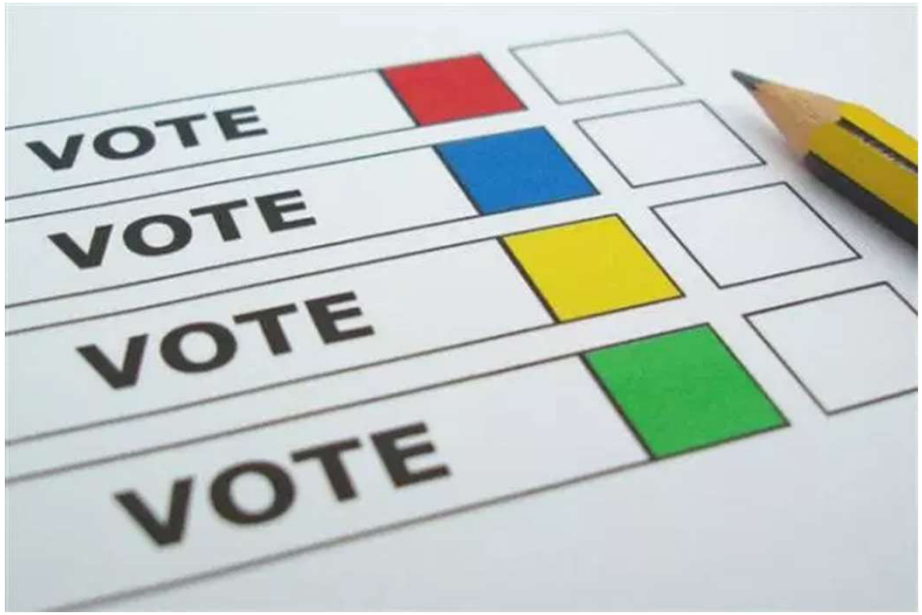
Identifying Quick Wins

Three Examples of Quick Wins

Selecting Governance Software

The New Information Governance Imperative

- Regulatory compliance *pressures are growing*.
  - A new focus on Privacy
- Risk and cost of storing unneeded and *obsolete information in unmonitored "Shared Drive"* environments and obsolete applications
- In spite of this new Information Governance Imperative, it can still be challenging to get these projects *above the funding line.*
- Combine the strategy and framework of IG with short-term, quick-win tactical projects and *demonstrate results*



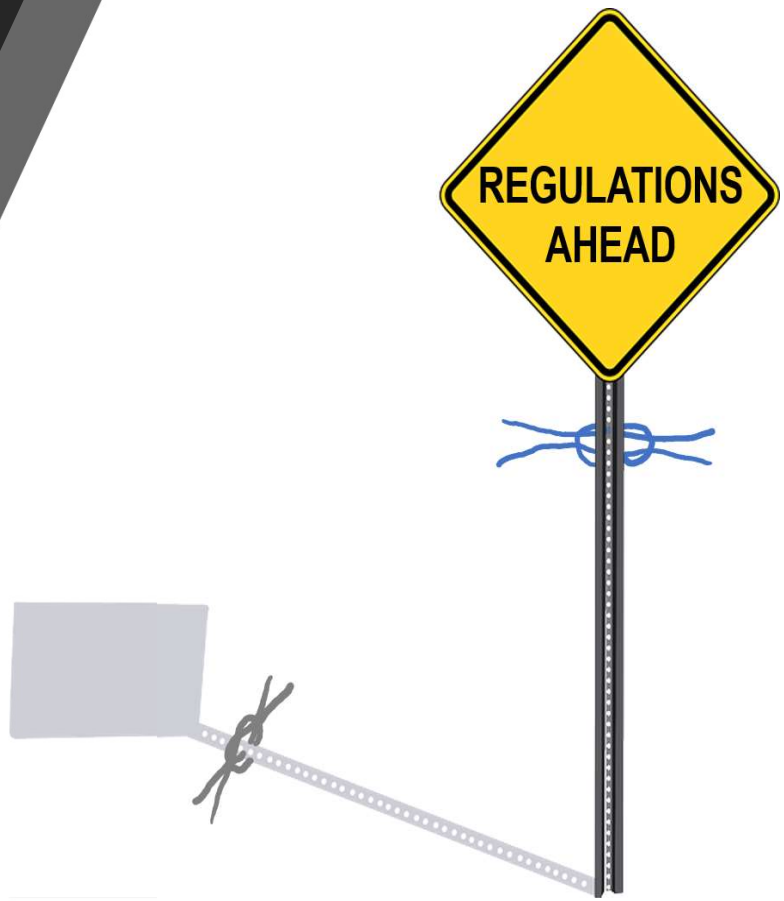
Poll 1

Three Main Impacts of Governance

- Regulatory or Accreditation requirements
- Data Quality Impacts
- Customer Experience

Regulatory or Accreditation Requirement Impacts

- Remediation of Negative Findings of a recent audit is paramount
- Projects tied to meeting Regulations or Accreditation requirements are more likely to be funded
- Future regulations that must be complied with



Data Quality Impacts

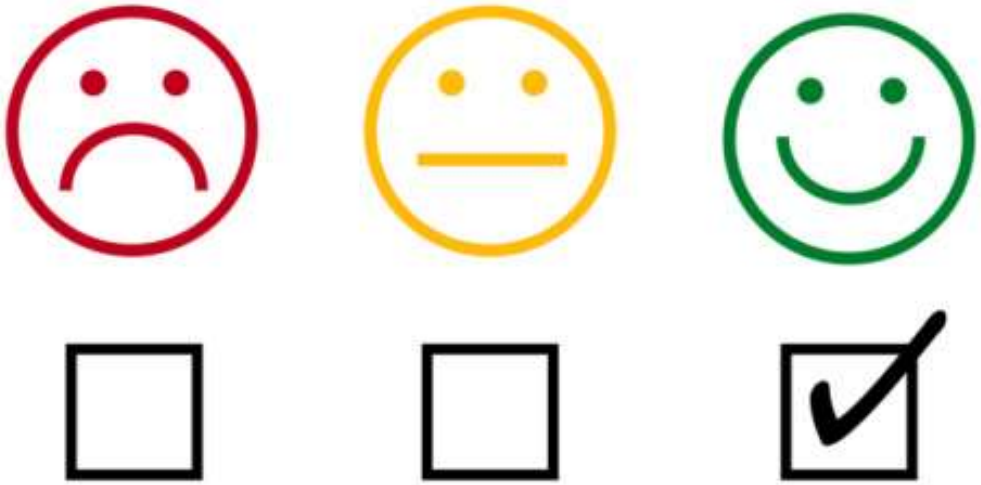
Customer or Stakeholder complaints

Known or perceived inconsistencies in data

Audit findings within operations

Customer Experience Impacts

- Data that is fed to customers
- Customer Complaints
- Ensure a consistent experience across all platforms – web, app, telephone



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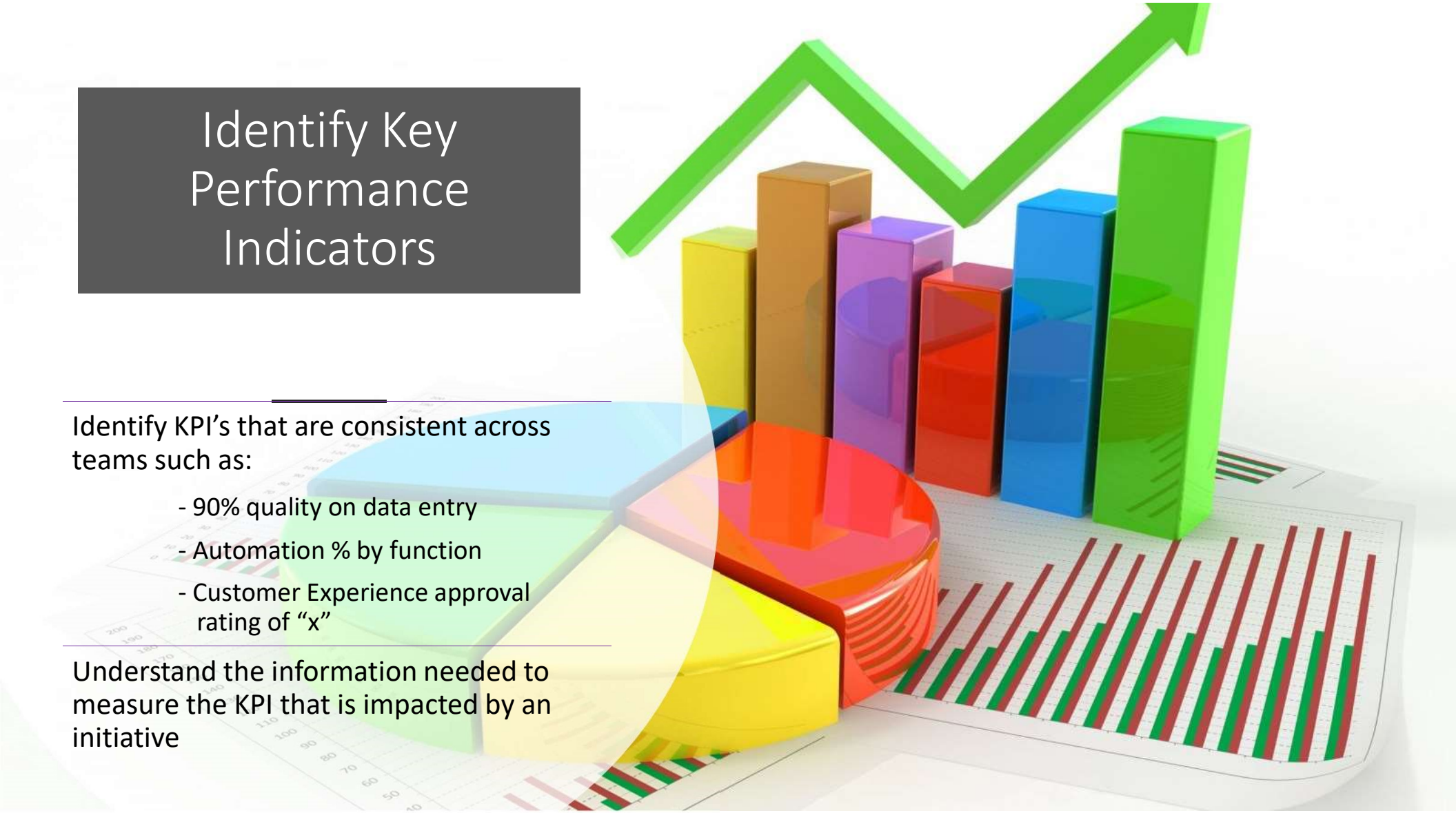
Establish a consistent strategic framework

"It all starts by knowing what information is important to measure"

- Morgan Templar

Identify Key Performance Indicators



Identify KPI's that are consistent across teams such as:

- 90% quality on data entry
- Automation % by function
- Customer Experience approval rating of "x"

Understand the information needed to measure the KPI that is impacted by an initiative

Think beyond your team or department in an end-to-end manner

- “How is this information used downstream?”
- “Who created and/or contributed to the information upstream?”
- “Initiatives should include the stakeholders of the entire life-cycle of information”

"Get in the habit of being inclusive of all Stakeholders creating a
CULTURE OF COLLABORATION
This is critical for successful governance."
-Morgan Templar

Socialize the Vocabulary and Outcomes of Governance as you work on Initiatives

- Call people by their titles: Are you working with a 'Stakeholder' or a 'Data Steward'?
- When framing messages include references to the 'data dictionary,' 'data glossary,' 'data lineage,' and/or 'data model'
- Include a "Governance Impacts" section in weekly status reports
- Ensure that outcome reporting rolls up to the highest levels

Techniques to secure the support of Stakeholders

"Long-term Stakeholder buy-in is a matter of building and maintaining trust"

-Morgan Templar

Stakeholder Trust is Built with Communication

- Involve them in planning from early stages
- Ensure that their inputs are clearly articulated and reported on
- Be clear when something is beyond the scope of the project and help them find the right mechanism to get their ideas approved
- Have a clear communication plan and RASCI* for the project that includes governance roles
- Demonstrate the value of the Governance Framework to the stakeholders for continued support

*RASCI: Responsible; Accountable; Supporting; Consulted; Informed

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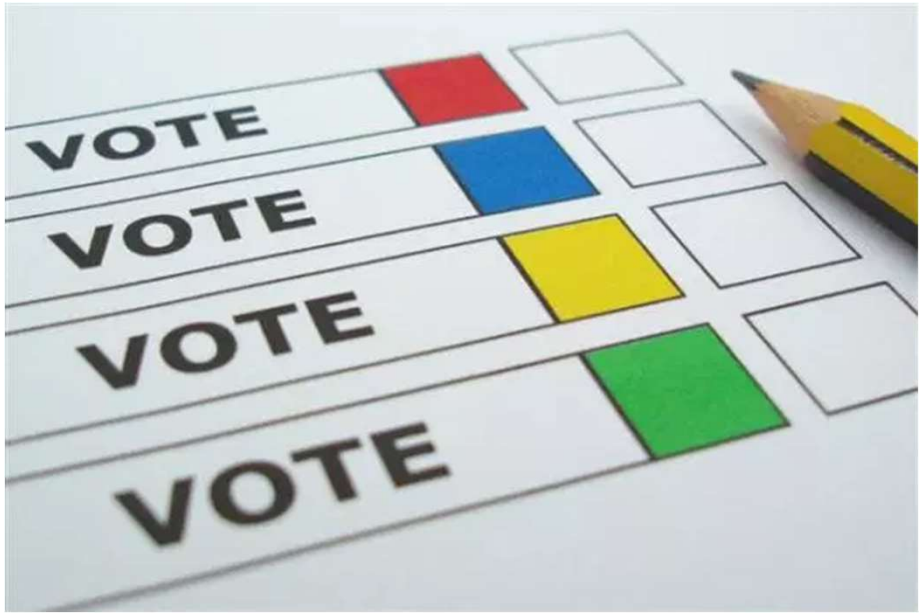


Poll 2

Identifying Quick Wins

Scoring on Two Dimensions

Business *Impact*

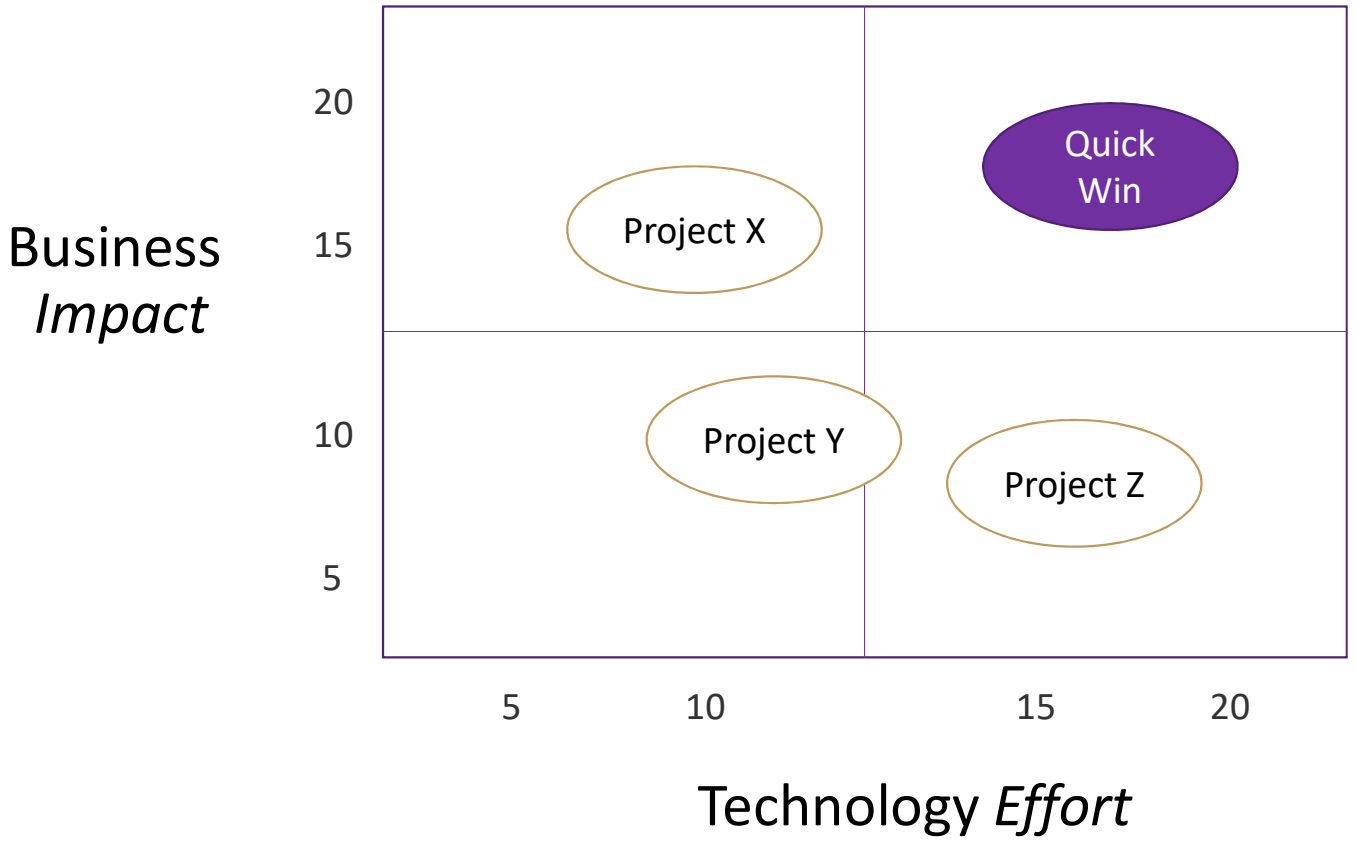
	No	Possibly	Yes	Absolutely
Demonstrable ROI	1	2	3	4
Strong Sponsorship from a Perceived Leader	1	2	3	4
Clear Association with a Corporate Goal	1	2	3	4
Complete within 3 to 4 months	1	2	3	4
Clearly Addresses Risk or Compliance Requirement	1	2	3	4

Scoring on Two Dimensions

Technology *Fit*

	No	Possibly	Yes	Absolutely
Simple Solution Focused on Specific Use Case	1	2	3	4
Available Funding	1	2	3	4
Fit with Supported IT Technology Platforms	1	2	3	4
Easy to Procure	1	2	3	4
Able to Repeat Execution	1	2	3	4

Scoring on Two Dimensions



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Three Examples of Quick Wins

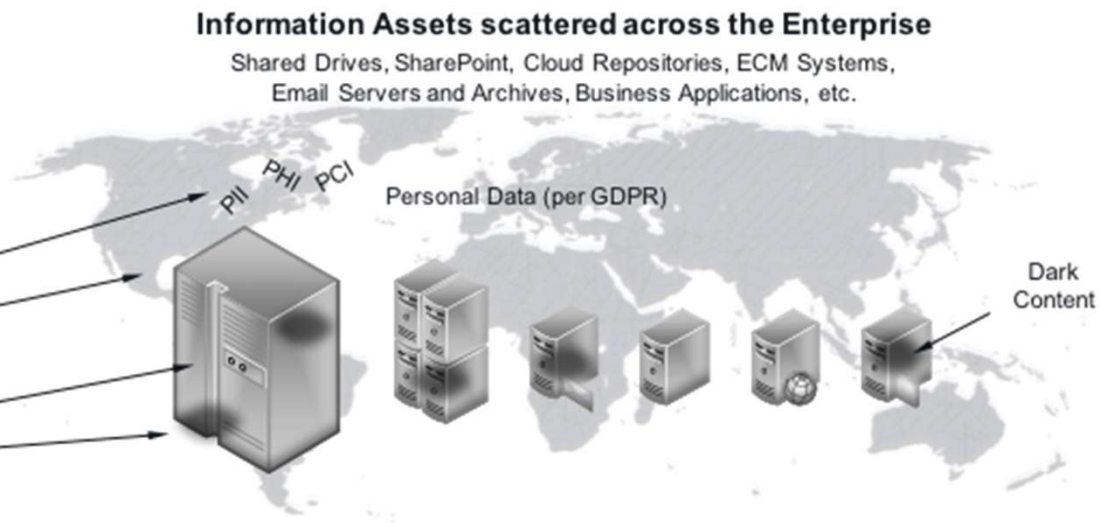
Dark Content

1

The Dark Side

Challenges with Information Assets

- Exploding volume of corporate information created, stored and consumed
- Data Privacy issues: Personal Data (GDPR definition) PII, PHI, PCI, etc.
- Data Residency issues
- Information scattered across many systems
- Dark Content
- Information Assets not created equal (different Categories such as Business Records, ROT, ESI, etc.) and thus may require different rules to handle them.



Costs of Dark Content

Corporate Knowledge

- Loss of value & insight about Information Assets

Growing IT Costs

- Storage of content
- Barriers for legacy application decommissioning
- Barriers to cloud adoption, especially EFS

Increased Legal Risks and Costs

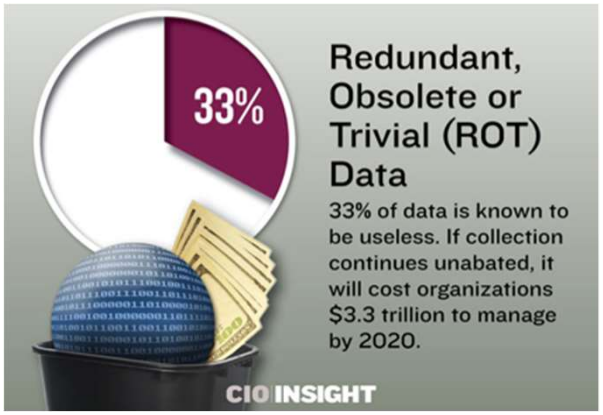
- Increased legal & non-compliance risks and costs
- More barriers & increased risks for GDPR compliance
- More barriers & increased risks for M&As

Illuminating Dark Content with AI Tools

File and Content Analytics

Use of faceted search and text analytics techniques to find…

- Duplicate files
- Obsolete items
- Sensitive and Private Information



Three Examples of Quick Wins

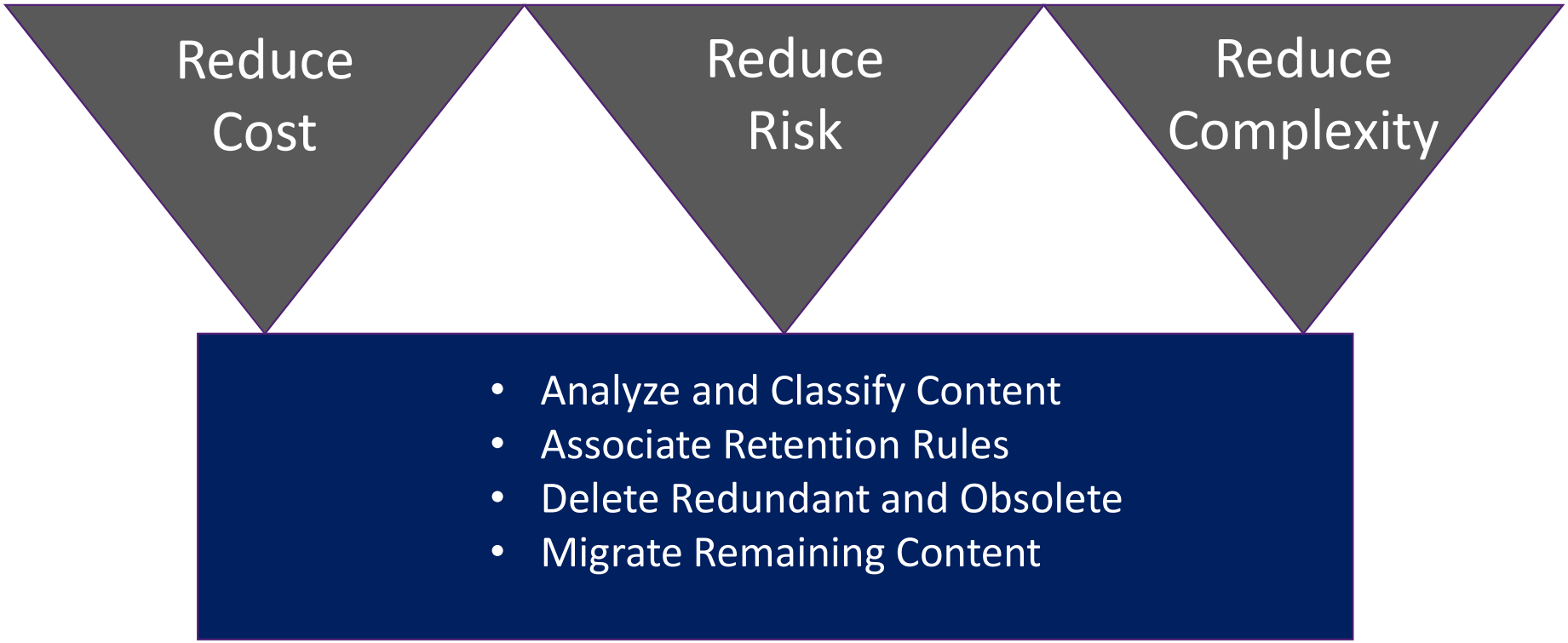
Dark Content

1

Decommission

2

The Decommissioning Use Case



Three Examples of Quick Wins

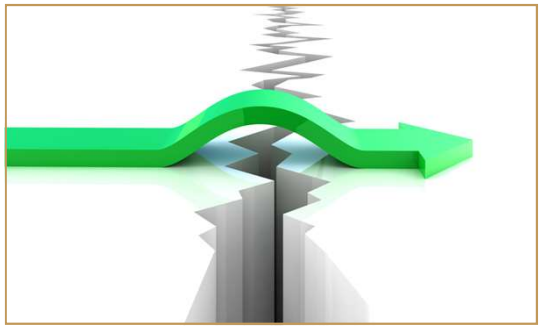
Dark Content

1

Decommission

2

Compliance Gap



3

compliant
company
compliance
supervisory authority
third party
act
prepare
breach
safety
consent
processor
confidential
security
DPO
officer
general
protect
law
GDPR
data
regulation
transfer
fine
access
technology
privacy
EU
safeguard
protection
rules
legislation
password
european union
personal
information
business
secure
controller
filing system

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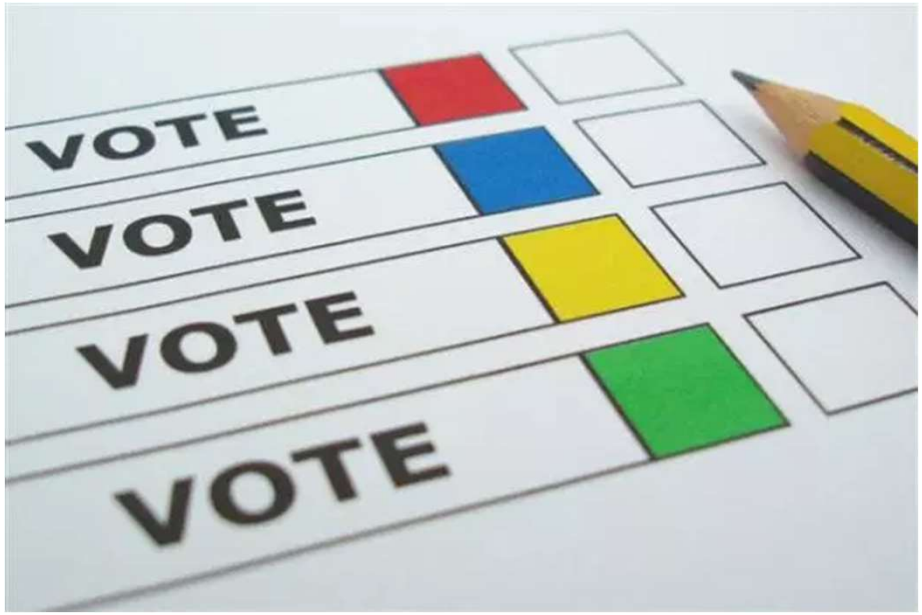

Poll 3

Buyer Beware: Choosing Governance Software

- Beware of “Platforms”
  - Information has to be managed ACROSS systems, not just WITHIN one system
  - Flexible Toolsets will deliver More Value
  - Focus on the use cases
- Look for Embedded “AI”
  - Machine learning and Natural Language Processing Capabilities are Critical
- Get Comfortable with a New Class of Vendors

Questions?

Thank you for your time!

Contact us for more information:

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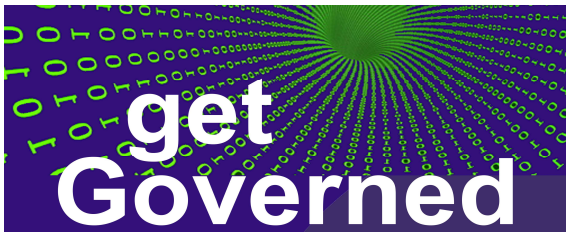

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