Darren Cooper – Information Management Consolutant, IBM Software Group

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Le "plan de formation" de l'information

Guide du Manager

Forum Intégration et Gouvernance de l'Information :
Vers un business plus intelligent

5 Mai - IBM Forum, Bois-Colombes

Synopsis

- Allez vers une organisation plus agile pour mieux répondre aux attentes du métier, tout en maitrisant les couts d'exploitation, nécessite la réflexion sur des démarches de transformation informatique.

- La gouvernance des données d'entreprise est de plus en plus au cœur de cette réflexion

- Tout comme des formations ou plans de carrière proposés aux employées contribue à l'amélioration de la performance d'entreprise, une démarche de gouvernance des données est devenu aussi un contributeur clef.

- Le manager informatique à néanmoins des challenges:
  – Comment sensibiliser le métier sur ces enjeux?
  – Comment envisager ce "plan de formation" des données?
  – Comment démontrer un "business case"?
  – Quels sont les premiers pas?
  – Quelle organisation?

- Cette session vous permettra de découvrir des approches et techniques qui ont fait des succès des client IBM dans leurs projet.

Objectives

Discover some of the approaches and techniques available to improve data quality in your organisation

Agenda

- The impacts of information quality on the organisation

- The characteristics of a successful information quality approach

- Defining the terms

- The information quality roadmap

- How IBM and our business partners can help

- Conclusions

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Whatever your organisation, improvements to information quality management may have a profound impact on your organisation

Panasonic
ideas for life

- **10%** plus rapide dans la création et la maintenance des informations produit
- **€ 5 million** en réduction de coût annuel
- Réduction des erreurs de saisie de 5% to **0.1%**
- Réduction en « time-to-market » permettant une croissance de revenue de **3.5%**

Whatever your organisation, improvements to information quality management may have a profound impact on your organisation

LA TRIBUNE DU MANAGER

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LOGICIELS

Comment générer des données de qualité pour doper ses ventes

Le groupe de presse et d'édition Ouest-France rassemble les données clients qui sont dispersées dans différentes applications métiers. Objectif : construire une stratégie marketing plus ciblée et proche des clients... et accroître les revenus.

Dans la majorité des entreprises, les applications logicielles ne communiquent pas entre elles. C'est le fameux syndrome du «silo». À l'instar du groupe Ouest-France, éditeur du premier quotidien de France, qui souhaite pourtant passer d'une stratégie «produit» à une stratégie «client» afin d'accroître ses revenus en développant de nouvelles offres multicanaux. Dans cette optique, le groupe a voulu implanter un progiciel de gestion de campagnes marketing du français Neolane. Mais, au préalable, il lui a fallu maîtriser la qualité des données de ses deux millions

Enjeux sur les clients :
une augmentation des revenus
au travers d'un meilleure
connaissance et un dialogue
personnalisé

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Successful information quality ambitions have a common number of characteristics

1) They are part of on-going, business transformation, cost reduction and business insight initiatives and expressed in related measurable benefits

Business case

Performance indicators

Successful information quality projects have a common number of characteristics

2) They are based on organisational changes to support active governance processes
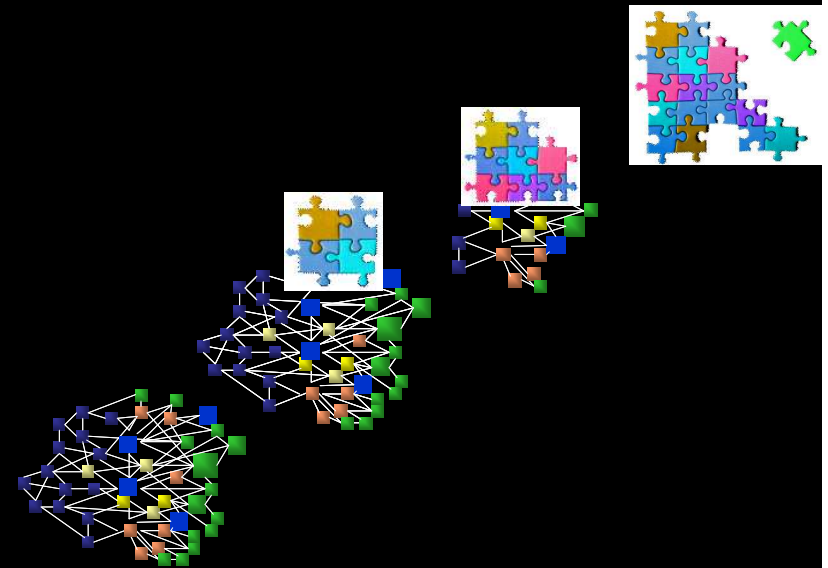
Management leadership

Governance council

Successful information quality projects have a common number of characteristics

3) They are based on skilled implementation methods and specialised tools that span the technical and business environments

IT strategy

Change management

Agenda

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Defining the terms

Information Governance

« …is the specification of decision rights and an **accountability** framework to encourage desirable behavior in the valuation, creation, storage, use, archival and deletion of information.

It includes the processes, roles, standards and metrics that ensure the effective and efficient use of information in enabling an organization to achieve its goals. »

Data Quality

« …is the fitness for a purpose of any type of data relative to the requirements of its usages within a process, application,…. »

Source : Gartner

Defining the terms

Master Data Management

« …discipline in which business and the IT organisation work together to ensure the uniformity, accuracy, stewardship, semantic consistency, accountability or the enterprises official, shared master data assets »
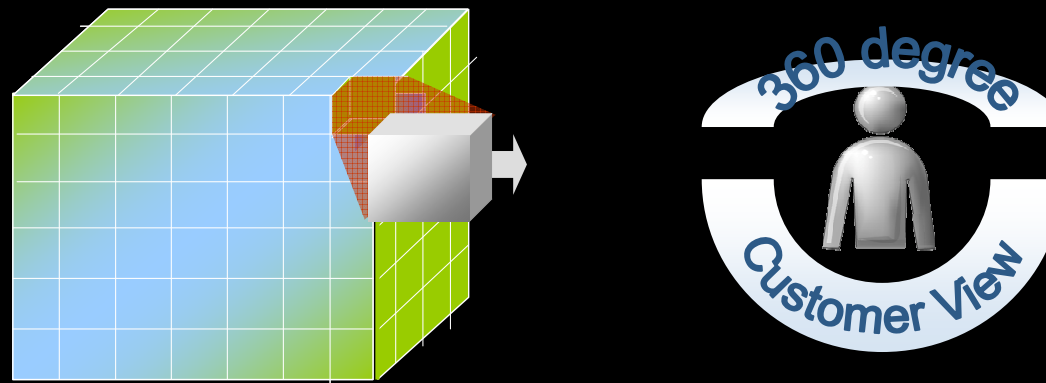
Source : Gartner

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Information quality projects are notoriosly difficult to start

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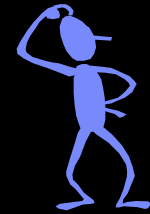- Data management costs are seen as part of IT costs

  How much is an accurate customer record worth?
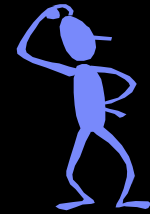
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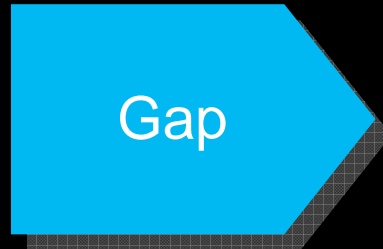- Data has become a strategic asset of today's organisation

IBM

Establish a simple but effective method of building value perception of your information

Where are we today?

Audit → Benchmark → Impact analysis → **Financial impact**

+

Where do we need to be tomorrow?

Gap → Impact analysis → **Financial impact**

How do we get there?

Roadmap → **Business case**

Where are we today?

Audit

Benchmark

Impact analysis

Financial impact

+

Where do we need to be tomorrow?

Gap

Impact analysis

Financial impact

How do we get there?

Roadmap

Business case

Key questions

- What?

- Where?

- How?

- Who?

- When?

Audit

IBM

- **What information?**

Volume of information

10
8
6
4
2
0

Importance of quality

Business impact

N° of data sources

N° of integration points

Customer
Product
Supplier

Audit

Who is a « customer »?

22
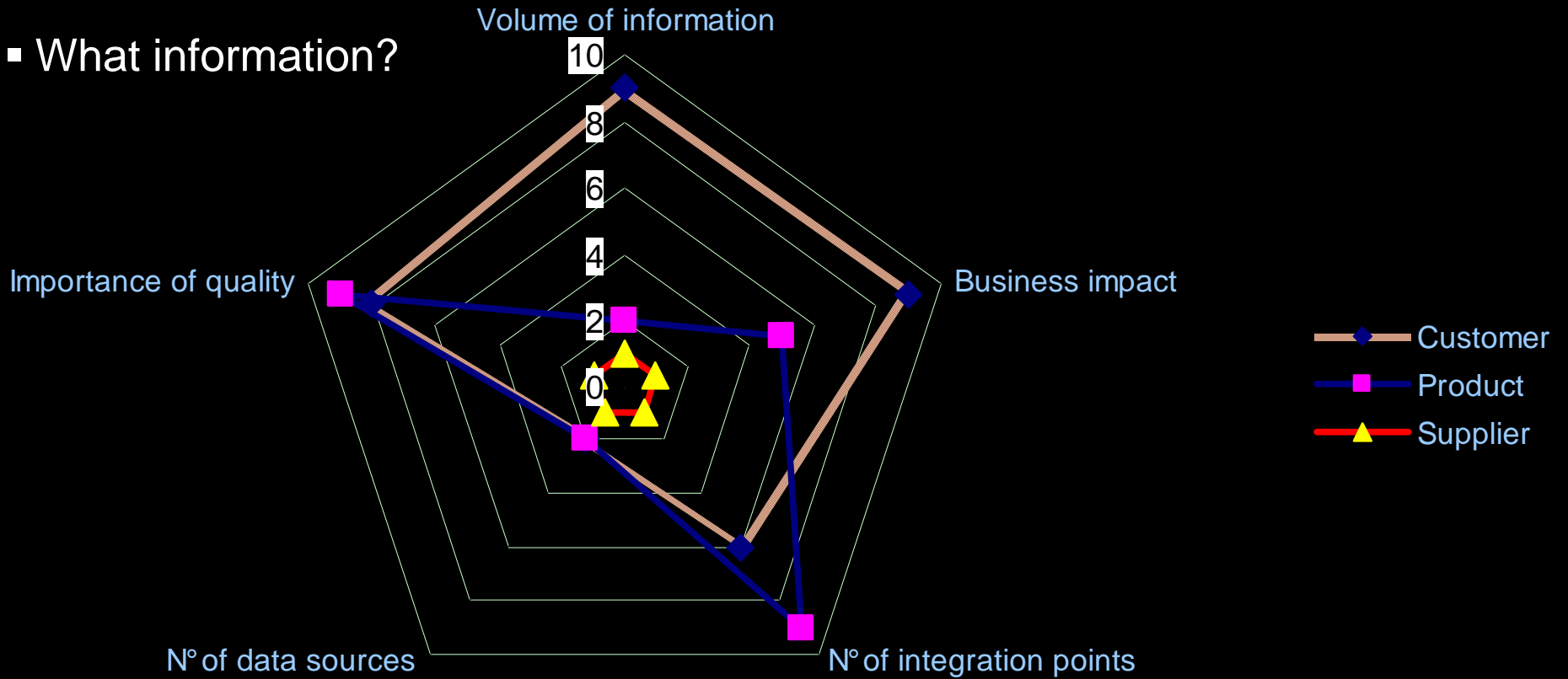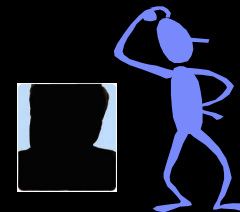
- Who creates, modifies or accesses it, how and for what purpose?

- How and where is key information shared?

	CRM			Finance		ERP		
	Sales	Service	Marketing	Risk & Compliance	Forecasting & Control	Ordering	Stock	Manufacturing
Customer	CRUD	CRUD	R	CRUD	R	RUD	-	-
Products	R	R	CRUD	R	R	R	R	CRUD
Supplier	R	RU	-	CRUD	R	RU	CRUD	-

C	Create
R	Read
U	Update
D	Delete

Audit

Are there different management schemes between operational and analytical information?

What effects does time have over the information managed?

What level of maturity do we have for information management?

KEY: ■ Aligned ■ Partially Aligned ■ Not Aligned

Business Focus	Information Architecture Assessment Focus							
	Information Strategy	Information Governance	Information Infrastructure					
			Data Security, Compliance and Privacy	Metadata Management	Content Management	Master Data Management	Information Integration	Business Intelligence, Perform Mgmt, Data Warehousing
	🟥	🟥	🟩	🟨	🟨	🟥	🟥	🟥
	🟨	🟨	🟨	🟥	🟨	🟨	🟨	🟨
	🟩	🟥	🟥	🟥	🟩	🟨	🟨	🟩
	🟩	🟨	🟨	🟩	🟩	🟥	🟨	🟨

STRATEGIC RECOMMENDATIONS

Audit

Where are we today?

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Benchmark

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Roadmap
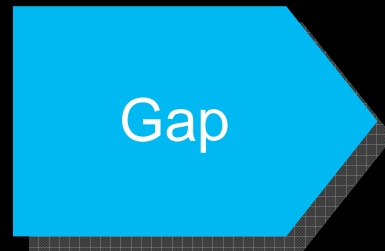
Business case

Benchmarks can be qualitative and quantitative

- Example quality metrics
  - DQI (Data Quality Index): Index ratio of data quality.
  - DAR (Data Availability Rate):Percentage of time that contracted data was available to "consumers"
  - DIR (Data Integrity Rate): Percentage of time that contracted data was trusted and reliable.
  - DER (Data Error Rate) Number of data errors

- Example business metrics
  - Industry averages
  - Organisational references
  - Competitor information
  - Analysts

Marital status
Divorced
Married
N
Separated
Single
U
Widowed
Y
No value
TOTAL
'not standa...

66% Invalid

Benchmark
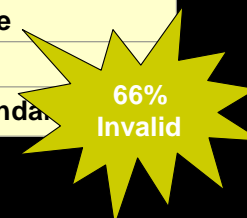
Analysts and system integrators have a wealth on information on their own project experiences

- Gartner : 50% of data warehouse projects will fail due to data quality
  - Source Gartner

- The Data Warehouse Institute (TDWI) : 55% of survey respondents identify data quality and security as top issue

- Your customer satisfaction?

Benchmark

Where are we today?

Audit → Benchmark → Impact analysis → Financial impact

+

Where do we need to be tomorrow?

Gap → Impact analysis → Financial impact

How do we get there?

Roadmap → Business case

The information challenge is growing rapidly

"ERP suites contain less than 30% of the total master data needed for the enterprise"

- Gartner Group

Continuing struggles with an explosion of information

Increasing complexity	Declining quality	Protecting privacy	Ensuring compliance
1 trillion	**$8.2 million**	**$204**	**$29.8 billion**
Connected devices in the world	Annual loss by average organization due to poor data quality	Cost per compromised record	U.S spending on governance, risk and compliance

Figure 2: It's not really news to say that we're living through an explosion of information. The fact that this paper exists, and that you're reading, attests a general dissatisfaction with the results the tools, methodologies and paradigms available to deal with this explosion.

Source: searchcompliance.techtarget.com

CNiL
Commission Nationale de l'Informatique et des Libertés

FATF•GAFI
Financial Action Task Force
Groupe d'action financière

Basel II

Solvency II

Gap

Multi-Channel sales, servicing & marketing

New product/service introduction

IBM

Where are we today?

Audit → Benchmark → **Impact analysis** → **Financial impact**

Where do we need to be tomorrow?

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+

How do we get there?

Roadmap → **Business case**

How does information quality impact your business?

Your financial performance?

Your sales performance?

Your operational efficiency?

Your ability to innovate?

Your ability to take decisions?

Impact analysis

Your customer?

Improvement objectives mapped to operational capabilities

Maximize marketing efficiency	**Minimize offer declines and minimize operational and capital loss from offer acceptance**	**Optimize account activation to enhance customer experience and speed product utilization**	**Cost effective outbound servicing & optimal satisfaction of inbound and outbound**	**Measure sales performance against plan**	**Accurately identify profitable customers likely to churn and treat proactively**

Objectives

Equip agents with timely information and predict customer service needs

Develop contact strategies for sales and service

Continuously measure customer satisfaction

Metrics

Increase cross-sell opportunity identification by 10%

Reduce web site channels from 10 to 1

Increase customer satisfaction score from 7 to 8 over 1 year

Capabilities

Unique, accurate and complete customer record across the business units

Unify selling analytics

Application of KPIs

Metrics

Reduce duplicated information by 30% across key customer related data

Impact analysis

IBM

Common business objections

« Our ERP should do this as its at the heart of
our organisation….and we spent enough! »

«…its an IT problem… »

« Didn't we just run a data quality project
on our markeing information? »

« …it all seems ok to me …»

Impact analysis

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How do we get there?

Roadmap → Business case

Organisations start governance and information quality initiatives from different places

- Enterprise Architecture Strategy
  - Cost reduction through more efficient usage of information sharing

- Business Analytics
  - Improve decision making capabilities

- Operational applications : CRM, Ordering, ERP, …
  - Improve or consolidate existing business processes
  - Implement new business processes

Roadmap

Actors and skills will vary depending on your project ambitions

- Organisational management

- Project and ambition stakeholders

- Change management

- Risk management

- KPI management

- Financial management

- Data Stewardship

- Technical Architects and Specialists

Roadmap

Organisational change

Eliminated 400k duplicate records

- Data governance council

Irish Life Customer Data Council

- Data stewards
  - Understand the data and its connection to business usage
  - Have a business function and not an IT function
  - Are responsible/accountable for data quality
  - Define policy for data management

Roadmap

Example cross organisational initiative aiming to provide uniform customer business proceses through DQM / MDM

```
                    ┌─────────────────────┐
                    │  Project Steering   │
                    │       Group         │
                    └──────────┬──────────┘
                               │
                    ┌──────────┴──────────┐
                    │     Programme       │
                    │      Manager        │
                    └──────────┬──────────┘
                               │
        ┌──────────────────┐   │   ┌──────────────────┐
        │ Client Technology│───┼───│   Data Council   │
        │      Board       │   │   └────────┬─────────┘
        └──────────────────┘   │            │
                               │   ┌────────┴─────────┐
                               │   │  Data Stewards   │
                               │   └──────────────────┘
```

| Core Project team | Business 1 | Business 2 | Business 3 | Business 4 |

Core Project team:
- System Experts
- Data Integration
- Data Quality
- IT Architecture
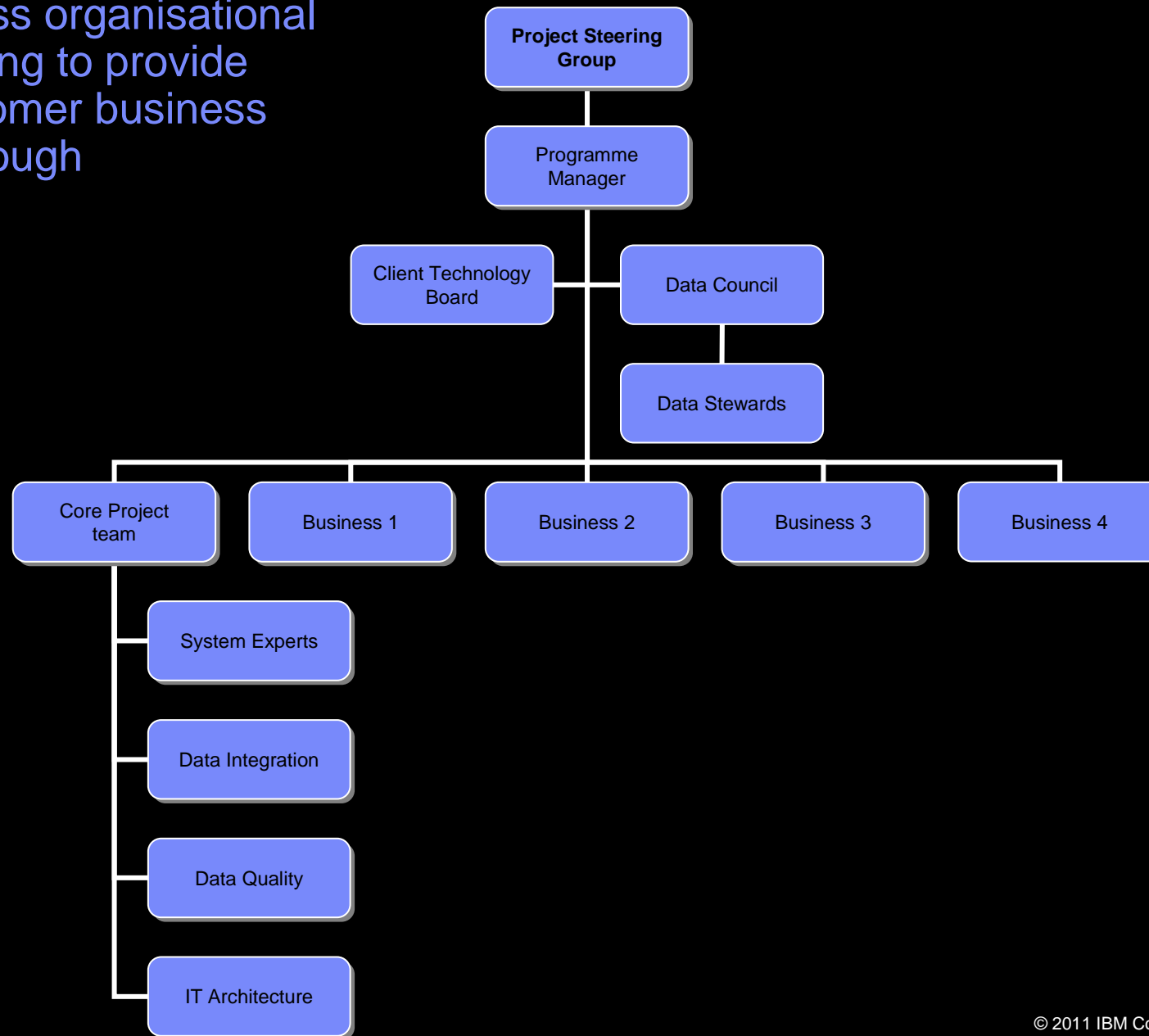
Roadmap

Functional and Technical evaluation areas
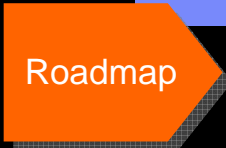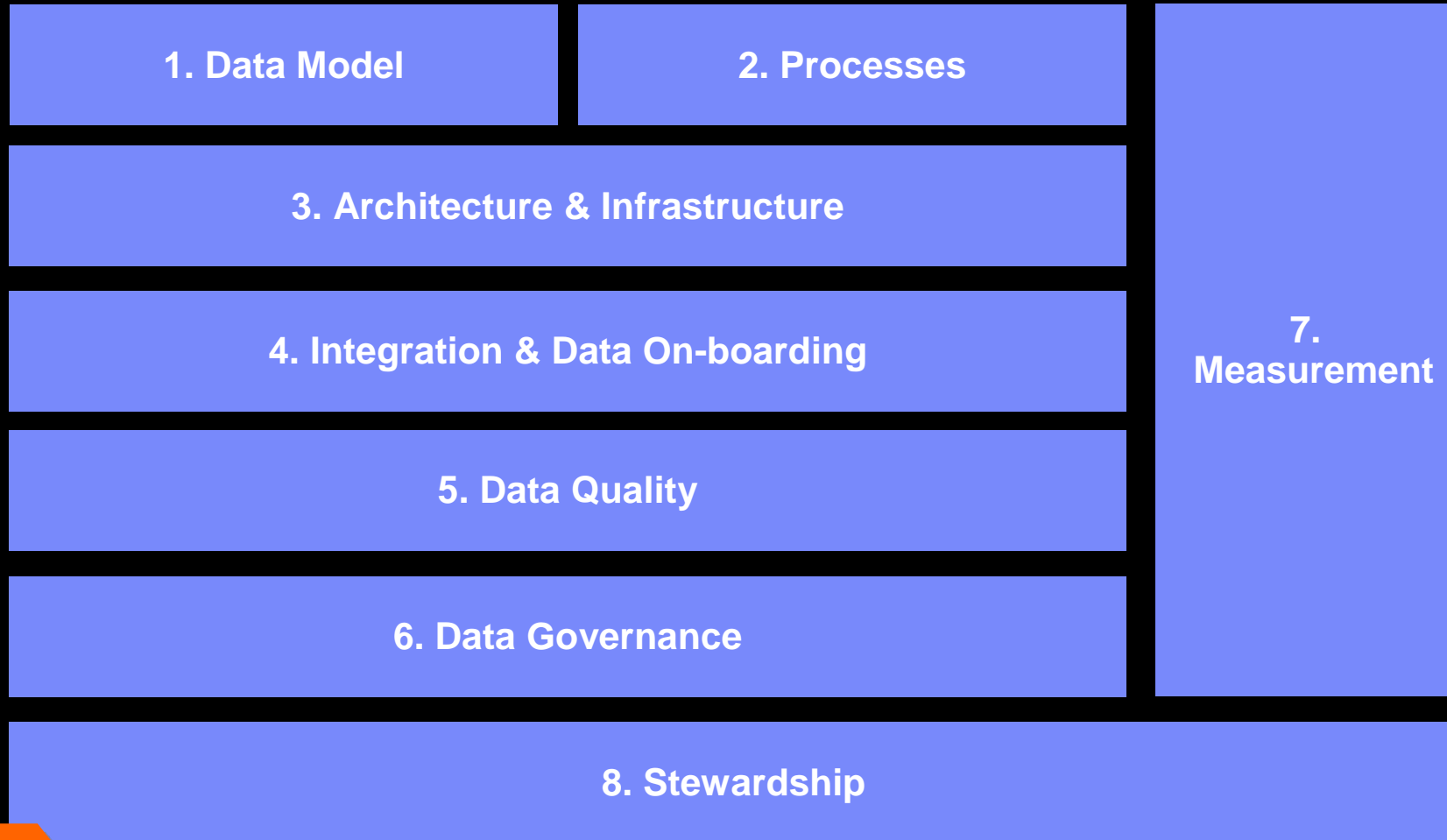
1. Data Model

2. Processes

3. Architecture & Infrastructure

4. Integration & Data On-boarding

5. Data Quality

6. Data Governance

7. Measurement

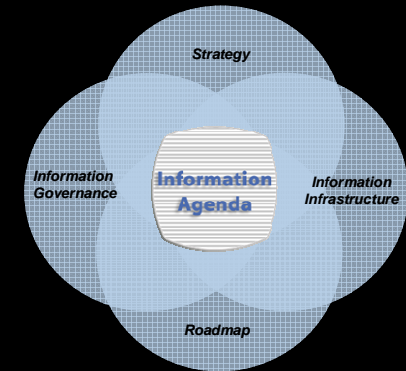**8. Stewardship**

Roadmap

IBM

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- Conclusions

IBM, and our business partners, can help you in identifying, quantifying and deploying solutions to enhance your business performance through improvements in information management

- **Information Agenda**
  - Establish outline strategy, business case and solution architecture

- **Data Quality Assessment**
  - Audit the current situation

- **« Proof of Technology »**
  - Understand the technologies applicable to helping provide solutions
  - http://www-05.ibm.com/fr/events/tec/

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Conclusions

Gain consensus in the problem before gaining consensus in the solution

Look to gain a common approach rather than a perfect architecture

Establish points of measurement based on existing sitiuation and future ambitions
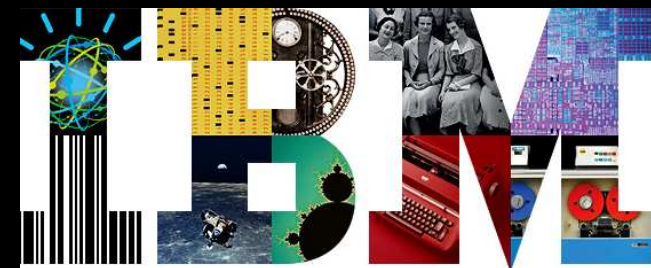
IT can be a significant enabler for adding value rather than being a « cost to business »

Anticipate organisations changes and how to influence them

Data stewardship should be placed on the business side

Business sponsors are sensitive to metrics and use cases

Ask for help!

IBM

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de l'Information :
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