



# How to Align Your Organization For Data Success

*A Whitepaper by First San Francisco Partners*

## How to Align Your Organization for Data Success

**The Definition of Alignment: understanding a concept from the perspective of others, or working individually towards a common goal.**

One of the biggest challenges in a data management initiative is aligning different and sometimes competing organizations to work towards the same long-term vision. It is very difficult to execute a data management program all at once, or as a “big bang” approach. Rather, the program should be deployed in phases over time, starting in one area and incrementally building out and adding value to the rest of the organization over time.

With a phased deployment or rollout, inevitably one group sees value in advance of others. Getting those groups who are impacted later in the deployment to get on board and stay on board is a challenge. In order for these groups to stay on board, each individual needs to go through an internalization process to accept the precedence that has been established by people or groups at the beginning of the enterprise deployment.

The process starts with learning about the data management program, and then the individual goes through a process of understanding why the program is of value to them, what is in it for them or why it makes sense - until eventually they accept the norm as their own point of view and continually create innovative ways to use it.

That is why a proactive approach to aligning the organization around a common goal and plan is critical when launching a data management program, and is a key contributor to the sustainability of the program.

An alignment workshop can be used prior to starting an initiative as a means to get a stakeholder group together, identify challenges, articulate value and identify potential starting points that could lead to a broad, successful enterprise-wide data initiative.

### The Alignment Workshop

Alignment is a key step in any change management initiative and is especially important to an organization that is trying to better govern and manage data. Many organizations struggle with getting a data program launched because of a lack of alignment.

To address this need, First San Francisco Partners has created an interactive cross-functional working session called the Alignment Workshop. The Alignment Workshop focuses on aligning stakeholders among departments, information technology (IT) and lines of business (LOB). The alignment process is critical to both the initial buy-in across stakeholder groups, as well as maintaining interest, momentum, investment and consequential long-term success of the data management initiative.

The Alignment Workshop is a critical vehicle for executive education of master data management (MDM) and data governance (DG) prior to starting an MDM and/or DG initiative. The workshop is just the first step, and should be viewed as an iterative process that an organization can use internally as the organization progresses with the change management initiative.

## Objectives of the Alignment Workshop

The workshop establishes and supports the understanding that different lines of business will benefit in different and synchronous ways from MDM and DG by:

- Aligning the benefits of MDM and DG across business and IT
- Assisting in the internalization process of the initiative's value
- Identifying stakeholder's goals, concerns and priorities
- Linking stakeholder's goals to the MDM and DG program deliverables
- Identifying metrics to measure the success of the program deliverables
- Translating those measurements into language that is pertinent to stakeholders

At the completion of the workshop, stakeholders create an initial communication plan that outlines the process and content to communicate with the stakeholder groups in a meaningful, sustainable way. The alignment workshop provides value to the organization by:

- Helping your organization think globally, and act locally
- Identifying common goals across departments
- Prioritizing the impact areas and quick wins
- Identifying and quantifying the value to the organization
- Assisting in the internalization process of the value
- Creating a continual "buy-in" process with all stakeholders
- Demonstrating how the deliverables can help the stakeholder groups achieve their goals and help address stakeholder concerns
- Determining how to measure the deliverables in ways meaningful to the stakeholder groups
- Creating an initial communication process to communicate progress to the stakeholder groups in a meaningful, sustainable way

## Key Components and Activities of the Alignment Workshop

The inputs to the Alignment Workshop include business and IT stakeholder goals and priorities. The outputs or outcomes of the workshop include an understanding of the value of the data initiative to the organization; understanding of the value of the data initiative to the roles within your organization; understanding of the success criteria and metrics required to measure progress and adoption; and last but not least, a communications plan.

The Alignment Workshop has five core components that build upon each other. For each component, key activities, inputs and outputs/outcomes are defined:

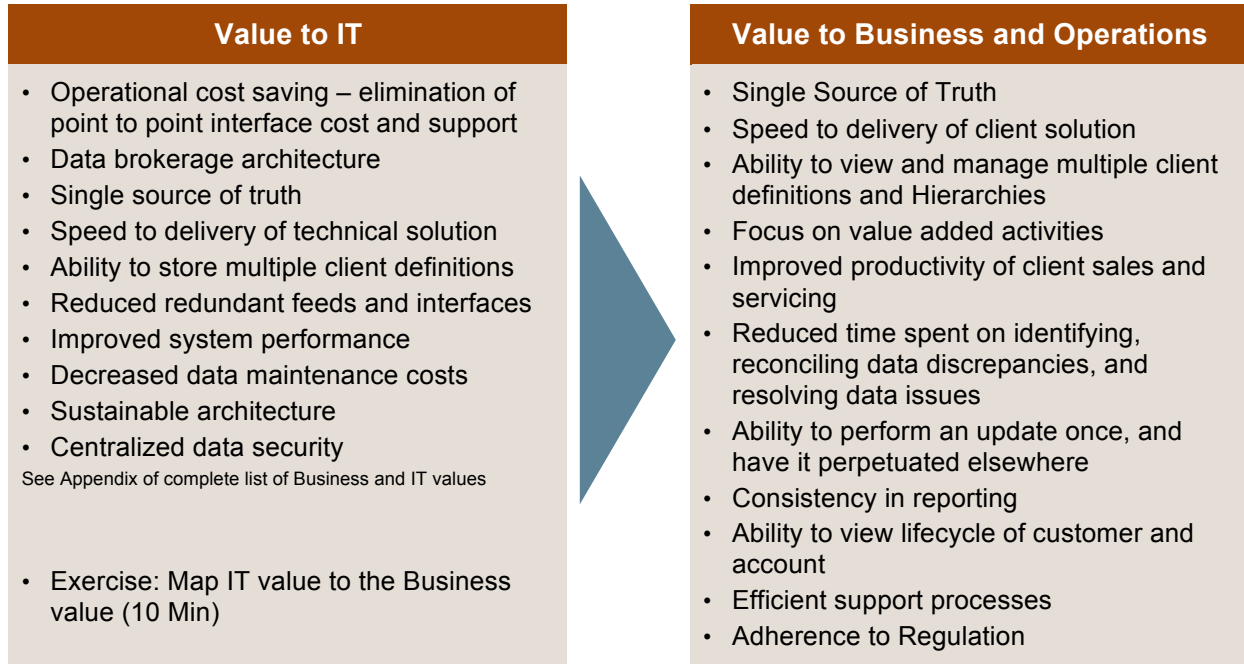
1. Confirming value
2. Confirming stakeholders
3. Creating linkages
4. Determining success criteria and metrics
5. Communicating messages

### 1. Confirming Value

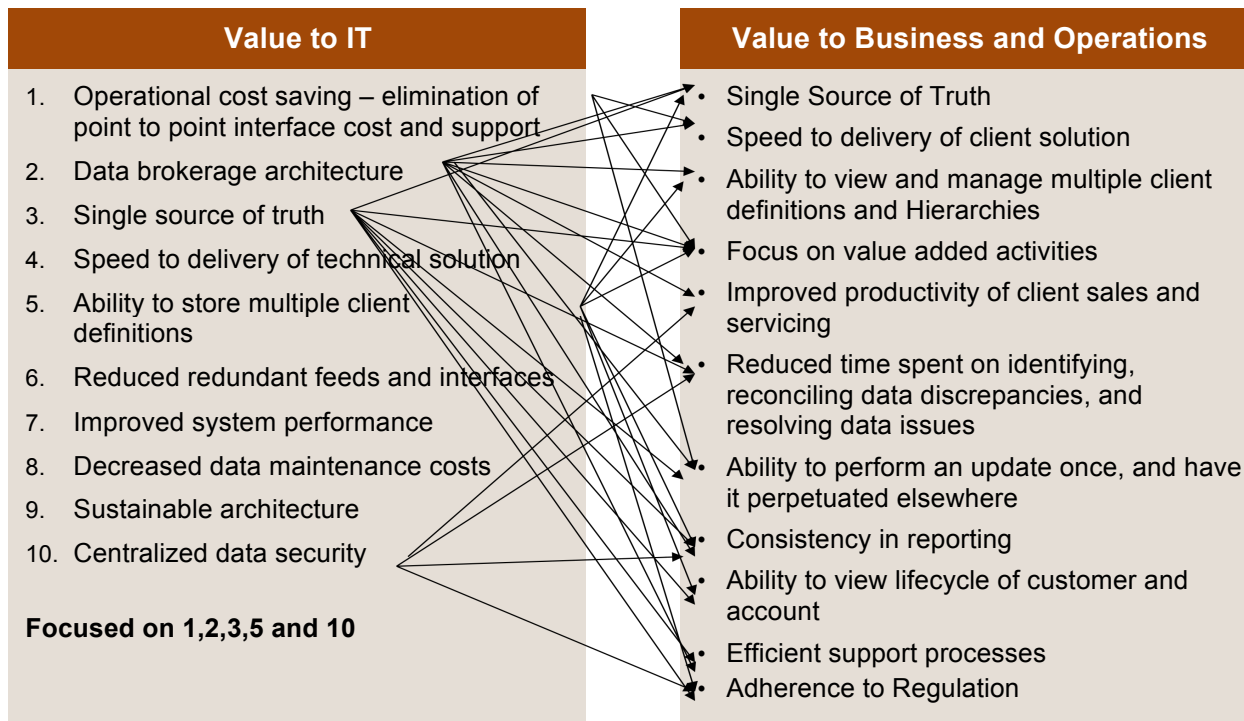
In this phase, the IT organization defines the value of the data initiative to the organization, and the business defines the value of the data initiative to the business and operational organization.

Once the business and IT define what values are important to them, the values are aligned through prioritization and mapping of these values. This illustrates and confirms that what is important to IT is equally important to the business.

The figure below depicts values that are important to both the business and IT organizations:



The figure below depicts aligned values through mapping and prioritization (in this case, the focus is on items 1,2,3,5 and 10)



## 2. Confirming Stakeholders

In this phase, a stakeholder analysis framework is used to guide the activities in the process of understanding stakeholder participation and goals. The stakeholder analysis activities occur simultaneously, while informing and reinforcing each other to come together in a final Stakeholder Management Plan.

The first step is to understand stakeholder support and the stages of enrollment along an adoption spectrum - then identify and understand any gaps. The framework identifies obvious and clear gaps in stakeholder engagement. Subsequent change strategies can then be put in place to close the gaps. By focusing on the gaps of those groups that are most impacted and influential to project success, a prioritized change strategy begins to take shape.

Once the stakeholder groups and level of enrollment are identified, stakeholder drivers, goals, concerns and items to avoid along with the implications of not achieving these goals are identified. The goals are then prioritized and ranked. The team can then focus on critical and high ranked goals. Following is an example for a typical stakeholder group for a customer data program, global account management group:

The figure below depicts prioritized goals and concerns for a global account management stakeholder group:

Stakeholder	Goals	Concerns / Things to Avoid	What if goals are not achieved
<b>Global Account Mgmt.</b>	<ul style="list-style-type: none"> <li>• Create a consistent Account Opening Process</li> <li>• Improve Partner Efficiency</li> <li>• Improve Client Service</li> <li>• Comply with all regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Insufficient resources with the appropriate skillsets</li> <li>• Inaccuracy of reporting</li> <li>• Length of time it takes for a client to get access online after opening an account</li> <li>• Don't want to take on too much at once</li> <li>• Redundant data entry in multiple systems</li> </ul>	<ul style="list-style-type: none"> <li>• Partner frustration</li> <li>• Client frustration</li> <li>• Regulatory fines</li> <li>• Loss of reputation</li> </ul>

### 3. Creating Linkages

Linkage is the tactical process of mapping delivery of a solution to the issues important to the stakeholders. Linkage is achieved when you can link stakeholder goals to the data program deliverables and can clearly demonstrate how the data program helps that stakeholder meet their objectives.

The top three data program deliverables are identified for each stakeholder, and mapped to what each stakeholder had previously identified as important to them and why. The stakeholder articulates how those deliverables can help them achieve their business goals.

As an example, below are 3 typical MDM program deliverables that are important to a global account management stakeholder group:

#### 1. Operational Governance Model

- Standardized policies and processes
- Accountability and ownership
- Pertinent measurement and monitoring
- Ability to proactively address data quality issues
- Provide high quality client and account data
- Auditability and improved reporting
- Improved understanding of how data is entered, maintained, changed; and how it flows through the company

#### 2. Single Point of Truth - MDM hub

#### 3. Enterprise Data Broker

- Single point of contact for applications supplying client and account data
- Single point of contact for data consumers, applications and individuals

The figure below depicts the global account management stakeholder group’s prioritized goals and how they are linked to the MDM and DG program deliverables:

Stakeholder	Goals	Data Governance	Single Point of Truth/MDM	Enterprise Data Broker
<b>Global Account Mgmt.</b>	<ul style="list-style-type: none"> <li>• Create a consistent Account Opening Process</li> <li>• Improve Partner Efficiency</li> <li>• Improve Client Service</li> <li>• Comply with all regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Standardized processes for entering and changing data</li> <li>• Ensure that appropriate privacy policies are created and enforced</li> <li>• Manage competing / conflicting uses of client data</li> <li>• Increased knowledge of data ownership and accountability</li> </ul>	<ul style="list-style-type: none"> <li>• Increased throughput and validation of data for clients</li> <li>• Foundation for multiple client definitions</li> <li>• Trust that the data driving downstream processes is accurate</li> </ul>	<ul style="list-style-type: none"> <li>• Manage the various processes/systems that leverage core client data to create different views of a client</li> <li>• Eliminates segregated databases</li> <li>• Standard process for leveraging client data</li> </ul>

#### 4. Determining Success Criteria and Metrics

The right metrics and measurements help maintain alignment. Metrics define the requirements that the information stakeholders need to answer; questions like what is the number of hours spent investigating and cleaning data? A measurement articulates how the data is reviewed, tracked and reported on for an on-going basis.

It is important to ensure there is some way of measuring progress towards stakeholder goals. Identify information that stakeholders need to track and map those measurements to their own goals so they can easily understand how the data program is helping them achieve their objectives.

##### Choosing Success Criteria and Metrics

Metrics are identified by:

- Outlining the MDM and DG deliverables
- Identifying how each deliverable will be measured
- Identifying the targets each stakeholder would like to reach
- Identifying how frequently each metric will be measured

Continuing our example from above, the figure below depicts initial metrics and measurements for the global account management stakeholder group:

Deliverable	Measurement	Target	Frequency
Operational Governance Model	<ul style="list-style-type: none"> <li>• Simplicity of Data Governance model improving over time</li> <li>• Level of adoption of the data governance committee program and enterprise data standards</li> <li>• Continuous improvement (collect and analyze feedback and incorporate lessons learned)</li> </ul>		<ul style="list-style-type: none"> <li>• Surveys-Initially quarterly, moving to annually</li> <li>• Simplicity – Monthly</li> <li>• Level – Monthly</li> <li>• Continuous - Monthly</li> </ul>
Enterprise Data Broker	<ul style="list-style-type: none"> <li>• New initiatives utilizing the brokerage services</li> <li>• # of subscribers to MDM</li> </ul>	<ul style="list-style-type: none"> <li>• 80%</li> <li>• 70%</li> </ul>	
Single Point of Truth	<ul style="list-style-type: none"> <li>• Decreased costs for new initiatives</li> <li>• Improved confidence in level of reporting</li> <li>• # of hours spent investigating/cleaning data</li> <li>• Increased client satisfaction</li> <li>• Reduced returned mail</li> <li>• Elimination of reconciliation reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Reduce returned mail by 30%</li> </ul>	

## 5. Communicating Messages

A communication plan is a written document that helps an organization achieve its goals using written and spoken words. It describes the What, Why, When, Where, Why and How of a program and is meant to be bi-directional.

### Importance of a Communication Plan

- Gives the working team a day-to-day work focus
- Helps stakeholders and the working team set priorities
- Provides stakeholders with a sense of order and controls
- Provides a demonstration of value to the stakeholders and the business
- Helps stakeholders support the data program
- Helps to protect the data program against last-minute demands from stakeholders

Once the metrics and measurements that map to their professional and personal goals are defined, the next step is to identify who needs to be communicated to? What information is important to them? How frequently should they be updated? What is the method of communication? Who should be communicating the message? Below is an example of the components of a communication plan:

### Components of a Communication Plan

Communication Plan	Stakeholder: XXX
Qualitative Information	Any general qualitative information that I would like to receive related to this deliverable
Quantitative Information	Of the quantitative metrics that have been defined, which are the ones I would like to be informed about AND how do I want the metric communicated to me to make the message pertinent
Frequency	How often do I want to be informed about progress
Method	What is my preferred mechanism of receiving the information

## Summary

The alignment workshop is a critical component of any large change management initiative. When either business or IT goals are not achieved, the organization may be impacted negatively – the alignment workshop mitigates this risk.

This white paper discussed what an alignment workshop is and why alignment in an organization is critical to any data program's success. It stated the value of the alignment process to both business and IT, and illustrated how stakeholder goals and priorities can be linked to a data program's deliverables. Further, the white paper discussed how metrics can be defined to measure and track the success of data programs, and how the creation of an initial, pertinent communication plan keeps stakeholders informed of program progress and accomplishments.

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