

ADOPTION

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Blend

Agile and traditional approaches to data governance

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Integrate
(meta)governance

7

Plan For
And manage resistance

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Measure
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Meaningful and accessible

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Early and often

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The right people at the
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Focus

On the value case

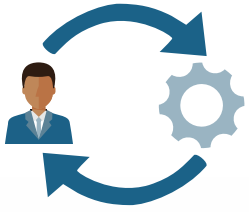


Nine Best Practices for Driving [Enterprise] Collibra Adoption

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Introduction

Congratulations! You've invested in enabling data governance and metadata management with Collibra.

Like any new initiative, successful data governance necessitates a change to an organization's culture in which people value, access and utilize the organization's data. Collibra provides an innovative solution for powering data intelligence with data governance at the core. While the tool itself is powerful, its real value is actualized when people choose to use it to do their work more efficiently and effectively. This choice is *adoption* – and adoption happens one person at a time. Driving adoption to achieve sustained value requires a concerted change management effort.

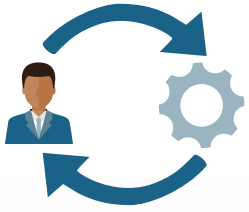
This choice is *adoption* — and adoption happens one person at a time.

Optimized value of Collibra adoption is fulfilled when it's embedded into "business as usual" processes of how people work on a daily basis, creating a sustainable need as opposed to just knowing it is one of many tools available.

Investing in new technology is expensive. In order to demonstrate a return on that investment, people must actually use the technology as part of their work. Most people will try something once when they are told to do so, especially if they are being watched to ensure they comply with the request. However, if the technology is hard to use or the use of it is not reinforced, people are less likely to continue using it. This approach of "managing by decree" is time-intensive for busy managers. It also can inspire people to rebel against the change, either through subtle resistance or outright sabotage.

According to the Association of Change Management Professionals, organizational change management is "a deliberate set of activities that facilitate and support the success of individual and organizational change and the realization of its intended business results." Essentially, it involves proactively implementing strategies and techniques to address the human side of change to achieve value for the organization.

First San Francisco Partners recommends starting organizational change management as soon as you choose to decide to purchase a new technology. Rather than managing by decree and punishment, you can engage people in the change process. In doing so, you can find out what is important to people, the reasons they would choose to adopt a new technology, and most importantly, how you can support them so they can



make the change most efficiently. In fact, Prosci's Best Practices Report found that implementations with change management met or exceeded project goals 77% of the time. Also, 96% of the projects with excellent change management achieved a 96% success rate. That is more than six times higher than other projects with little to no change management.

This process may not require significant financial investment, but it does require other resources such as time, attention and support. This guide provides nine best practices for driving Collibra adoption based on decades of implementing sound data governance, data management and fit-for-purpose technology implementations (including Collibra) for clients of all sizes and varying industries. By using these best practices, you can begin laying a foundation for meaningful, lasting change that drives sustained value from data governance with Collibra.

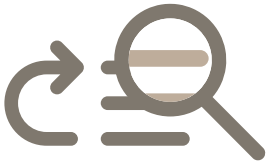
WHAT DOES COLLIBRA ADOPTION LOOK LIKE?

The adoption of a new technology happens along a curve, starting with no or limited use and ending with the technology being embedded in critical processes and procedures. As an organization moves along the curve, they become more mature in their use of Collibra. Adoption usually starts in a more reactive, rather than proactive, manner.

With Collibra, this means that the tool is stood up, configured, and a targeted group reacts to this implementation by using it. The next stage is the controlled spread of Collibra, rolling it out to targeted functional groups with efforts to increase data literacy.

As adoption spreads, Collibra is leveraged enterprise-wide in business use cases with measurable benefit. It is proactively used within the established use case. When Collibra is fully adopted, it is integrated into core project, analytic, and operational processes, enabling ongoing data literacy and data democracy.





Best Practice 1

Focus on the value case

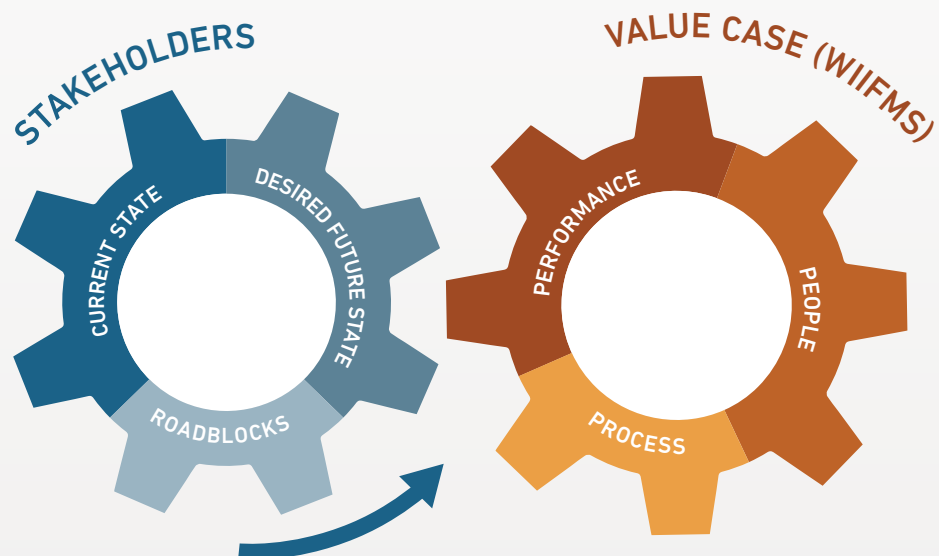
What is valuable varies by organization, team, and individual. The first step in focusing on the value case is to identify organizational goals, objectives, and priorities that will be impacted by improved data governance and metadata management. By starting with high level, overarching goal(s), you establish weight and meaning for the implementation, which will help engage leadership at all levels. It also helps to show the people doing the implementation how their work will impact the organization. This will help with ongoing engagement as well.

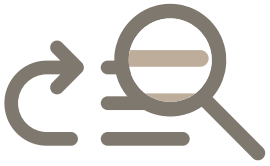
The first step in focusing on the value case is to identify organizational goals, objectives, and priorities

The next step is figuring out what groups will be impacted by the Collibra implementation. There will be a wide variety of people that could potentially be impacted — for example, some groups include executives making decisions about when to purchase the technology and where to implement it, teams that will be using it, and teams that will be implementing it.

To increase buy-in and drive adoption, it is important to figure out a value case for each of these groups. The value case answers the question, “What’s in it for me (WIIFM)?” Adopting new technology is an individual choice. Each person will have to choose whether or not they want to change the way they do their work to incorporate Collibra. They will only do this if the value of making the change outweighs the effort it will take to make the change.

The next step is to find out what is important to each of these stakeholder groups. The best way to do this is to talk to them. Ask questions about how they do their work and how it could be easier, better and faster if they had a data governance/metadata management solution in place. Try to focus on specific data challenges in the current state of operations and how the desired future state could be enabled with a data governance solution.





Ask questions such as:

What is the current state of their work around data and data governance? For example, how do they define and use metadata? How do they understand what data is used in reports? How do they search and access data sets?

What is their desired future state? How could things be better with an integrated data governance solution?

What is getting in the way of doing their work the way they want to?

If your stakeholders are not data-savvy, ask the questions in a way that makes it real to them in their work. As you talk with people, you are going to notice themes about what they want and their pain points. These themes lay the groundwork for your value case. More often than not, themes fall into at least one of these categories: performance, process, people, data and technology. Themes in any of these areas can become compelling value cases.

Theme	Examples
Performance: goals and measures that are important to the team	Strategic goals Key performance indicators (KPIs)
Process: work that is needed to achieve desired performance	Productivity Efficiency
People: how the implementation will impact individuals	Frustration Interdepartmental conflict
Data: what data is available and issues or challenges with that data	Availability and/or access to needed data Data issues such as reliability, integrity and trust in the data

GETTING LEADERSHIP BUY-IN

One of our healthcare clients was getting ready to implement Collibra. The Data Governance and IT teams were already bought in and excited to start the implementation. However, the business leaders were less interested in investing the time and resources needed to change their teams' processes to incorporate Collibra. We worked with them to identify these three value cases that ultimately helped the Data Governance team talk with business leaders about how Collibra would positively impact their teams.

Value Type

Value

Performance



Collibra will reduce turnaround time in delivering reports to customers

People will be able to find the data and reports they need faster using Collibra. According to a study done by the International Data Corporation, 69% of Collibra users reported taking less time to find reports/data.

Reducing the time to locate information will increase efficiency in delivering reports to customers.

Process



People will be able to find key information about the data they use every day.

Collibra is a searchable repository, where users can locate the data they need for their work and better understand its context.

They can also request access to that data using established processes to protect privacy and security.

People



Using Collibra will increase trust in data.

Data in Collibra will be identified and developed by Subject Matter Experts that are already trusted by data users.

That data will be vetted and organized using systematic processes to ensure only high-quality data is added to Collibra.



Best Practice 2

Engage the right people at the right time

Long before starting implementation, you want to engage a diverse group of business and IT stakeholders to make decisions and drive adoption. The true value of Collibra is actualized when it is used regularly by people in the business, so it is crucial to have both IT and business stakeholders represented during decision-making. The IT stakeholders understand how the tool works and what it can do from a technical perspective. The business stakeholders understand how Collibra will be used and how their teams can get the greatest benefit from it. Working together, these stakeholders can ensure that decisions are fully vetted using multiple perspectives.

Stakeholders can ensure decisions are fully vetted using multiple perspectives

The reason for engaging stakeholders from the very beginning is that people will support what they help to create. You want these stakeholders involved in decision-making so that they will feel a sense of ownership over the implementation and its success. There are a wide variety of decisions that will need to be made throughout the implementation.

Your stakeholder group can help to answer things such as:

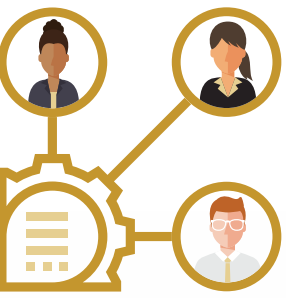
What type of information should go into Collibra?
Who should have access and when should that access be granted?

What, how, when to communicate about Collibra?

What resources should be allocated? When and how should they be distributed?

For your initial stakeholder group, focus on the people closely tied to the initial Collibra implementation, the group(s) that will get to start using Collibra as soon as it is configured and ready to use. You will want to include people who are able to make decisions about resources and have authority over the initial user groups. That way once decisions are made, they can be carried out efficiently.

The stakeholder group will be one of your key sources for information and communication throughout the implementation cycle. Work with them to identify value cases and validate any assumptions you have about how the implementation will affect their teams. Also, have them identify user stories, how using Collibra is impacting people on their teams. They can be the biggest supporters



of successful implementation as long as you keep them engaged in the process.

Following the implementation, do not disband this group. Instead, change the focus of their responsibilities. Throughout the implementation, you built a sense of ownership by asking questions and acting on their recommendations. For ongoing engagement, work with this team to identify ways to continue momentum with their teams. Have them share user stories with other groups and identify the ongoing benefits of Collibra for their teams. They can also provide insight into which additional teams may benefit most from Collibra in future implementations.

Another group that could be particularly helpful during a Collibra implementation is a "Change Team." A Change Team is made up of a small group of individuals (5-8 people) on the front lines using the new technology. Often called Change Champions, they essentially become the "go to" individuals for colleagues with questions and concerns. Change Champions can be anyone! The key is to find people who have influence, not necessarily formal authority, among frontline Collibra users. Because they work closely with other Collibra users, they can identify issues "on the ground" and raise them quickly for resolution. They can also provide feedback on communications, training, and any other change management activities. Change Champions become your experts on the user experience and operational impact of Collibra, often providing feedback and recommendations far faster than any more formal data collection approach. They also provide an additional level of encouragement, support, and reinforcement for the change among their peers. Depending on how your Data Governance capability is structured, the Change Team could be an explicit part of your Data Governance organization, but doesn't have to be.

PRO TIP

Facilitate Decision-making Sessions

Everyone has too many meetings on their calendar and sometimes meetings overlap. A great way to make sure your meeting is well attended is to focus on decision-making rather than progress reports. Everyone's time is valuable, so you want to use meeting time for things that can't just be sent in an email (like a progress report). Focus on discussions and key decision-making.



To make the most of your meeting time, identify decisions the group needs and use them to make an agenda that is sent out at least 24 hours before the meeting. This way participants can think about the decisions in advance and bring any necessary supporting documentation for their opinion. During the meeting, facilitate discussion and have the group come to a consensus.



Best Practice 3

Align technology adoption with change management

If users don't adopt new technology, it is a waste of time, energy and resources. A successful Collibra implementation means a change to culture, roles, processes and policies. Changing that culture means you are asking people to think and behave differently about how information is accessed and used. Change management can be used to drive a successful implementation, support adoption and manage resistance to help you achieve greater value faster.

Successful implementation means change to culture, roles, processes and policies

Implementation

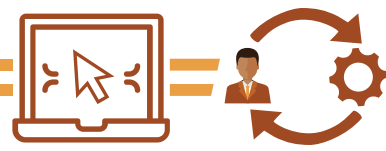
Using change management can have significant impacts on technology implementation. The Project Management Institute (PMI) conducted a study that found 14% of technology projects fail, but that number only tells part of the story. Of the projects that did not completely fail, 31% did not hit their goals, 43% exceeded initial budgets, and 49% took longer than projected. By using a structured, organized means to address the human side of change, you can support people in a way that allows them to make the change more quickly and successfully.

Adoption

Gaining adoption requires new knowledge, new skills and a commitment to try something new. Training can help with developing the knowledge and skills needed to integrate Collibra into daily work. However, training is usually a discrete event and may not be enough to gain user commitment and drive adoption. Change management goes beyond the in person or virtual classroom to provide support and promote adoption. Use a combination of measurement, communication and stakeholder support to proactively identify and deal with change management issues that enable the implementation team to address risk areas and increase the speed of adoption.

Resistance

Resistance is a natural and normal part of the change process. How you choose to manage it determines just how long people will resist the change. Using change management allows you to plan for resistance and preemptively address a lot of reasons for why people will resist the change.



This shortens the time and reduces the energy people put into resistance, allowing them to adopt the change faster. You can also put strategies into place to address issues efficiently when they come up so that people no longer have a reason to resist the change. For more information about a comprehensive feedback loop to manage resistance, please see Best Practice 7: Plan for and manage resistance.

Change management requires a multidisciplinary team. Technology teams are experts in IT solution design, how technology works, and how to solve technical issues. But technology teams cannot be experts in everything, so they need to partner with others to get support for the change management effort. Change management is about directly interacting with impacted stakeholders to ensure that the new technology is meeting their needs and they have the resources needed to adopt the technology.

Change management requires a multidisciplinary team

Many organizations have established teams or departments for organizational development, learning and/or HR that can help manage the change effort. We have worked with many teams as a liaison between IT departments and business partners to establish pragmatic approaches to resistance management. Some examples include education for managers about addressing resistance, establishing communication plans, and setting up multiple feedback loops for issues around the implementation. There are many other approaches as well, so it is important to find the right ones for your organization.

A Change Management team can:

- ✓ Coordinate communication
- ✓ Identify specific training needs
- ✓ Advocate for adoption resources with leaders
- ✓ Manage risk
- ✓ Connect the implementation activities to organizational priorities
- ✓ Work with leaders to establish buy in and engagement



Communicating with stakeholders is the best way to understand their requirements

Best Practice 4

Communicate early and often

Two-way communication is key to enabling adoption. Communicating with stakeholders is the primary mechanism to let them know what's happening in the implementation, share expectations about how established processes will change, and reinforce new processes. Communicating with stakeholders is the best way to understand their requirements, how the implementation will affect them, and if there are any challenges that need to be solved.

The first step in adoption communication is to identify your stakeholders. A broad definition of stakeholders is anyone who will be impacted by the implementation. That includes leaders, IT teams doing the implementation, users, and sometimes even customers. How many stakeholder groups you identify will be based on the scale of your implementation.

There are many different things that need to be communicated throughout the course of the implementation and it isn't possible to list them all here. But to get you started, here is a list of the most important things you will want to communicate:

1 Schedules and timelines. People need to know when they will be expected to make a change so they can plan for it. Make sure that people know about key dates so there are no surprises. And if those dates change, let people know about the change as soon as possible.

2 WIIFMs or “What’s in it for me.” Change is a choice – people can choose to change the way they do their work or not. Showing how the change will benefit them specifically will go a long way in compelling them to make a change.



3 Mitigation plans. Change also causes disruption. Everyone going through the change knows that issues will come up. Communicate that you have a plan to address those issues and how people can get help. This shows that you are being mindful of the realities of the change and its potential impacts.

4 User stories. User stories are a compelling tactic to support adoption, because they show that you are delivering on your promises. Before the change happens, you make the case that people will benefit from making the change. User stories prove out that case by showing how real people realize those benefits.

5 Wins. As soon as possible and as often as feasible, communicate positive impacts to the organization, departments, and individuals. Showing people real-life and real-time benefits is an effective way to reinforce the case for change. Think of adoption like a snowball and wins as individual flakes. The more wins you have, the larger the group of adopters will be. The faster people see wins, the quicker adoption happens.

You can also use a wide variety of communication approaches to share information and learn from your stakeholders. It is important to communicate through established mechanisms because people have habits for finding the information they need.

Using established mechanisms takes advantage of those existing habits. It is also a good idea to use new and novel approaches because that draws attention to your message. By combining established and novel approaches, you will more effectively and efficiently reach a wider variety of stakeholders.



Communication Approaches Include:

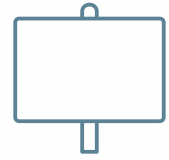
There is a wide variety of communication approaches that you can use to share information



Newsletters



Implementation website
(e.g., SharePoint site)



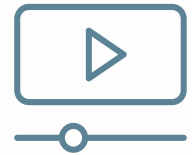
Signage



Lunch and learns



Town hall forums



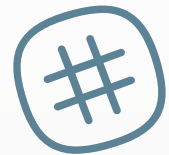
Videos



Established meetings



Social media



Internal messaging
application (e.g., Slack)



Classes



Swag (brand your implementation and pass out stickers, badges, buttons, candy etc.)



Lunches or coffee breaks
for more focused conversations (especially with key stakeholders)



Infographic



Blogs



Announcement/updates to
company dashboards or
intranets

COMMUNICATION IS KEY

Projects with efficient and effective communication approaches perform almost twice as successfully on many key measures. The secret to efficient and effective communication is tailoring it to your audience, essentially saying things in a way people can hear them. We have worked with many clients to identify communication preferences and designed innovation communication strategies to address them. Some examples of effective communication strategies we have used include:

1. We created an **engaging infographic** for a multinational organization with fun and interesting brand standards. Working with their marketing team, we created messages about data governance and privacy that were understandable and relatable for people at all levels of the organization.
2. We worked with a healthcare organization to establish a **two-way feedback mechanism** for people to get quick answers about specific data governance-related questions. This allowed users to get answers to questions as they came up, which reduced anxiety and frustration with new processes. It also helped the implementation team identify process improvements.
3. We used **short videos**, shot with iPhones, uploaded to an organization's intranet site to keep users and leaders updated about progress on the implementation. This was a novel approach for the organization and it was particularly effective because it built personal connections between users and the implementation team.



PRO TIP Don't Underestimate the Ongoing Marketing Effort



Successful technology implementations require extensive, ongoing information sharing.

Partnering with your Marketing Department to brand and communicate about Collibra within your organization can dramatically impact how quickly people learn about and adopt Collibra. People in your Marketing Department are experts in crafting meaningful messages and delivering them in ways that make sense for the intended audience.

In addition to communication support, the Marketing Department can help you build a brand around the use of Collibra within your organization. A brand involves a visual identity including things like fonts, graphics, and colors. Most organizations have lots of messages being communicated across a number of channels every day. This level of chatter can cause people to tune out. Putting together a brand for your program makes it more visible and helps people hear your message more clearly.





Best Practice 5

Make training meaningful and accessible

No one likes to sit and listen to a long, boring lecture, and complex technical manuals will only sit on the shelf collecting dust. In order to drive adoption, training and learning materials must be both meaningful and accessible. Meaningful training provides people what they need to know and do in a way that is interesting for them. Accessible training is available when people need it.

Training and learning materials must be both meaningful and accessible

All training should start with a needs assessment. This does not need to be an onerous process! The goal is to answer some fairly simple questions in order to make decisions about training design and approach.

Some questions to think about during a Collibra implementation training needs assessment include:

What, if anything, do they already know about Collibra?

What Collibra functionality will they be using?

How will they be using it during the course of their daily work? This includes both processes and use cases.

What type of training do they want? This includes questions about training approach (e.g., virtual, in person) and training materials (e.g., tip sheets, process maps).

Keep in mind that training does not necessarily mean sitting in a classroom. Broaden your definition of training to any event or instance where people learn about Collibra. By doing this, you will actually conduct training in more efficient and cost-effective ways. Instructor-led in person sessions are great, especially for kicking off a new technology. Unfortunately, this is also the most expensive form of training. During



your training needs assessment, try to identify other ways to approach learning, like videos, printed materials, demos in the cafeteria during lunchtime, information sessions, presentations at standing meetings, and even having help desk support when issues arise can be alternative approaches for learning. A group approach is also helpful and efficient when training is tailored to specific business needs (e.g. Collibra training for admins vs. data stewards vs. executives etc.)

When designing meaningful learning objectives or topics to cover, it is important to focus on how people will use Collibra. While terminology is important, it is only meaningful in the context of what people will do with the things you are defining. The key to meaningful learning is to design it with the participants' work and needs at the forefront.

The key to meaningful learning is to design it with the participants' work and needs at the forefront

First San Francisco Partners often recommends customizing training by user group to ensure that the right topics are covered for the right people at the right time. For example, with one multinational healthcare organization, we segmented user groups by what they would be doing in Collibra: Users, Data Stewards, and System Administrators.

We created a scaffolded curriculum where sessions were built on knowledge and skills developed in previous sessions. Everyone attended the first session with the most basic knowledge about new data governance processes and how to use Collibra in their daily work. Data stewards and system administrators attended the second session with more in depth information. There was a third session designed specifically for data stewards that contained more business-related information that they would need to carry out data governance and metadata management functions. Rather than attending the data steward sessions, the system administrators received in-depth technical training and knowledge transfer so they could continue to configure and maintain Collibra.

By focusing on specific user needs, we reduced the number of total training hours while increasing training effectiveness. General users were not overwhelmed with details they didn't need, nor were they expected to participate in more than 45 minutes of training. Data stewards and system administrators, on the other hand, received more training, but it was more focused on the topics they needed and fewer people participated.

As you develop training, the best thing you can do is make it as active and

General Users

Data Stewards

System Admins

Session 1: Basics of Data Governance and Collibra



Session 2: Advanced Topics in data governance, meta data management, and Collibra



Session 3: Data Governance and Metadata Management processes

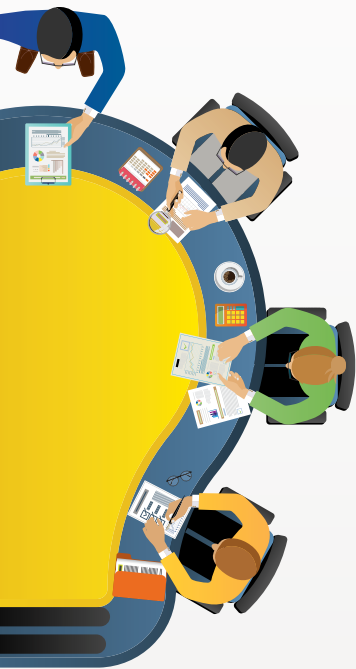


Session 4: In-depth technical training and knowledge transfer to configure and maintain Collibra



tangible as possible. Let people into a Collibra environment to explore and keep them engaged with practice exercises. Also, focus on solving problems. When developing practice exercises and activities, think about problems that they will need to solve as part of their daily work and have them solve those problems themselves using Collibra. For example, a very real issue resolved by Collibra is quickly and easily finding who to contact about a specific data source. So, have them locate a data element and identify who to talk to about it.

Accessible training is available when people need it, even if a teacher is readily available. If you do in-person training, be sure to schedule it at a time that people are actually at work. This becomes particularly relevant at organizations where people who use Collibra work in different time zones or different shifts. Also think about what learning resources will be available following training. Complex technical manuals will frustrate people. Think about making other resources available, like videos, tip sheets, process maps, and checklists. Also, have a resource to answer questions. This could be a specific person, a ticket system where people can log questions, or a helpline. Having help and support available when people need help will reduce frustration and promote positive experiences with Collibra.



PRO TIP Try Gamification



Gamification means applying game concepts into training programs and learning events. It is a relatively new trend in training design, and it has shown remarkable benefits including more efficient learning, motivating people to learn and engaging participants throughout training. To gamify training, try incorporating some of these techniques:

- Provide challenges for people to figure out. Once they complete the challenge, they move on to the next, more complex one.
- Use rewards to provide feedback. A reward can be as simple as telling people they did a great job. You can also incorporate badges for significant achievements.
- Incorporate points and scores. Accumulating points is a great way to foster a feeling of accomplishment. People can achieve points by completing tasks such as answering questions, finishing individual steps of a process, or locating something within Collibra.



GOAL



ACHIEVEMENT



CHALLENGE

PRODUCTIVITY



SKILL

GAMIFICATION



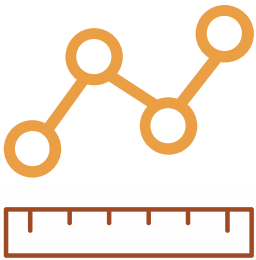
LEARNING



USER ENGAGEMENT



REWARD



Best Practice 6

Measure impact and progress

Metrics are a great way to communicate expectations, value, and progress. However, in the words of Einstein, “Not everything that counts can be counted, and not everything that can be counted counts.” Supporting adoption with measurement means identifying and counting what counts to the implementation stakeholders.

Impact metrics answer the question, “How is this improving our business?” When identifying impact metrics for the Collibra implementation and adoption, think about how it will impact what matters most to the organization as a whole. Often impact metrics relate to strategic objectives and/or the value case you establish for Collibra. Usually these metrics fall into the categories of revenue enhancement, cost containment, or risk mitigation. These metrics help you quickly describe the value you are trying to bring to the organization.

Impact metrics answer “How is this improving our business?”

Progress metrics answer “are we moving toward success?”

Sample Impact Metrics Include:

- Better, more efficient decision-making
- Reduced regulatory costs associated with data governance
- Increased market share due to more accurate analytics

Progress metrics answer the question, “Are we moving toward success?” Progress metrics show incremental progress toward your overarching goal. They are often easier to identify because they are visible and related to what you are doing to reach that goal. They also tend to be things you can watch happen and easily count. However, as lagging indicators, they will not tell you if you are actually creating value. They will only show you what you are doing to create value.

Sample Progress Metrics Include:

Goal

Metric

Collibra adoption

- % of business users accessing Collibra on a weekly basis
- # of Data Sets / Business Terms loaded over time

Collibra implementation

- # of configured domains
- Time to configure domains

Establish MetaGovernance

- # of issues escalated and resolved
- # of approved and implemented standards, policies, and processes
- # of data owners and stewards identified

Progress metrics also measure those activities that lead to the impact metrics. Since the number of things that can be measured can feel overwhelming, Impact metrics help to guide which progress metrics are important, and help to identify which progress metrics may be less meaningful.



To drive adoption and demonstrate value, you need to share your metrics and incremental results. Sharing incremental results is a great way to engage people in the adoption effort by communicating and reinforcing expectations. More often than not, when people know expectations, they will work to meet them. Measures are essentially shorthand for expectations, the outcomes you hope to achieve by taking an action. By reporting measures regularly, you show people that they are working toward a common goal and that their performance matters.

Sharing incremental results also builds accountability. It is common knowledge that what gets measured gets done. Often when people know that their performance is being monitored, they try to do a better job over time. Sharing incremental results helps them make that improvement because they allow you to identify necessary improvements and resource needs.

PRO TIP Make an Adoption Dashboard

An adoption dashboard is a meaningful, useful tool to report progress and build transparency about your implementation. All the metrics that matter most are in one place rather than spread across multiple systems and spreadsheets. Dashboards present results from tracking those metrics in a way that is relevant, accurate, and easy to understand.

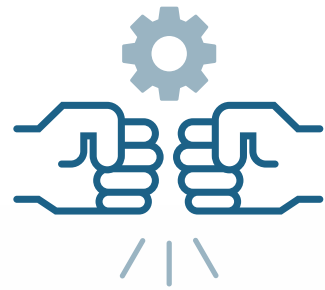
Here are some common features of useful dashboards:



- **Relevant:** Before jumping into formatting, it is critical to identify the most important metrics to report on your dashboard. Not everyone cares about the same measures. Look through your identified impact and progress metrics to select the results that will matter to the most people. Often this includes key impact metrics and progress toward current milestones. As you move through implementation, you can always change which progress metrics get reported. Use rewards to provide feedback. A reward can be as simple as telling people they did a great job. You can also incorporate badges for significant achievements.
- **Accurate:** Obviously, you want the data on the dashboard to be accurate. However, it is critical that people reviewing the dashboard understand that it is accurate. A good way to promote this understanding is to share some information about the data (e.g., data source, when it is pulled for reporting) and how it is used (e.g., calculations, data owner).
- **User-friendly:** Useful dashboards are set up in a way that makes the results easy for someone to understand. This means that results are in charts and graphs rather than data tables. Highlight changes in performance with colors and graphics, such as arrows.

COLLIBRA HELPS MEASURE PROGRESS

Collibra supports measurement efforts by making some adoption metrics readily available. Each module, or area in your Collibra environment, has its own metrics including active users, asset count, changed task count, domain count, licenses available, license usage, page hits, and task count. By default, the counts on the Metrics page are shown in daily increments over a one-month period, but you can edit the time range as needed.



Best Practice 7

Plan for and manage resistance

The good news is you can plan for and manage resistance. The bad news is that resistance is going to happen. It is a natural, normal reaction to change. You need to overcome this resistance in order to drive adoption. Because the truth is that if you don't hear about resistance, it's not because it isn't happening, it's because you aren't listening. Further, people's resistance to new technology adoption will derail your implementation faster than any other force.

The goal with managing resistance is to help people find a new "normal" way of doing things as quickly as possible

Resistance happens because people get comfortable with their tools and processes. Introducing new technology, no matter how beneficial, is a disruption to the "normal" way of doing things. The goal of managing resistance is to help people find a new "normal" way of doing things as quickly as possible. To do this and drive adoption, you need to understand why people resist the change and then provide the resources they need to overcome that resistance.

The key to managing resistance is to understand the reasons why someone is resisting the change in the first place. This sounds deceptively simple. There is a myriad of reasons why people resist change. Often these reasons fall into at least one of three categories: **Logical, Affective, or Tactical**.

Logical reasons for resistance have to do with a lack of understanding about the reason for the change. Resistance also could also have an affective component, which includes emotions and attitudes toward change in general or the specific change you are trying to make. Tactical reasons for resistance include a lack of understanding about how to make the change. All three of these categories of resistance are important and impactful, so it is critical to listen for and address each one.

Reasons for Resistance

Logical	Affective	Tactical
Value Case	Doubtful of promised outcomes	How technology fits into their established workflow
How the technology will increase productivity (i.e., make work easier)	Negative perceptions of intended outcomes	How to use the technology
High cost / low reward	Bad experiences adopting change in the past	Unclear expectations

You can preemptively plan for each type of resistance and implement strategies to address issues before they come up.

Preemptive Strategies to Address Resistance



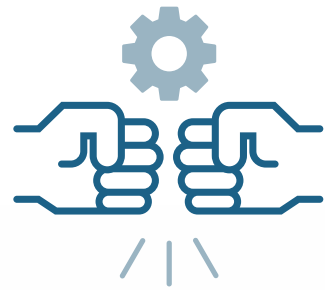
Throughout the course of the implementation, you will have some resistance and managing that resistance requires time, energy, and resources. Unfortunately, these are often in short supply during a technology implementation. So, you need to find a way to get people the right resources at the right time with the least amount of energy.

Knowing that resistance will happen allows you to plan for it. Resistance often manifests as a “problem” with the technology. Essentially people say things like “I can’t use Collibra because...” Surprisingly, you can drive adoption when you change problems into solutions that fit users’ needs. People who come to you with a problem can become your biggest supporters if you handle those problems in the right way.

There are three steps to addressing any problem: Identify, Address and Follow Through.

1

Identify. The first step is to identify the issues people are having and ask questions to make sure you understand the full scope of each issue. We recommend using a variety of listening approaches to collect feedback from as many sources as possible. Some ways to listen include Data Steward meetings, crowdsourcing comments within Collibra, emails to the Data Governance office, and Data Governance Town Hall meetings. This is where your Change Team can help.



2

Address. The second step is to address the issues you hear about. Many organizations already have issue-management processes in place. Prior to the Collibra implementation, review your processes to ensure that they are sufficient to manage the issues you anticipate during the implementation. If you do not have an issue-management process in place, it is critical that you build one prior to the implementation.

The critical components of issue management can be summed up by the acronym **CARE**:

C: Clarify issues and reasons for resistance.

A: Ask questions about gains and losses.

R: Resolve issues if possible.

E: Escalate if needed.

3

Follow Through. The third, and most critical step, is to follow through. It is not enough to find a solution, make a change, etc. You need to communicate that the issue was addressed so people realize that you are putting in the effort to listen for their feedback, you care about the issues they bring forward, and you want to help them. At the end of the day, adoption happens when you overcome resistance. The sooner you find out why people are resisting a change, the sooner you can address the issue and they can adopt the change. Showing people that you are listening and taking action builds trust in your team. This will encourage people to come forward with issues so you can support their adoption of Collibra.



Best Practice 8

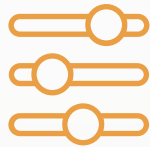
Integrate (Meta)governance

Metagovernance refers to everything you need to do to maintain and improve your Collibra environment and its contents over time. This includes guidelines, policies, processes, standards, tools, etc. Essentially everything that is in place to ensure that Collibra continues to provide value over time with up to date, reliable, and safe information.

Metagovernance starts with a big picture or framework that outlines the roles and responsibilities for who is going to make decisions about the Collibra platform and who is going to implement them. Then you establish a set of processes to ensure that those decisions are made in an accurate, clear, consistent, and even ethical manner. Next, you build processes or procedures to implement decisions. Finally, you build ways to monitor the impact of the decision and its implementation.

Here are some examples of what may be involved in metagovernance:

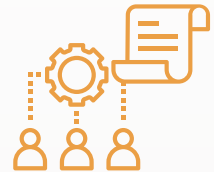
Metagovernance includes guidelines, policies, processes, standards, tools, etc.



Guidelines for configuration and setup



Identification of roles and responsibilities



Guidelines for maintaining roles and responsibilities



Procedures and guidelines for decision-making and approval



Processes for implementing decisions



Guidelines for things like naming conventions, categories, classifications, etc.



Procedures and guidelines for managing permissions



Guidelines for how to integrate automated decision-making in Collibra with outside, manual decision-making approaches



Using metagovernance helps to ensure that any decisions about what happens in Collibra are thoroughly evaluated by the right people at the right time. Without metagovernance, you may get cycles of groups configuring parts of Collibra with little to no guidance. You may also have limited visibility to who is doing what within Collibra. With metagovernance, everyone knows their roles and responsibilities rather than people trying to do everything themselves or interfering with the work of others.

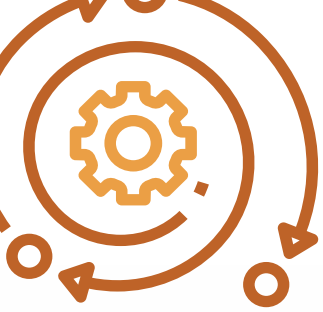
The true benefit of metagovernance is optimizing your investment. With metagovernance, you will use Collibra more efficiently. It will be easier for everyone in the organization to interact with the data and the related standards. It will also drastically reduce the risks of errors that can be made inside Collibra. Once a mistake is made and rolled out to the enterprise, it is very difficult to undo it. Metagovernance helps reduce the risk of costly mistakes while supporting transparency, data integrity, and the ability of people to use Collibra effectively.

Metagovernance helps reduce the risk of costly mistakes

One of the more common metagovernance mistakes we see is changing roles or responsibilities without communicating the change. In Collibra, individuals are assigned roles and each role has a set of assigned responsibilities that enable the individual to do certain things. Metagovernance provides guidelines about how to change roles and responsibilities to ensure that the change meets certain criteria and that it is communicated appropriately. Without this, individuals will gain or lose functionality without understanding why. This leads to mistrust with Collibra, lost efficiency, and decreased adoption rates.

One of the most costly metagovernance mistakes we see is allowing for changes to communities and domains without metagovernance to guide those changes. The community and domain structure, or configuration, organizes all metadata within Collibra. When people are allowed to make changes to this structure without guidelines on how or when to do so, the organization can become fragmented. This can lead to conflicting metadata, people not being able to find the information they need, and loss of trust in and/or usability of Collibra.

This is such a costly mistake because disorganization and fragmentation may need to be addressed by unloading and reloading all metadata in Collibra, which is a resource intensive process.



Best Practice 9

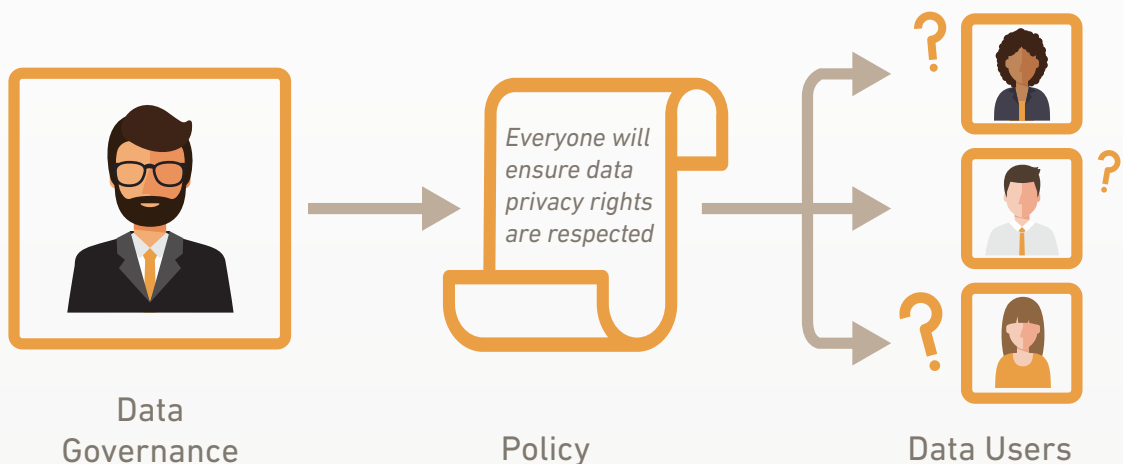
Blend agile and traditional approaches to data governance

To drive adoption, the approach to data governance needs to fit the needs of people throughout the organization. People more easily adopt processes and practices that they understand, are easy to follow, and positively impact their work.

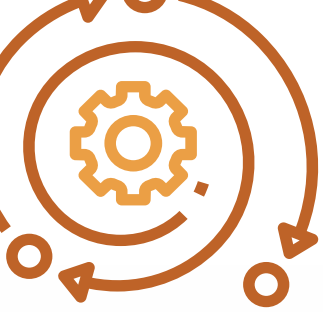
People more easily adopt processes and practices that they understand

Data governance grew in reaction to quickly evolving regulations around data, technology, and privacy. Often, traditional data governance practices are defensive and driven top down with an emphasis on risk mitigation. With this approach, a centralized Data Governance Office takes leadership from executives, develops policies and processes, and then promulgates them to the organization. Because the office is centralized and takes input only from executives, the policies and processes tend to be designed with limited understanding or consideration for the needs of people who work directly with data.

Centralized Data Governance

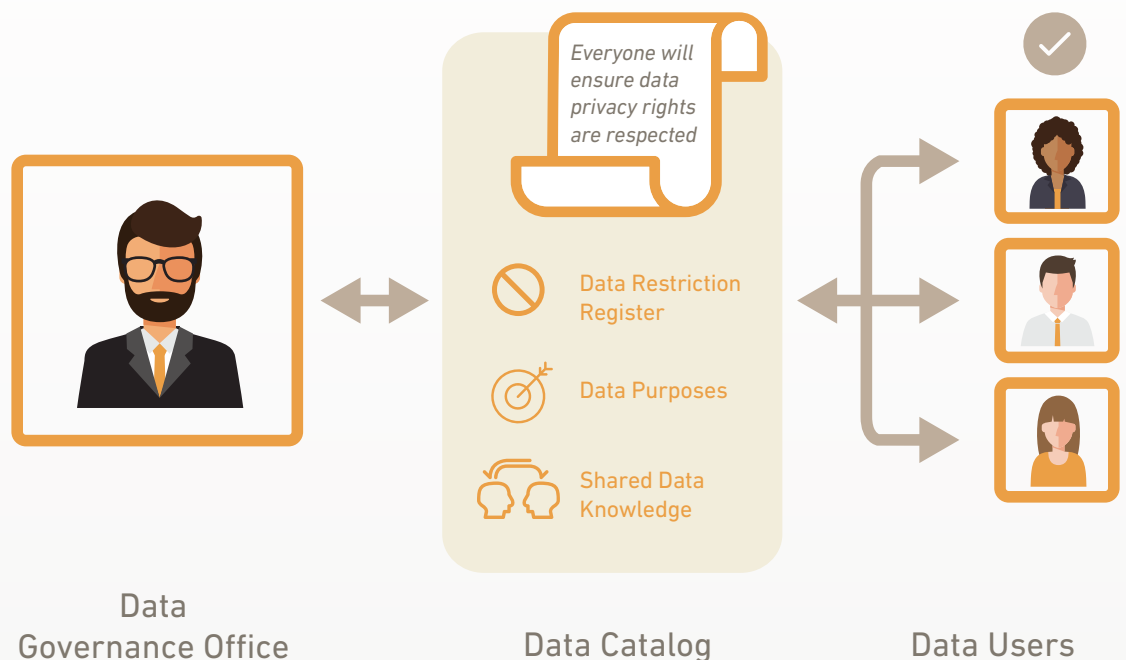


Today, regulations are still evolving quickly, but organizations with successful data governance programs use more agile approaches to drive program decisions. With more experience in data regulations and improvements in technologies, agile data governance programs are democratizing governance by pushing decision making closer to frontline data users. The emphasis is on providing support and guidelines, rather than rigid, prescriptive policies. Staff is more empowered to make data-related decisions based on having more information at the point of usage, to provide insight into needed rules, processes and guidelines and to contribute to metadata and data-related content to improve data trust and understanding.



Using a data catalog, like Collibra, enables this type of two-way communication. The Data Governance Office can use the data catalog to provide support to data users. The data catalog provides a venue to explain required policies, provide guidelines, ensure the right people are given the right access to the data they need when they need it, and build a collection of knowledge to support appropriate data usage. Data users can use the data catalog to access guidelines and information about the data they use, as well as to contribute to that knowledge. The focus of a more agile approach is developing solutions for data needs and supporting data users. The Data Governance Office still makes policies, but they also provide communication and training on how to deal with data needs and appropriate access to enhance metadata.

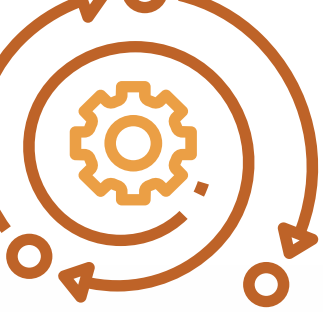
Agile Data Governance



The key is to create a balance between the two approaches

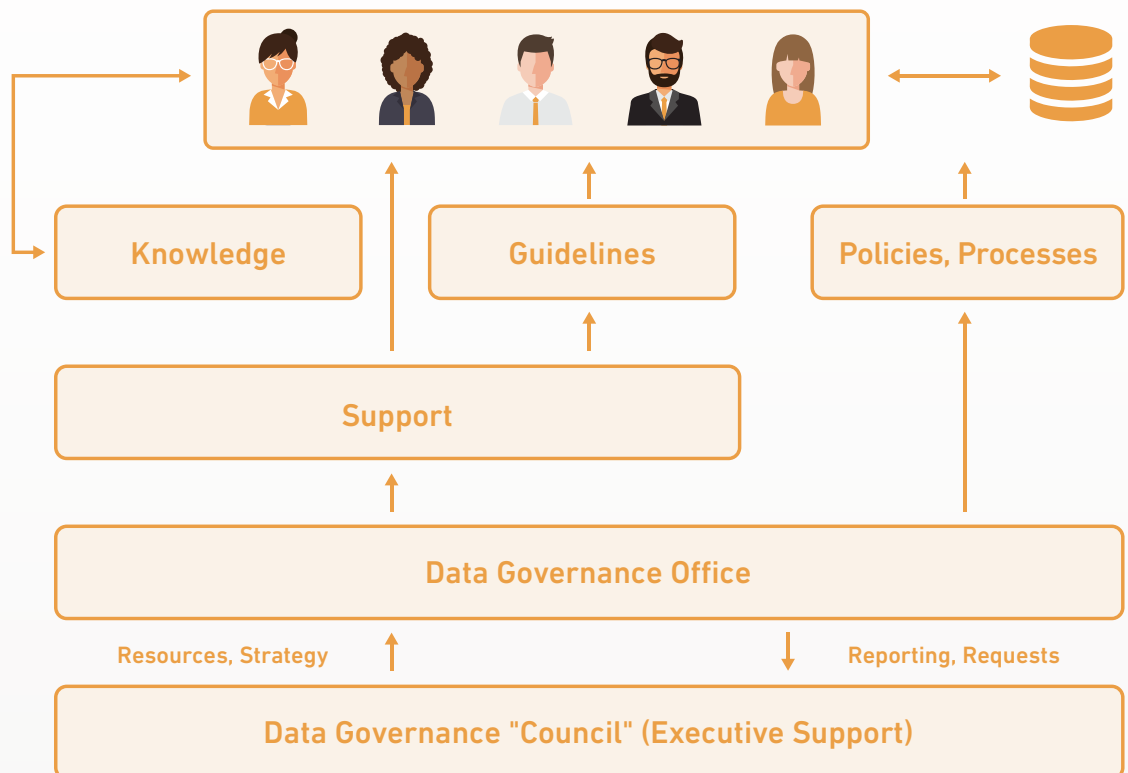
Most organizations are not, nor should they be, completely traditional or completely agile in their approach to data governance. The key is to create a balance between the two approaches and select the best things from each that fit in your organization. Some best practices in combining these two approaches include:

- Rules must still be established to address important concerns and regulations around data (e.g., data privacy and permitted use of data).
- The development of policies and processes should be done as close to the end user and point of use as possible. This development is a collaborative process



between end users and the Data Governance Office(s) and other stakeholders as needed, such as Legal.

- Executives still need to provide resources, communicate overall strategy and support enforcement. However, they do not necessarily need to lead policy guidance.
- The Data Governance Office role is expanded to a true service organization within the organization.
- Technology is essential to support this collaboration.

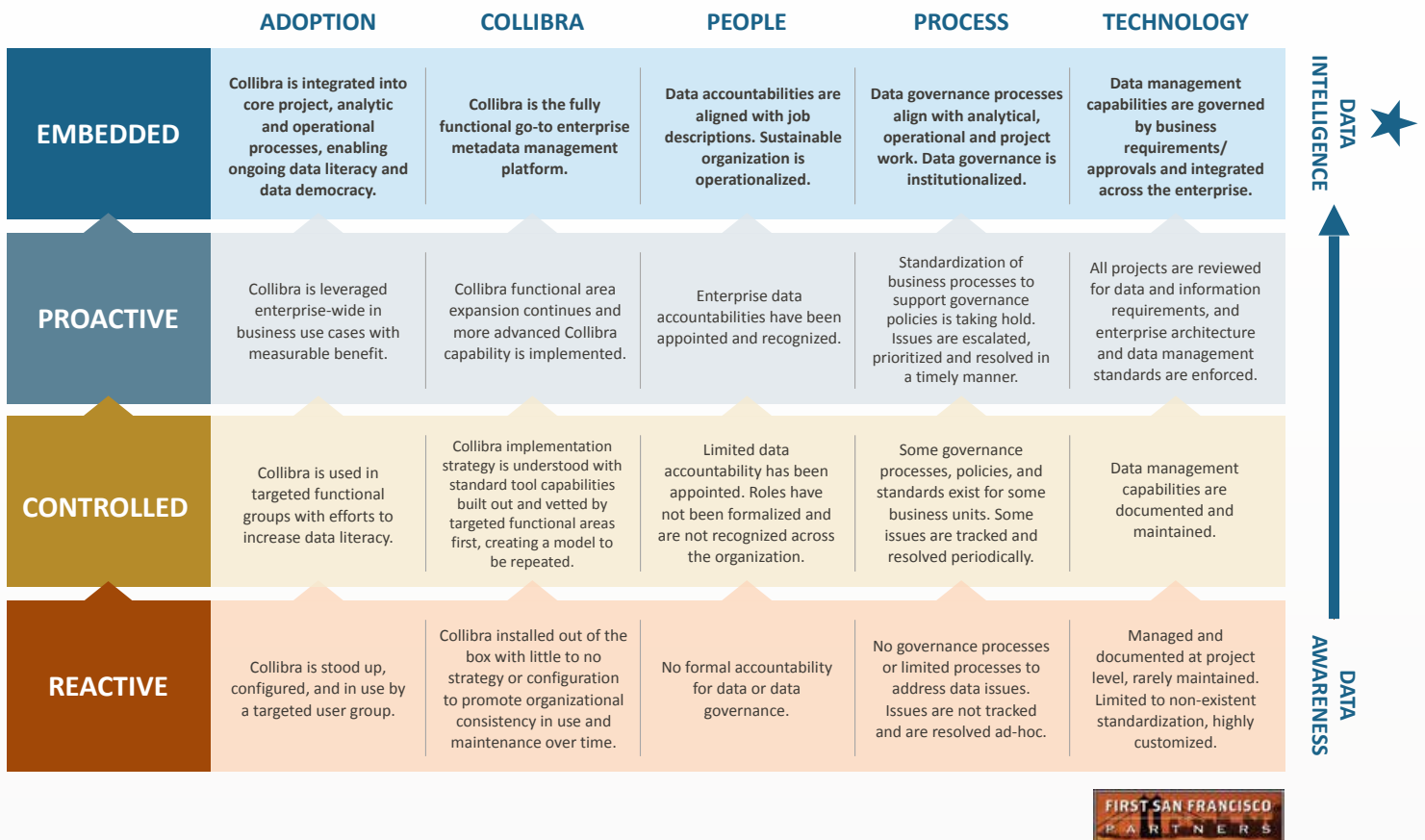


Conclusion

At the end of the day, people only have so much capacity to make a change. Major technology initiatives, like implementing Collibra, don't happen in a vacuum. It affects real people in real time in the real world, which is both professional and personal. Change management exists to assess and address the human factors that will impact your Collibra implementation and drive adoption.

It is only through the adoption of a new technology that you will realize its benefits. Using change management will help you to get the most out of your investment in Collibra, while also helping to keep people within the organization engaged and motivated to continuously improve how they work.

How First San Francisco Partners Can Help Drive Optimized Value of Collibra



FSFP is a leading business advisory and information management consultancy dedicated to helping companies leverage their data to improve strategic decision-making, reduce risk, create operational efficiencies and fuel unprecedented business success. We have extensive experience in data governance-focused organizational change management (OCM) and we have been a **premier Collibra Partner** since 2012. We tailor our change management approach specifically to the requirements and issues related to data governance implementations.

We work with clients to determine how we can best support change efforts related to these implementations – everything from partnering with existing OCM professionals at client sites to providing comprehensive OCM planning and solutions. To derive value out of Collibra, we believe in an end-to-end iterative approach that combines data governance and metadata strategy with rationalized implementation and configuration.



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Becky Lyons, PhD, specializes in helping people and organizations understand and improve their performance. Becky is a consultant at First San Francisco Partners and is an experienced leader and author that has learned the impact change can have on team dynamics as well as individual, team, and organizational performance. With experience as a data governance consultant, healthcare executive and Organizational Development leader, she has helped leaders at all levels of organization to develop the knowledge skills and attitudes needed to face whatever changes come their way.

She has also published a variety of academic and trade publications focusing on the human factors that affect organizational performance. Becky also speaks at conferences and facilitates workshops to share best practices.