

Erwin DI Suite Data Governance Maturity Assessment Basic

Overview

The **Data Governance Maturity Assessment Basic** is a packaged service to assess an organization's current Data Governance state and provide a clear path to their next steps over the course of a maximum of 160 hours, empowering businesses by pinpointing areas for improvement, highlighting key focus points and providing practical roadmap leading to trusted, high-quality data. Quest leverages its strong mix of technical expertise, cross-sector understanding and best practice methodologies to provide recommendations based on business needs and desired outcomes, including:

- Identifying use cases and the associated business cases.
- Defining the implementation roadmap.
- Providing the pathway for Data Governance improvement.

This allows customers to:

- Increase Data Governance visibility and understanding.
- Identify gaps and enable effective planning.
- Enable planning for regulatory compliance or AI readiness.



Outcomes

The **Data Governance Maturity Assessment** will help uncover:

- The current technical data landscape and identify potential issues regarding meeting Data Governance requirements.
- The current people landscape, including models of ownership and stewardship (if applicable) and how this aligns with the data flow/lineage across the organization.

- The strategic direction (including any anticipated organizational change), as well as statutory/legislative requirements that will need to be met
- Key areas of Data Governance and Management across the organization, collating differing views and perspectives to provide a baseline.
- Gap analysis and recommended activities to uplift maturity for quick wins and in alignment with strategic goals.
- A plan of what to do next aligned with upcoming requirements.
- Recommendations include suggested tooling to improve data availability, centralization, protection, literacy and governance in the organization in line with available resources.

Activity Description

A kickoff web conference will be conducted with key customer stakeholders to review materials (including questionnaires) to ensure expectation alignment, to confirm lines of inquiry are appropriate to identify expectations and outcomes for this service, contributors are identified and timescales agreed. A series of interviews/workshops will then be conducted with a mix of Information Technology (IT), Business Intelligence (BI) and business stakeholders, the primary focus of these sessions will be to:

- Interview key Business and IT stakeholders.
- Review current Governance documentation.
- Assess current strengths and areas for improvement within the organization.

An assessment of the information collected is then performed in three phases:

1. Review Current Data Maturity

- Perform a Data Governance assessment based on a robust scoring framework.
- Identify needs and gaps from the assessment results.
- Identify key themes from the current state assessment.

2. Gap Analysis and Prioritization

- Perform a Data Governance assessment based on a robust scoring framework.
- Identify needs and gaps from the assessment results.
- Identify key themes from the current state assessment.

3. Roadmap and Recommendations

- Define agreed Initiatives, their duration, effort, prerequisites, dependencies, and organizational involvement.
- Develop roadmap timeline and sequencing.

A final summary report is then drafted, with several iterations shared if necessary and updated based on feedback provided before publishing, followed by a web conference session with your appropriate team members to review key findings.

Limitations, Prerequisites and Assumptions

Limitations

- Scope is limited to one (1) Data Governance Scope item only, defined as either Data Governance Strategy & Business Use Case; Data Governance; Data Quality; Metadata Management; Data Modelling; Reference Master Data; Data Architecture or Technology Landscape.
- Scope is limited to one (1) Business Unit only, defined as a part of an organization that operates as a distinct and defined part or group within the organization.
- The scope is limited to a maximum of four (4) stakeholder interviews.
- Maximum delivery effort of one hundred and sixty (160) hours.

Assumptions:

- All Services will be delivered remotely.
- Quest uses Microsoft Teams for web / teleconferencing; however, an equivalent Customer solution can be used by mutual consent.
- This Service offering expires twelve (12) months from the date of purchase.
- No Service shall be performed during local, state, or federal holidays unless expressly agreed upon in writing and coordinated by Customer and Quest.
- The Service will be delivered in the English language, unless expressly agreed upon in writing and coordinated by Customer and Quest.
- Service will be delivery over consecutive full business days, unless expressly agreed upon in writing.
- Quest will assign a primary consultant and may choose to assign multiple subject matter experts as needed either simultaneously or separately.
- The project team shall be assigned following Quest's receipt of the SO executed by Customer and Customer's PO (if required). The Services shall start upon mutual agreement of the parties. The typical lead time for scheduling the start of an Engagement is four to six weeks.

Customer will:

- Provide a project manager / named responsible person to oversee Customer related activities.
- Ensure relevant IT, BI and business stakeholders are identified, available to participate in defined phases and briefed.
- Provide access to relevant systems for the duration of the assessment is necessary.
- Work in partnership with Quest on this assessment, which is essential for the successful delivery of this service, including supporting the arrangement of semi-structured interviews, conducting internal interviews where appropriate and identifying stakeholders who could and should contribute to this process.
- Provide any existing architecture, processes, and systems information prior to the initial kickoff session (including rough data volumes or report numbers) to ensure that Quest can be as targeted as possible within the interview process. Quest can provide a list of typical artefacts that may be helpful in this goal.

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Appendix A: Sample Recommendations, Prioritization and Action Plan



Issue -> DG Roadmap - action step

- A1 No transversal Data community -> DG Community
- A2 How to fund continual improvement initiatives -> DG Community (Funding)
- B1 No data dictionary -> Comprehensive Data Asset Management
- B2 Missing dashboards and shared reporting layer -> Role based Dashboards, Report Catalog
- B3 Missing monitoring of operational data processing -> Monitoring of Data Quality (SLA information and Dashboards)
- B4 Information transparency -> Metadata Dictionaries and Lineage Management
- B5 Limited communication on new developments -> Transparent change mgmt. process
- B6 Missing Reporting transparency -> Reporting Catalogue, Critical Reports
- C1 Missing strong Enterprise Data Architecture -> Clear Change mgmt. processes and High-level data architecture
- C2 Data Quality (DQ) early warning system missing -> Monitoring of DQ and Extension of DQ Dashboards

