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DATA MANAGEMENT STRATEGY

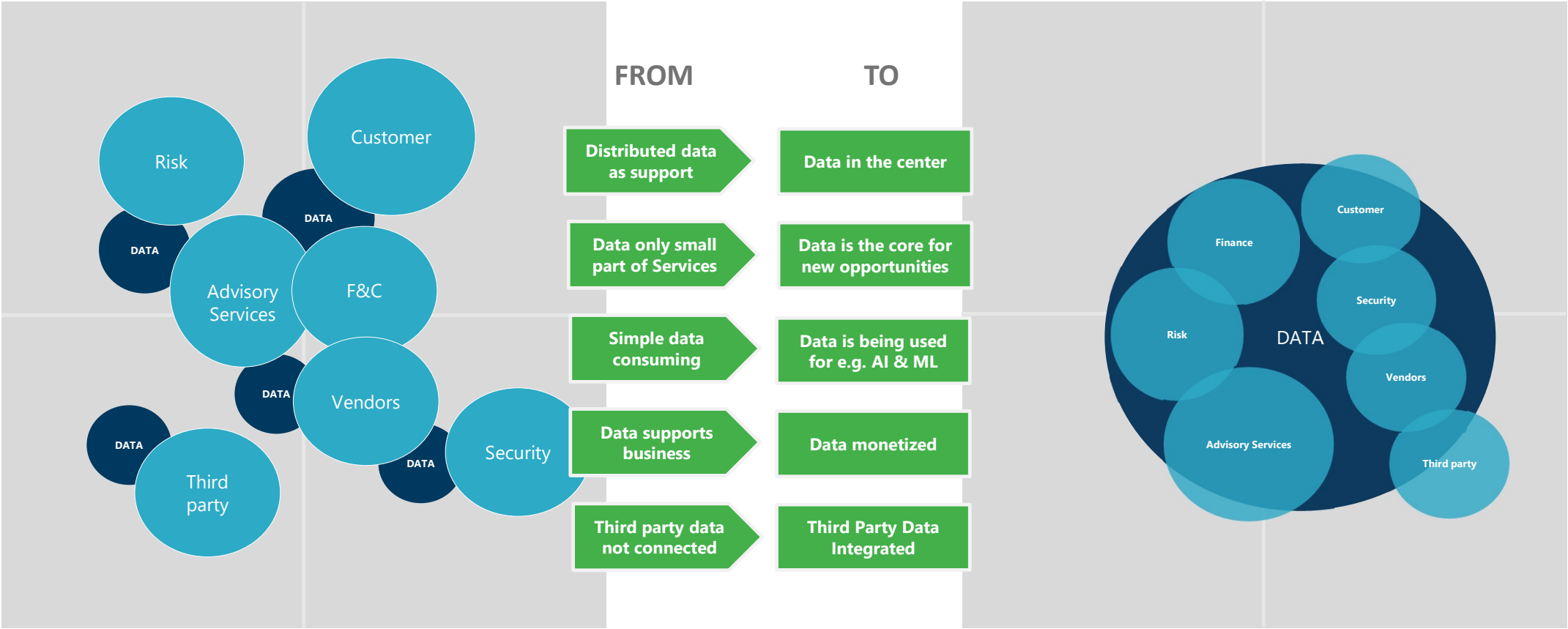# Agenda

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02 Setting the scene

People 2.0 Mission

Mission Produce greater value for clients and partners along with compelling career opportunities

Vision As a trusted partner provide excellent integrated services for clients

Action By using data centricity to transform data into intelligent action, increase innovation and innovative business model to monetize data, People 2.0 will produce greater value for clients and career opportunities for people

Main question: How do we get from..... to......?

	FROM	TO
Risk / Customer / Advisory Services / F&C / Vendors / Security / Third party / DATA	Distributed data as support	Data in the center
	Data only small part of Services	Data is the core for new opportunities
	Simple data consuming	Data is being used for e.g. AI & ML
	Data supports business	Data monetized
	Third party data not connected	Third Party Data Integrated

DATA — Finance, Customer, Risk, Security, Vendors, Advisory Services, Third party

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DATA is a critical enabler for business strategies

- Based on the strategy to become a data-driven company, your business demands taking the necessary decisions/strategies in order to increase value-add to the customer, continuously improve internal performance and develop new business opportunities.

- Many of today's organizations are not yet ready in terms of data maturity, skills, technology and processes.

- The HSO Data approach looks to address these challenges in a structured way:
    - **'Fix the basics'**
    - '**Run the business**'
    - '**Build for the future**'

03 HSO Approach

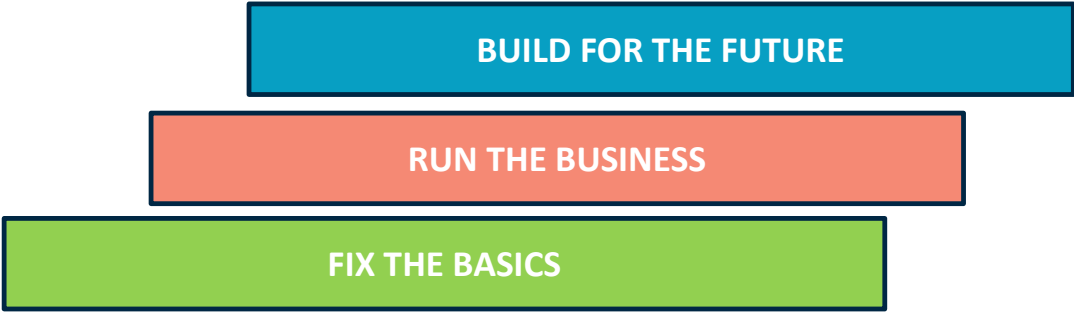# THESE ACTIONS ADDRESS THE CHALLENGES AND SOLVES THEM...

DATA GOVERNANCE

DATA QUALITY

DATA ARCHITECTURE

DATA MODEL

DATA PIPELINE

DATA EXECUTION

BUILD FOR THE FUTURE

RUN THE BUSINESS

FIX THE BASICS

DATA ASSESSMENT

DEVELOPED BUSINESS OPPORTUNITIES FOR ADVANCED DATA INSIGHTS

DESIGNED DATA ARCHITECTURE

DEVELOPED **DATA QUALITY FRAMEWORK** AND **DATA GOVERNANCE**

ASSESSED **DATA MATURITY**, DATA PIPELINE

FINETUNED DATA **VISION AND STRATEGY**

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THESE ACTIONS ADDRESS THE CHALLENGES AND SOLVES THEM...

DATA GOVERNANCE

DATA QUALITY

DATA ARCHITECTURE

DATA MODEL

DATA PIPELINE

BUILD FOR THE FUTURE

ENSURE CONVENIENCE

FIX THE BASICS

DATA EXECUTION

First things first:
6-week data assessment

DEVELOP BUSINESS OPPORTUNITIES FOR ADVANCED DATA INSIGHTS

DESIGN DATA ARCHITECTURE

DEVELOP **DATA QUALITY FRAMEWORK** AND **DATA GOVERNANCE**
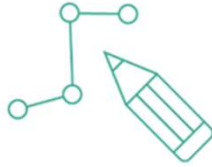
ASSESS **DATA MATURITY**, DATA PIPELINE

FINETUNE DATA **VISION AND STRATEGY**

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THESE ACTIONS ADDRESS THE CHALLENGES AND SOLVES THEM...

DATA GOVERNANCE

DATA QUALITY

DATA ARCHITECTURE

DATA MODEL

DATA PIPELINE

STEP II:
implementing the
data strategy

BUILD FOR THE FUTURE

RUN THE BUSINESS

FIX THE BASICS

6-week data assessment

DEVELOPED BUSINESS OPPORTUNITIES FOR ADVANCED DATA INSIGHTS

DESIGN DATA ARCHITECTURE

DEVELOPED **DATA QUALITY FRAMEWORK** AND **DATA GOVERNANCE**

ASSESSED **DATA MATURITY**, DATA PIPELINE

FINETUNE DATA **VISION AND STRATEGY**

04 6-week data assessment

6-WEEK DATA ASSESSMENT

1
FINETUNE
DATA VISION
AND STRATEGY
FOR KROLL

2
ASSESS
DATA
MATURITY,
DATA PIPELINE

3
HIGH LEVEL
DESIGN OF
DATA QUALITY
FRAMEWORK
AND DATA
GOVERNANCE

4
SET-UP DATA
ARCHITECTURE

5
IDENTIFY
USE CASES FOR
ADVANCED
DATA INSIGHTS

6
DATA **PLAN**
- Fix the basics'
- 'Run the business'
- 'Build for the future'

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6-WEEK ASSESSMENT ACTIVITIES

WEEK 1: FINETUNE DATA VISION AND STRATEGY

This step is to further align the data ambitions of People 2.0 and define the goals, scope and deliverables in the timeframe of 6 weeks.

WEEK 2: ASSESS DATA MATURITY, DATA PIPELINE

In this week we want to assess the current data maturity level and the ambition level of People 2.0 regarding data maturity. HSO uses its **DATA MATURITY MODEL** for this assessment. This will be done via interviews and workshop to further understand current data measurements that People 2.0 has in place.

WEEK 3: HIGH LEVEL DESIGN OF DATA QUALITY FRAMEWORK AND DATA GOVERNANCE

With the objectives, abilities and limitations in check we should be able to create a high-level design of the quality and data governance framework. HSO uses its **DATA INFORMATION MANAGEMENT FRAMEWORK** fort this.

WEEK 4: SET-UP DATA ARCHITECTURE

In week 4 we will start with designing the data architecture following the **MODERN DATA ESTATE PRINCIPLES**. During this week we will have a deep-dive in architectural set-up and different architectural principles will be addressed and discussed (from Datalake & Data Warehouse vs Data Lakehouse, from Kimball vs Data Vault).

WEEK 5: IDENTIFY USE CASES FOR ADVANCED DATA INSIGHTS

After having the governance, data management and data architectural principles and high-over designs in place we will have a deep-dive in **defining use cases** that will increase the value of data and AI from the start (we call these the spotlight initiatives). The spotlight initiatives help the business to 'see' the value of data and monetizing data.

WEEK 6: PRESENT DATA PLAN

All the previous steps come together by finalizing the end-to-end plan based on our principles; 'Fix the basics', 'Run the business', 'Build for the future' including a roadmap and roles and responsibilities.

6-WEEK ASSESSMENT ACTIVITIES

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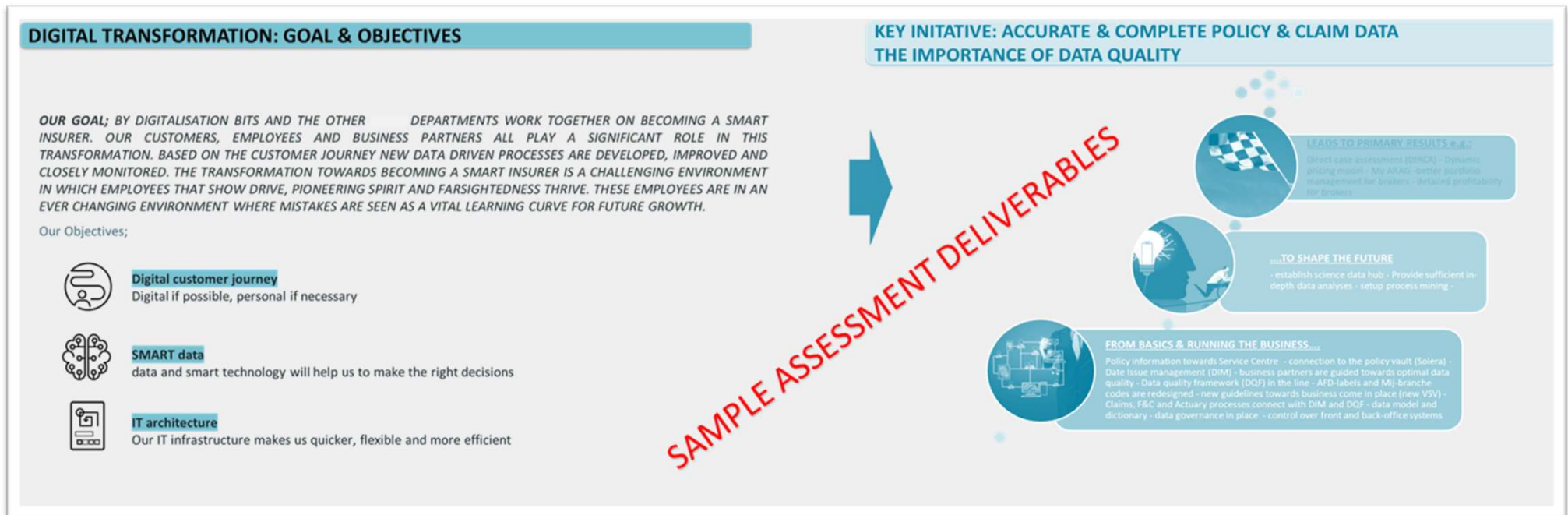
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Current status
Ambition level

Summary Characteristics →	*Inside, now, reactive* No internal integration **Basic**	*Inside, now, reactive* Partly internal integration **Developing**	*Inside, now, reactive* Internal integration **Challenging**	*Inside, now, proactive* Integration across departments **Advanced**	*Outside, future, proactive* Strategic integration **Leading**
Work Streams ↓ **Strategic Direction**	• Reports and KPI's not aligned to organization's objectives • Impact of change across related departments not evaluated, described or understood	• Minimal interconnected activity • Desire to create a strategic plan exists, but no action taken	• Understanding on how to implement Data & Analytics plan • Inability to sufficiently evaluate plan's objectives	• Strategy's purpose communicated effectively • Related business units share common KPI's and reports	• Practices fully integrated, appropriately reviewed and followed by users • All changes cascade into affected areas and Iterative framework designed to handle exceptions
Process	• Multiple reports unique to each business unit • Timeframes do not coincide • Processes interrupted, easily broken and time consuming	• Consistent timeframes emerging amongst business units • Processes remain unique to each business unit but focused around regional/related units	• Standardized major processes such as KPI's and reporting • Inflexible and disconnected sub-processes	• Developing relationships within processes • Core strategy directly influences processes • Difficult to adapt to changes in demand	• Well defined, documented, and followed process • Understood by all users • Approvals follow organizations hierarchy and omit unnecessary reviews.
People & Organization Change	• Users lack training and feel isolated from organization's goals • Data and reports lack voice and are often not supported by decision makers	• Operational reports don't reflect organization's KPI's and ambitions • Strategy and organizational benefits are displaced by individual agendas	• Users familiar with reports and KPI's of related BU's • Departments struggle to implement strategy within individual reports	• Users understand organization plan and work towards BU reports and KPI's • Technology and benefits of process not adequately described	• Users clearly understand and accept BI tools and data discovery • Individual development plans tied to company KPI's
Technology	• Inefficient internally developed and maintained spreadsheets • Requires hours of rework to make changes and integration	• Standard templates, but highly manual and inflexible • Extensive rework and complex to get insight in information • Business case to upgrade identified but little support exists	• Reporting systems with limited system integration and support • Implementation aged or never met company needs	• Business' goals and key drivers are linked within BI tools • Technology manages timeline and approvals in an ordered fashion • Information is accessible and meaningful	• Fully integrated/automated system supporting multiple users • Supports automated workflows/process control • Integrates into organization's current IT infrastructure

SAMPLE ASSESSMENT DELIVERABLES

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6-WEEK ASSESSMENT ACTIVITIES

WEEK 3: HIGH LEVEL DESIGN OF DATA QUALITY FRAMEWORK AND DATA GOVERNANCE

With the objectives, abilities and limitations in check we should be able to create a high-level design of the quality and data governance framework. HSO uses its **DATA INFORMATION MANAGEMENT FRAMEWORK** for this.

	Ad hoc — Increasing maturity → Formal, Aligned — Enterprise-wide, Proactive — Continuous, Validated — Best of breed				
HSO DIMF Components	**Level 1**	**Level 2**	**Level 3**	**Level 4**	**Level 5**
Data Governance	No data governance within the organization. Processes are ad-hoc, unpredictable, poorly controlled, and reactive. Lack of ownership of the data may lead to or sustain data quality issues.	Some standard policies and processes exist, but are applied on an ad-hoc basis. Data governance is unlikely to appear within the agenda of any large change initiative.	Preventative data governance exists and these are used to establish consistency in the organization's data repositories, driven primarily by a specific business unit, initiative, or program.	Data governance framework exists and is actively applied to key data repositories. Data Governance has an active role in data management, data quality, and key architecture projects.	Quantitative enterprise-wide data standards are firmly established, applied to the data stores, and measured against best practice. Standards are reviewed and updated to reflect changing business objectives.
Data Quality	No data quality exist within data architecture. Data is regularly transformed, combined, and reused with minimal testing	Minimal data quality checks performed upon extraction from source systems to the data warehouse. Data checks are limited to technical validations with no input from the business.	Data quality standards and policy exist but may not be actively applied across all data stores. Tools are in place to verify data quality, cleanse and enrich during import to the data repositories (warehouse, marts etc.).	Business is engaged in setting policy and standards for data quality. High level of consistency across systems. Validation and analysis performed on data available in the repositories	Data quality is actively managed in the data stores, with erroneous records identified through automated controls and user feedback. Changes flow back to source systems.
Data Usage	Management Reporting is conducted from multiple source systems with heavy dependency on EUCs. Reports are static and point-in-time. Management and users have little to no trust in the data.	Spreadsheets and analytic tools support a single application area or business process from bespoke data marts, resulting in a lack of an enterprise-wide single source of truth.	Interactive Reporting and analysis are available across functional boundaries via the data repositories. End user tools exist for direct access, but limited.	Data is freely available for analysis and organized around KPIs. Data architecture supports analysis beyond static reporting and is used by various business functions.	Real-time interactive reporting and dashboards from the data stores provide the business with a comprehensive view of the organization to support strategic business decisions and operations. Application of BI search technologies.
Data Management	Point to point solutions for data flow. Wide use of excel spreadsheets and Microsoft access databases. No data management standards exist. Metadata is not centrally managed or maintained.	Multiple data marts. Metadata management exists within some BUs, but is extremely limited scope and usage. Data movement tools and standards are inconsistent between business units. Data protection and retention is limited to legal requirements	Integrated data flow across well established data repositories providing enterprise metadata. Data privacy rules established.	Service components and framework defined for modular implementation of repositories and data movement. Adaptive metadata. Data visibility rules are applied and auditable.	Integrated master data and data repositories. Use of structured and unstructured data. Fully established SOA architecture. Wide use of real time and virtual data warehousing techniques.
Architecture	No enterprise architecture strategy exists for data infrastructure. Data design and architecture is driven by the business units with no common standards	Architecture standards exist but are not enforced. Tactical needs drive the design and use of data stores within the BU's. Data services are limited and manually intensive.	Established data framework based on defined business strategy. Clearly defined technology standards. Documented data models. Data architecture improvements are considered as part of the annual budgeting process	Service Orientated Architecture for data distribution is followed across the enterprise. Established set of reusable design components. An object model for data is used to drive architecture decisions and align new projects to the enterprise strategy.	Integrated architecture processes exists across all architecture domains and are actively maintained. Architecture aligns with enterprise strategy and is scalable and flexible to adapt to changing business needs.

6-WEEK ASSESSMENT ACTIVITIES

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- This information management framework (based on best practices) describes the elements that can be used to increase the maturity level and set up the Data management practice
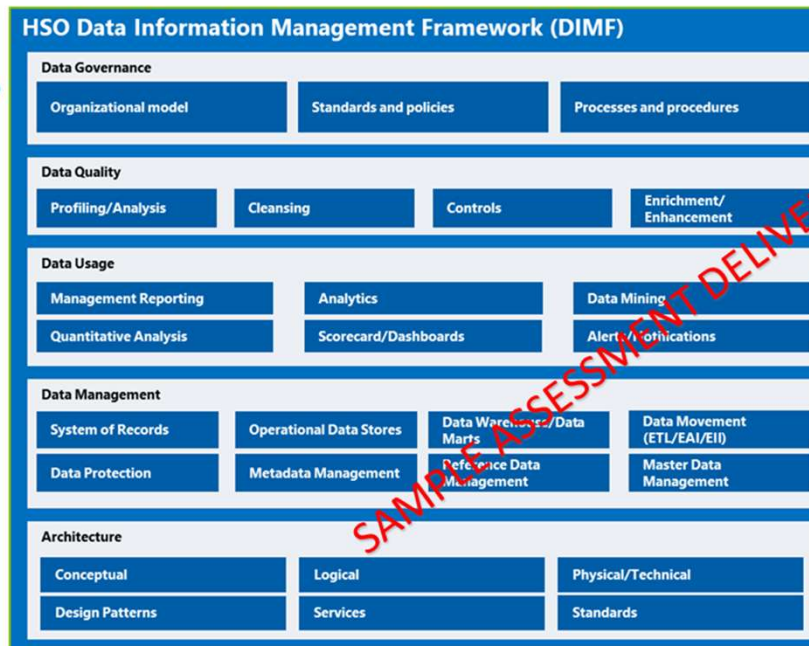
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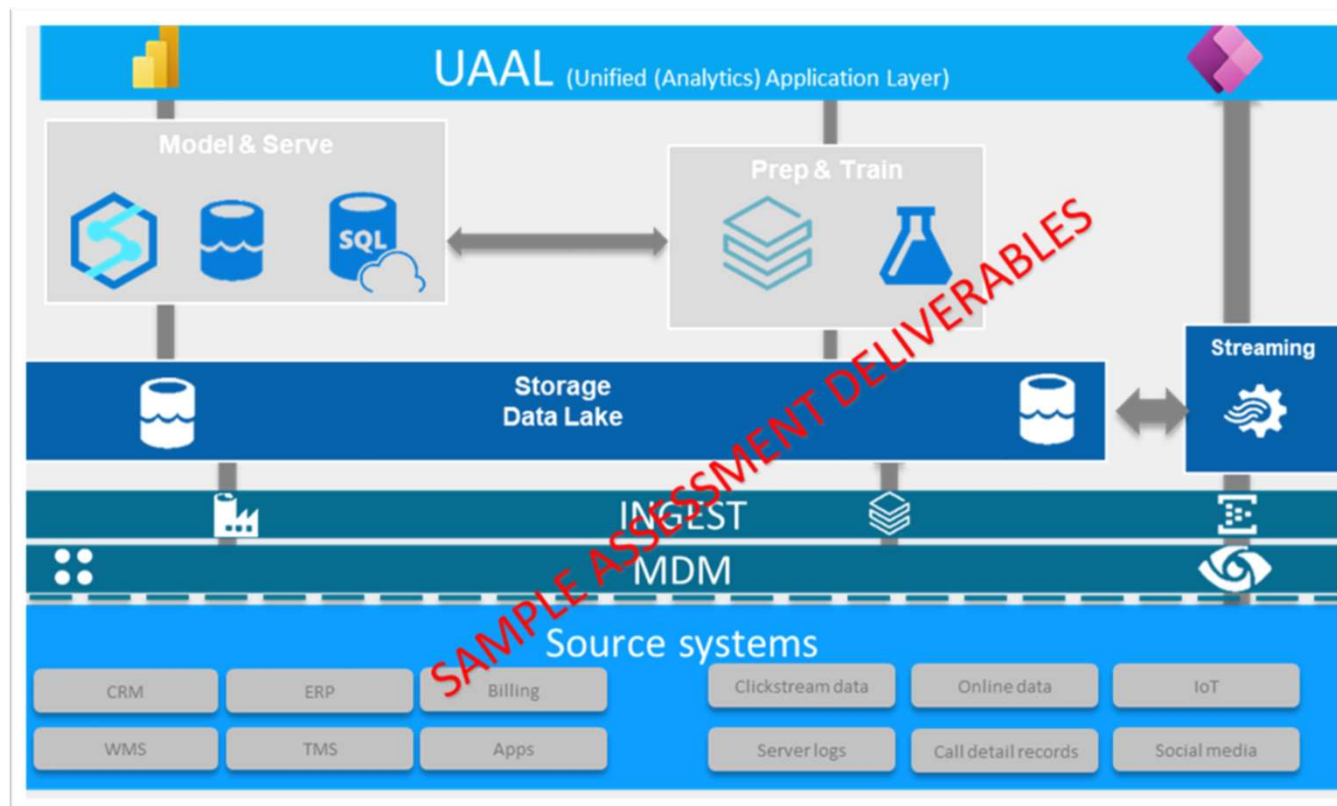
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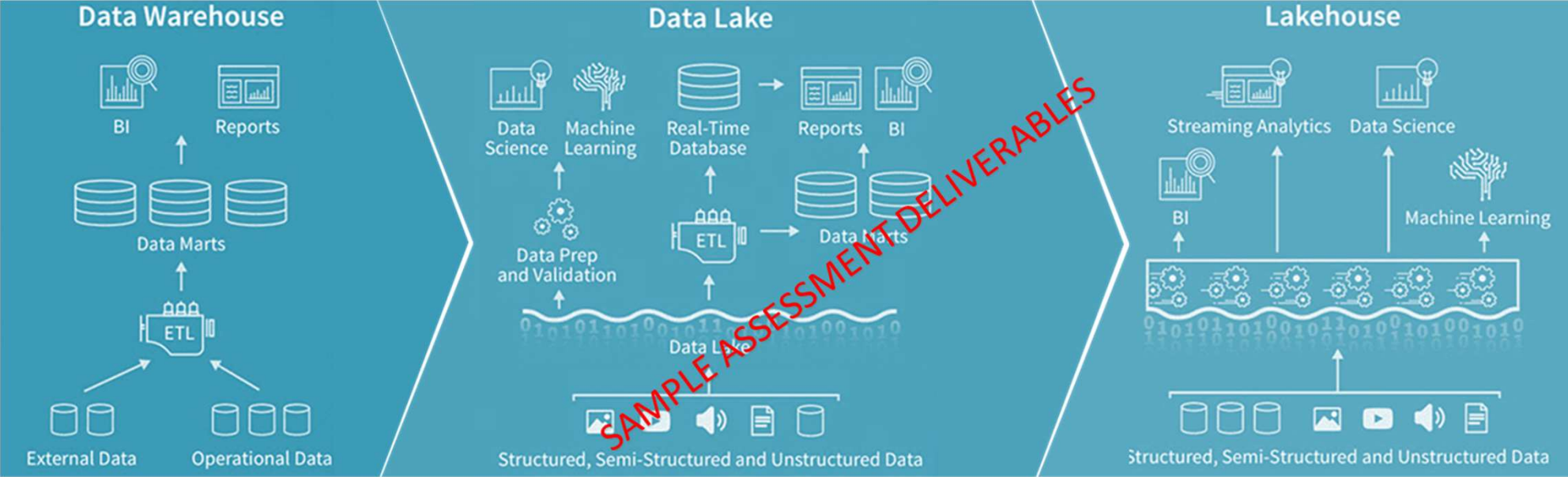
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Expected business value
of spotlight initiatives

Overview business cases
and planning

Added value and impact per
use case

HSO data enabler
quadrant

6-WEEK ASSESSMENT ACTIVITIES

WEEK 6: PRESENT DATA PLAN

All the previous steps come together by finalizing the end-to-end plan based on our principles; 'Fix the basics', 'Run the business', 'Build for the future' including a roadmap and roles and responsibilities.

BASICS	RUNNING THE BUSINESS	FUTURE
IMPLEMENT MODERN DATAPLATFORM (MVP)	DESIGN DATA QUALITY FRAMEWORK	ESTABLISH DATA SCIENCE HUB
FURTHER CONNECT SYSTEMS	DESIGN DATA INTEGRATION ARCHITECTURE	PROVIDE MODERN PRICING MODEL
GET ACCURATE & COMPLETE DATA	AUTOMATE (FINANCIAL) ANALYTICS	SETUP DATA ANALYTICS SERVICE
IMPROVE (FINANCIAL) ANALYTICS	INCREASE DATA FLEXIBILITY	SETUP PROCESS MINING
DESIGN DATA MODEL & DICTONARY		
Task Force approach	Business Implementation/ IT Project Management	Prototyping Exploring Creative Workshop

SAMPLE ASSESSMENT DELIVERABLES

6-WEEK ASSESSMENT ACTIVITIES
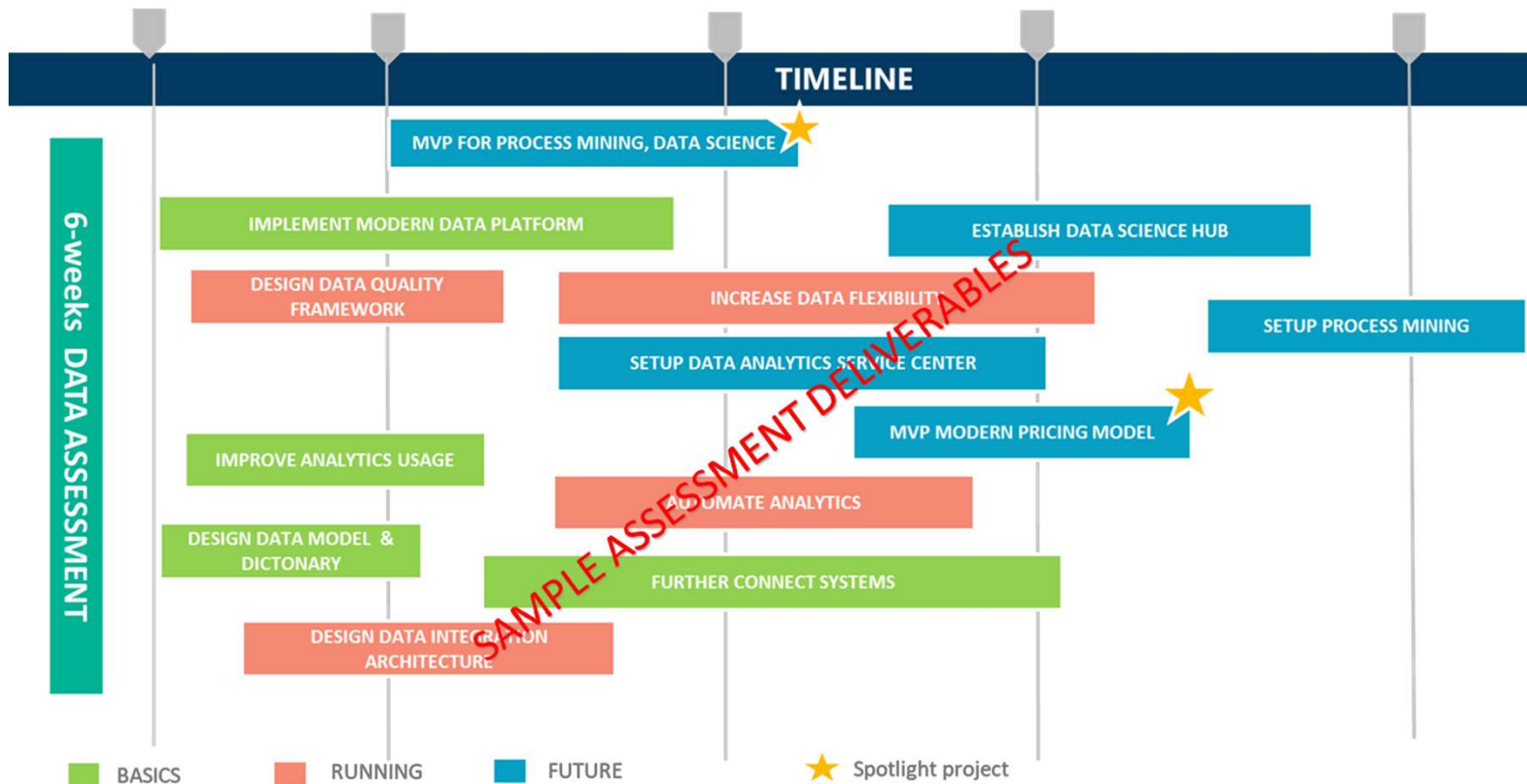
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05　　　Next steps

people2.0
GLOBAL WORKFORCE DEPLOYMENT

Agreeing on HSO's structured approach
HSO believes that by following its three basic principles (fix, ensure and build) People 2.0 will achieve its data ambition

Selecting the right partner
HSO believes that with its structured approach it can help People 2.0 in achieving its data ambition level

Step 01

Step 02

Step 03

Step 04

IMPLEMENT DATA STRATEGY
BY defining the roadmap and clear goals we can collaborate in achieving the ambitions

Start with the 6-week data assessment engagement
This enables HSO and People 2.0 to align on data strategy and collaboration.
(think big start small principle)
Budget 300 hours

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Thank you!

VALUE FOCUSSED

ONE LEAN HSO

**BEST IN CLASS
PLATFORM PARTNER**

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