Data Strategy and Governance

Turn your data strategy into an actionable plan and enforceable policies.

When you put good in, you get good out. At DelCor, we start every data governance project by establishing a rock-solid data strategy that aligns with the organization's business goals. Here are some tips for building a data strategy and turning it into a data governance plan.

You want to make better, data-informed decisions, but where do you start?

If you're like most associations, you're staring at a decade's worth of hoarded data and wondering if your old methods of making assumptions and relying on conventional wisdom are really all that bad. You're probably tempted to jump right in and start deleting or updating data. However, without a plan, how will you know if you're making the right choices for the whole organization?

On the other hand, if you know that you don't have the data that you need, it can be tempting to start with data collection. You'll find that it's very easy to gather data; however, without a plan, it's also very easy to gather the wrong data, silo your data, share data with the wrong people, and ultimately miss out on the opportunity to turn information into action.

Before you can gather the right data and use it effectively to make informed business decisions, you need figure out where you are and where you need to be. Start by evaluating the role that data plays in your organization.

Do you treat your data like an IT issue or an organizational asset?

As your data practices improve from restrictive to innovative, you'll notice a shift in the way you think about your data. When your data is unreliable and difficult to access, it's easy to dismiss it as an IT issue. However, once you are able to use your data to improve efficiency and revenue, you'll see the value of the incredible asset sitting in your database.

Your data maturity is how effectively you use your data to achieve your organizational goals. With a better understanding of your data maturity, you'll be able to make informed decisions about the next steps on your path to an innovative approach to data governance.

Where does your organization fall on this scale?

RESTRICTIVE

- Data quality is considered an IT issue.
- You rely on workarounds to fix data.
- There are no formal policies in place.

FUNCTIONAL

- Data quality is still considered an IT issue.
- Some business units take responsible for their data.
- You have some data standards in place.

EFFECTIVE

- Data quality is considered an organizational asset.
- Business units own their own data.
- You have established, documented, and communicated data standards.

INNOVATIVE

- Data is seen as a valuable organizational asset.
- Data governance metrics are a primary measurement of success.
- Executives support ongoing investments in data governance.

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What goes into a data strategy?

Once you know where you are, you need to decide where you need to go. You know that you want to improve your data governance, but what is the ideal setup for your organization?

Pay attention to your pain points. Are you experiencing data quality issues, labor-intensive manual report generation, ineffective marketing campaigns, or insufficient performance metrics? These are all symptoms of data issues related to master data management, data quality, data security, data storage, system integrations, and compliance. Consider the steps it will take to alleviate those symptoms while developing your strategy.

Your organization-wide data strategy should address all of these areas:

Master Data Management
Where are you storing your core data (e.g., customer information)?

Data Storage
Is your data storage sufficient or do you need to grow into a data warehouse?

Data Quality
Do you review your data for integrity, accuracy, timeliness, and completeness?

System Integrations
How does your data move between your systems, data stores, and applications?

Data Security
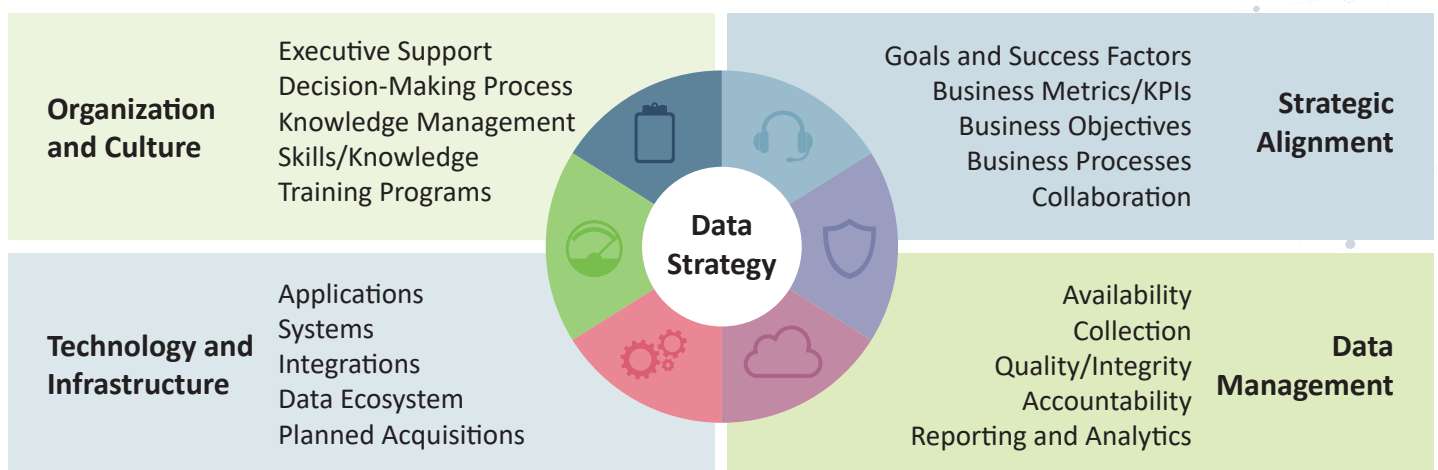How do you enforce standards for classifying, securing, and protecting data?

Compliance
Do you need to comply with GDPR, PCI, CCPA, or other regulatory standards?

Your data strategy should complement and reinforce your organization's strategy.

Your data has the potential to provide substantial value, but only if leadership and staff support your data governance efforts. Consider the following aspects of your organization as you develop your data strategy:

Organization and Culture
Executive Support
Decision-Making Process
Knowledge Management
Skills/Knowledge
Training Programs

Strategic Alignment
Goals and Success Factors
Business Metrics/KPIs
Business Objectives
Business Processes
Collaboration

Technology and Infrastructure
Applications
Systems
Integrations
Data Ecosystem
Planned Acquisitions

Data Management
Availability
Collection
Quality/Integrity
Accountability
Reporting and Analytics

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Data governance will help you execute your data strategy.

Once you finalize your data strategy, those goals and objectives will form the foundation of your data governance framework. The framework should include your data policies, data glossary, guidelines for communicating policy changes, and a list of staff responsible for enforcing and maintaining good data practices.

1 Draft your top 3-5 business questions.

Identify your priorities and goals for data governance to ensure executive buy-in and maximize association-wide support.

Examples:

☐ What segment of membership is consuming X% of a service?

☐ What segment of membership exists where consumption is dropping by X%?

2 Define key business terms in a data glossary.

Develop a data glossary to improve your organization's understanding and use of data by defining key terms.

TERM	DEFINITION	OWNER
Active Member		
Lapsed Member		
Prospective Member		

3 Identify data to track, analyze, and report.

Customer Name
Contact Details
Education
Classification

To avoid confusion and data silos, store all data in one place. This single point of reference will be important as you clean, transform, and share your data.

4 Make sure the right data gets to the right people.

☑ LOCATE
☑ ACCESS
☑ CLEAN
☑ TRANSFORM
☐ SHARE
☐

5 Establish a steering team to enforce good habits.

Create a steering team that will be responsible for maintaining and enforcing data policies.

6 Evaluate, adjust, and repeat.

Empower the steering team to maintain, communicate, and enforce the policies developed during this process. The team should meet regularly to discuss issues, especially as your organization grows.

As your data needs change, your policies should too!

Questions? Contact us.

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