EDM Webinar

Knowledge Models for Data Leaders: Solving the Data Management Puzzle

Part 1 of a two-part webinar series

April 28, 2022

Solidatus   Ortecha   EDM Council

Our Moderator: Colin Gibson - Senior Advisor, EDM Council

- Colin is a senior executive and consultant with 30 years' experience in financial services

- He specializes in architecture, data governance and data management

- Previously head of data architecture for the investment banking divisions of RBS and HSBC and head of enterprise architecture for Willis Towers Watson

- Colin combines an enthusiasm for all things data with experience in software development, technology operations and management of major change programs

The purpose of the Requirements Model
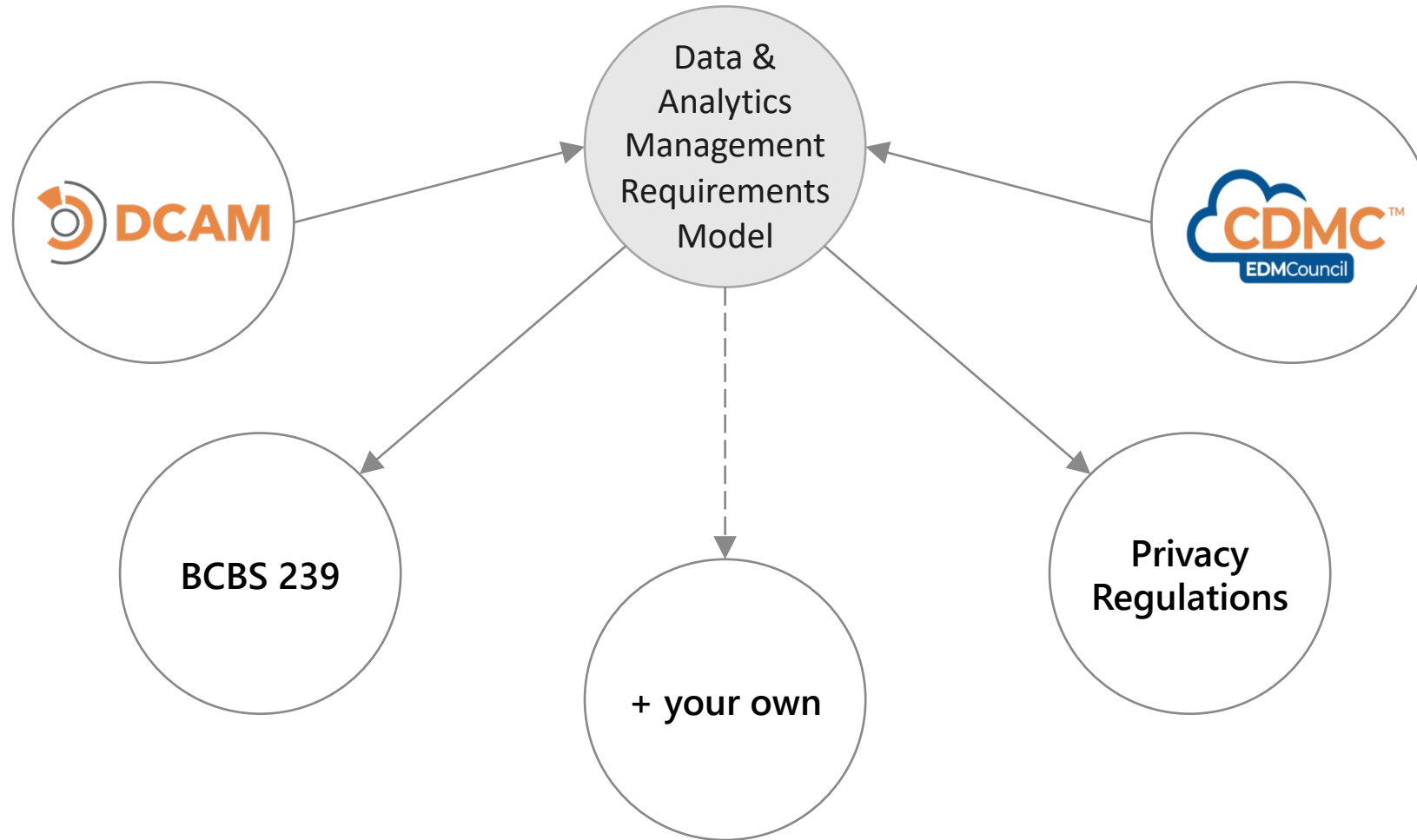
Welcome to our presenters

Mark McQueen

Managing Partner – US

rtecha

Philip Dutton

Co-CEO & Co-Founder

Solidatus

Matt McQueen

Senior Consultant

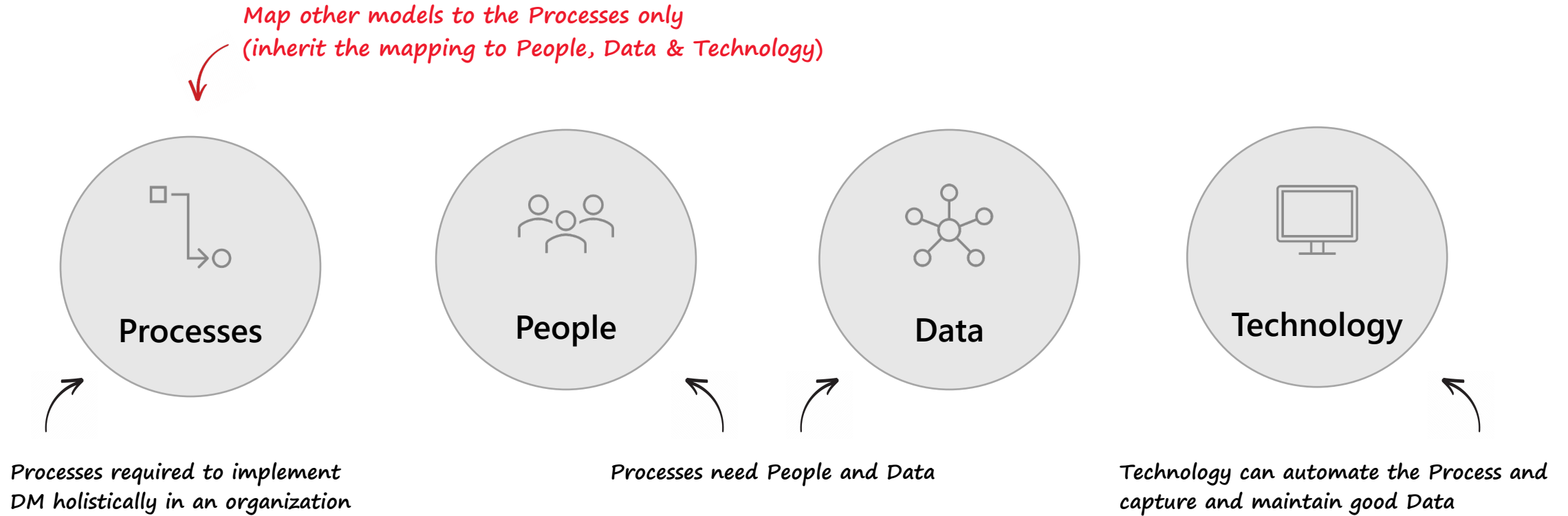rtecha

Requirements Model

Mark McQueen

Managing Partner – US

Underlying requirements for managing your data

**Map other models to the Processes only
(inherit the mapping to People, Data & Technology)**

Processes

People

Data

Technology

Processes required to implement
DM holistically in an organization

Processes need People and Data

Technology can automate the Process and
capture and maintain good Data

How it's structured

Roles & Responsibilities of individuals and DM governing bodies

Program, Operations and Governance

85 Processes

5 People

6 Data

52 Technology
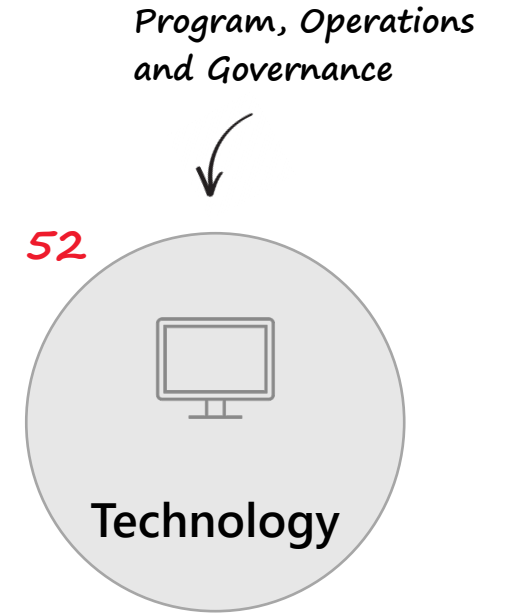
Program, Operations and Governance

Control Framework and Standard Data Models, Taxonomies & Metrics

An example: Data Remediation

Processes

People

Data

Technology

Process ➔ Process

Data remediation is dependent on Data Quality measurement

Process ➔ People

DM function practitioners

Process ➔ Data

Data requirements are identified via the data catalog process

Process ➔ Technology

A system is needed to manage issues
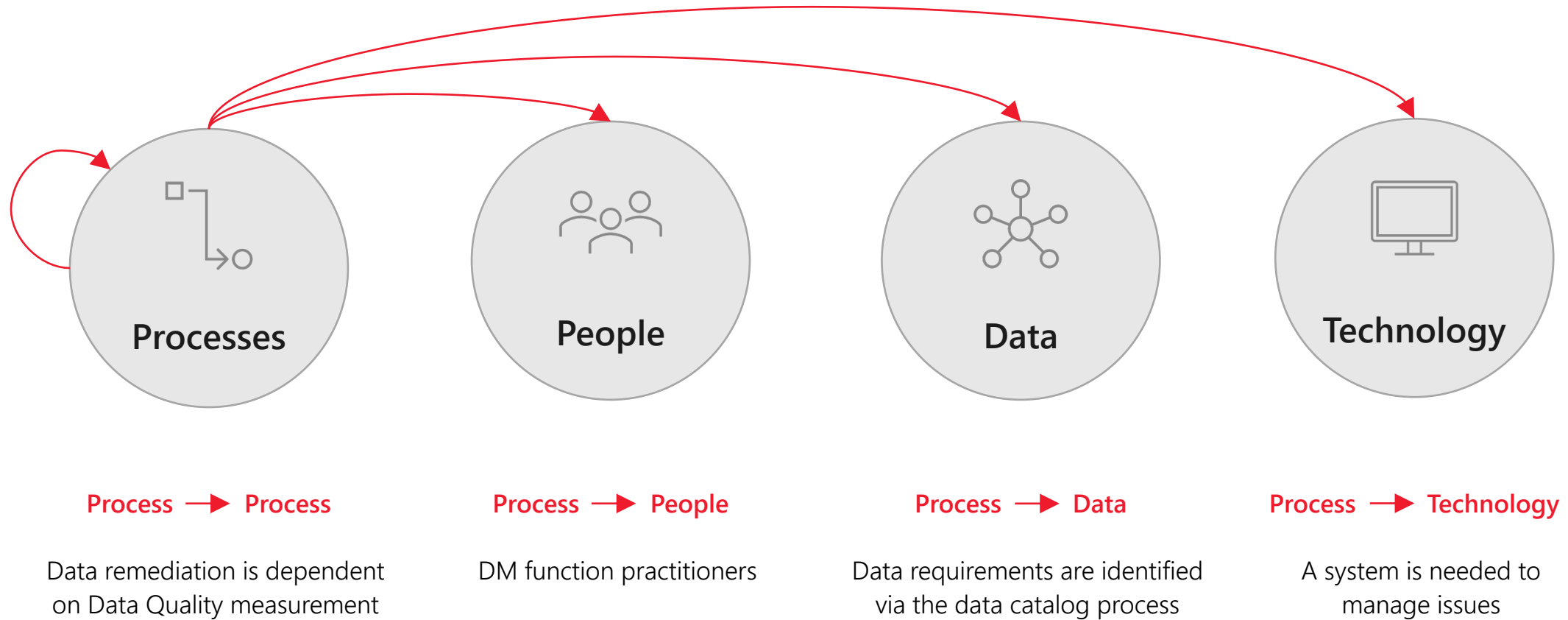
Adding DCAM & CDMC Frameworks

What are DCAM and CDMC?

DCAM® is the **D**ata Management **C**apability **A**ssessment **M**odel

CDMC™ is the **C**loud **D**ata **M**anagement **C**apability Model
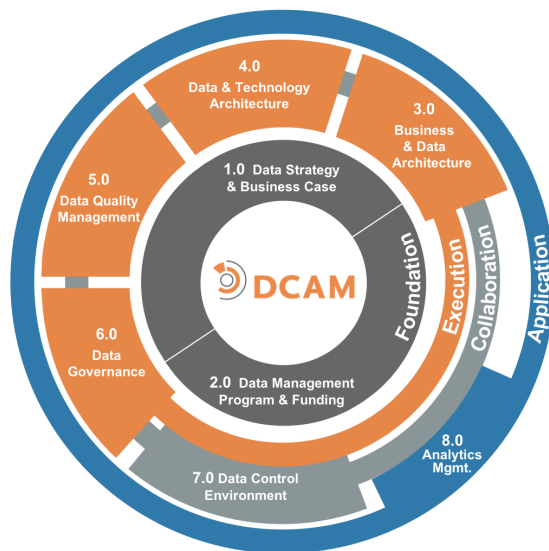
DCAM is a comprehensive data & analytics management framework
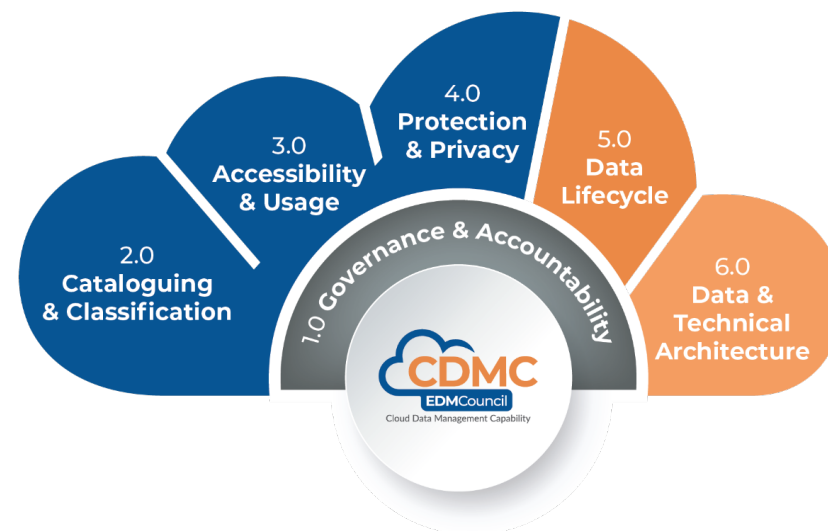
CDMC is a framework that addresses the unique opportunities and challenges of managing data in the cloud

These industry-standard best practice Data Management frameworks are developed by the EDM Council. DCAM is available to members and CDMC is available as a free license to members and non-members.

Mapping DCAM/CDMC to the Requirements Model

DCAM Framework

1. Data Management Strategy & Business Case

2. Data Management Program & Funding Model

3. Business & Data Architecture

4. Data & Technology Architecture

5. Data Quality Management

6. Data Governance

7. Data Control Environment

8. Analytics Management

Requirements Model

Processes

People

Data

Technology

CDMC Framework

1. Governance & Accountability

2. Cataloguing & Classification

3. Accessibility & Usage

4. Protection & Privacy

5. Data Lifecycle

6. Data & Technical Architecture

7. CDMC Key Controls & Automations

Our example: Data Remediation

DCAM Framework

1. Data Management Strategy & Business Case

2. Data Management Program & Funding Model

3. Business & Data Architecture

4. Data & Technology Architecture

5. Data Quality Management

6. Data Governance

7. Data Control Environment

8. Analytics Management

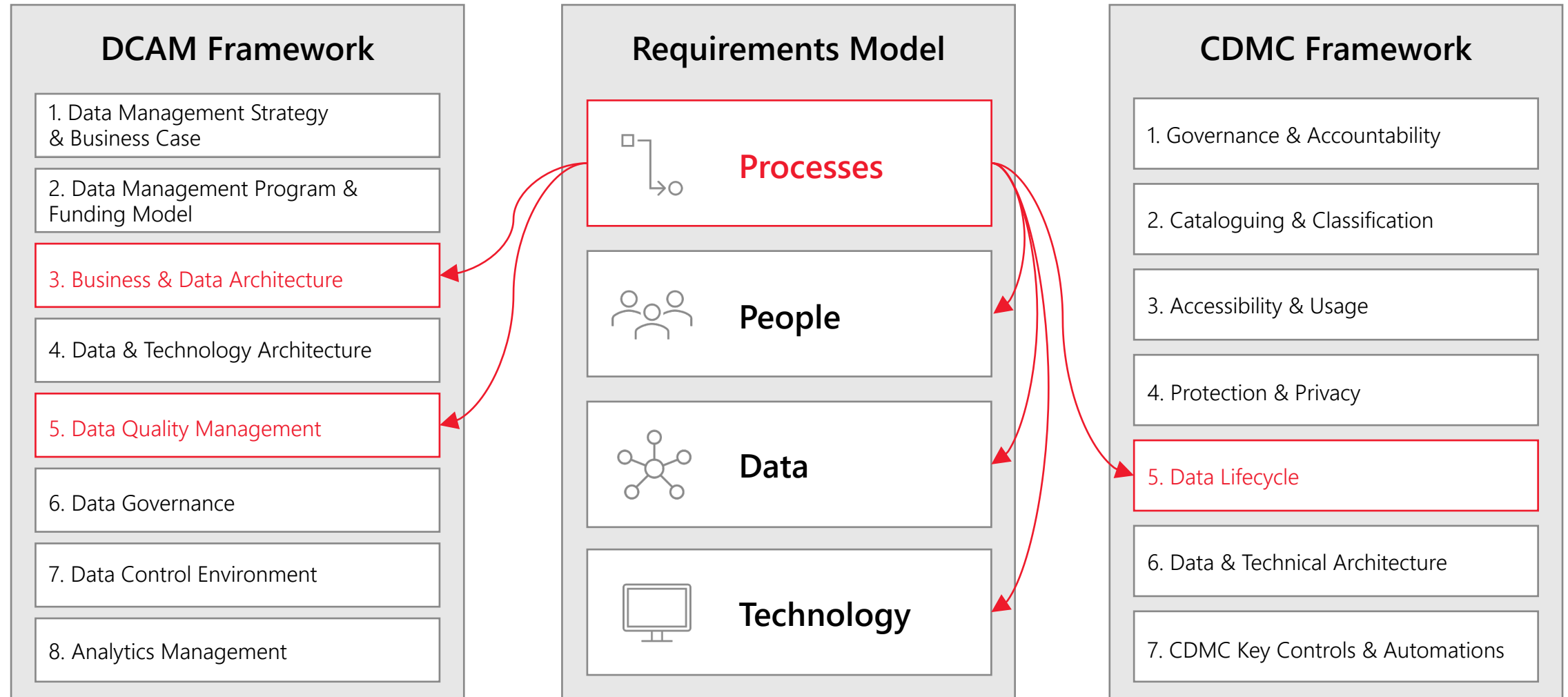## Requirements Model

Processes

People

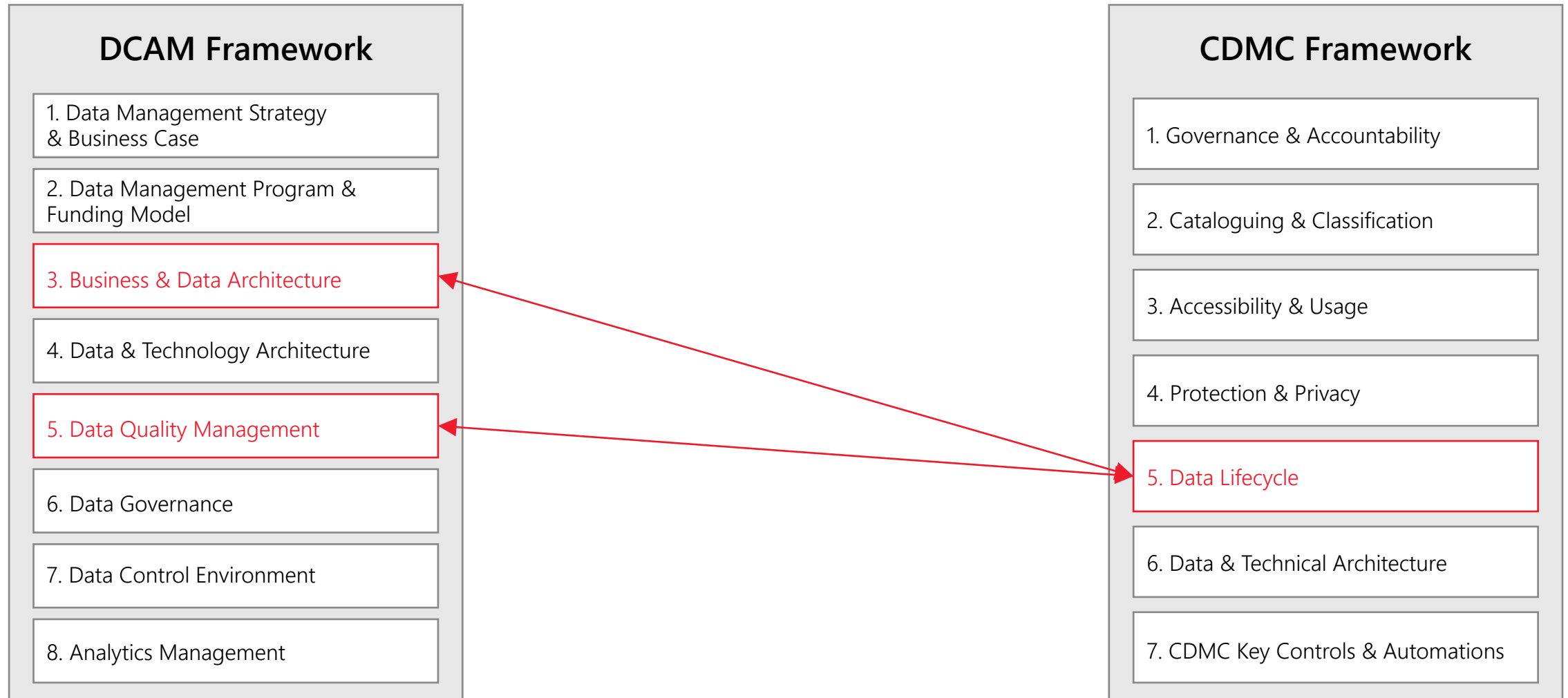**Data**

Technology

CDMC Framework

1. Governance & Accountability

2. Cataloguing & Classification

3. Accessibility & Usage

4. Protection & Privacy

5. Data Lifecycle

6. Data & Technical Architecture

7. CDMC Key Controls & Automations

Our example: Data Remediation

Scenario 1: Anna is starting a greenfield Data Management function

Anna, new CDAO

- New DM function

- DCAM chosen

- Considering Cloud

- No Solidatus license

Using the DCAM & CDMC model, Anna can...

Prioritize and sequence her DM capability design, and align it to her start-up Data Strategy

Create a DM capability roadmap for the first year, which helps to build buy-in from the CEO and leadership team

Draw up the expertise and roles she needs to create an Office of Data Management

Start to articulate the value of managing data in the cloud

Scenario 2: Bob's done a DCAM Assessment and wants to improve his score

Bob, CDAO

- DM established

- DCAM Assessment

- Solidatus license

Using the DCAM & CDMC model, Bob can...

Add his DCAM scores to the model, at both at an enterprise level and for individual divisional groups
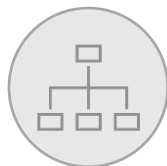
Compare DCAM scores across different divisions to identify capability gaps specific to certain teams

Reveal process dependencies and any gaps in his Data Management technology tool stack

Create a capability uplift plan and set uplift targets for the next annual DCAM assessment

Scenario 3: Charlie is starting to use CDMC

Using the DCAM & CDMC model, Charlie can...

Add his DCAM Assessment scores and CDMC Readiness Assessment scores to the model, to identify capability gaps

Analyze the DCAM sub-capabilities that share a relationship to CDMC sub-capabilities to see the foundations he needs

Identify the areas that CDMC does not map to, to understand the basic capabilities still needed

Create an uplift roadmap to fill gaps in capabilities, based on the required dependencies and sequencing

Charlie, CDAO

- DM established

- DCAM Assessment

- CDMC Assessment

- Solidatus license

Adding regulations

Philip Dutton

Co-CEO & Co-Founder

Solidatus

Aligning regulations: Privacy

Through analysis of the regulation, organize an interpretation object based on impacts to data or data management

Privacy Regulations

Privacy Thematic Areas
- Data Subject Rights
- Data Handling Rights
- Training
- Governance & Accountability
- Security
- Change Management
- Audit

GDPR

DCAM Framework

1. Data Management Strategy & Business Case

2. Data Management Program & Funding Model

3. Business & Data Architecture

4. Data & Technology Architecture

5. Data Quality Management

6. Data Governance

7. Data Control Environment

8. Analytics Management

Requirements Model

Processes

People

Data

Technology

CDMC Framework

1. Governance & Accountability

2. Cataloguing & Classification

3. Accessibility & Usage

4. Protection & Privacy

5. Data Lifecycle

6. Data & Technical Architecture

7. CDMC Key Controls & Automations

Aligning regulations: Privacy

Privacy Regulations

Privacy Thematic Areas
- Data Subject Rights
- Data Handling Rights
- Training
- Governance & Accountability
- Security
- Change Management
- Audit

GDPR

DCAM Framework

1. Data Management Strategy & Business Case

2. Data Management Program & Funding Model

3. Business & Data Architecture

4. Data & Technology Architecture

5. Data Quality Management

6. Data Governance

7. Data Control Environment

8. Analytics Management

Requirements Model

Processes

People

Data

Technology

CDMC Framework

1. Governance & Accountability

2. Cataloguing & Classification
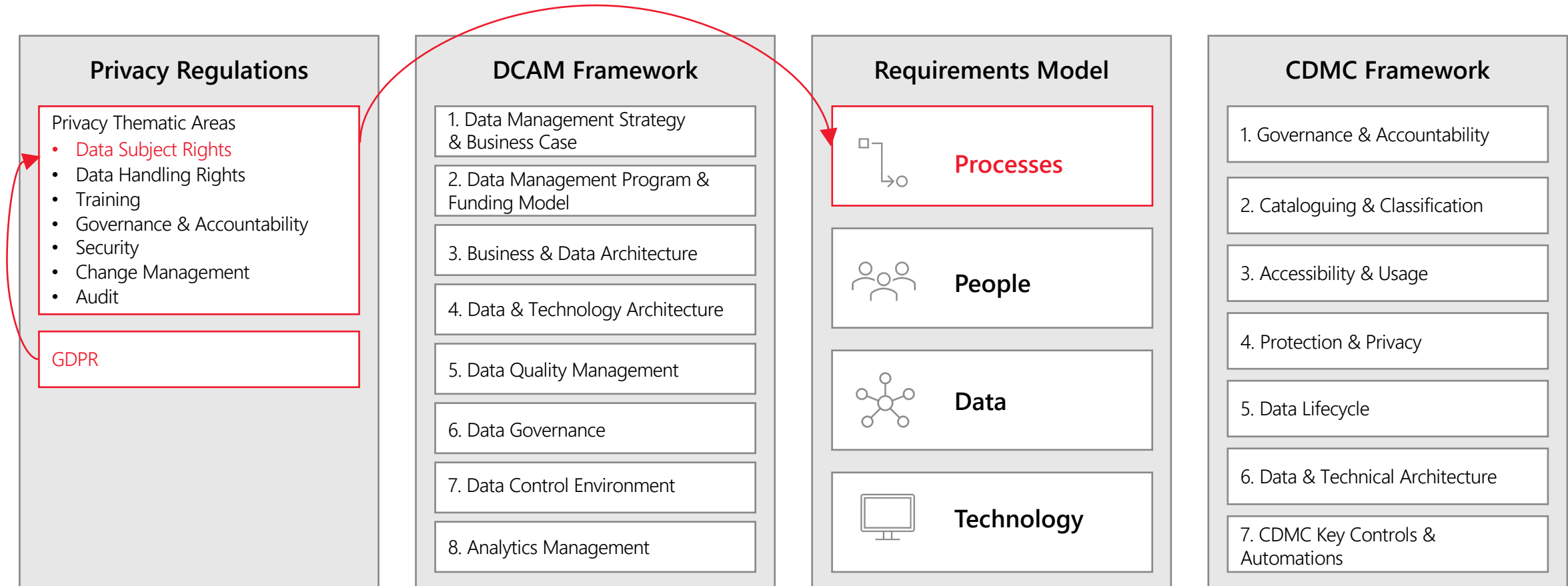
3. Accessibility & Usage

4. Protection & Privacy

5. Data Lifecycle

6. Data & Technical Architecture

7. CDMC Key Controls & Automations

Aligning regulations: Privacy

Privacy Regulations	DCAM Framework	Requirements Model	CDMC Framework

Privacy Regulations

Privacy Thematic Areas
- Data Subject Rights
- Data Handling Rights
- Training
- Governance & Accountability
- Security
- Change Management
- Audit

GDPR

DCAM Framework

1. Data Management Strategy & Business Case

2. Data Management Program & Funding Model

3. Business & Data Architecture

4. Data & Technology Architecture

5. Data Quality Management

6. Data Governance

7. Data Control Environment

8. Analytics Management

Requirements Model

Processes

People

Data

Technology

CDMC Framework

1. Governance & Accountability

2. Cataloguing & Classification

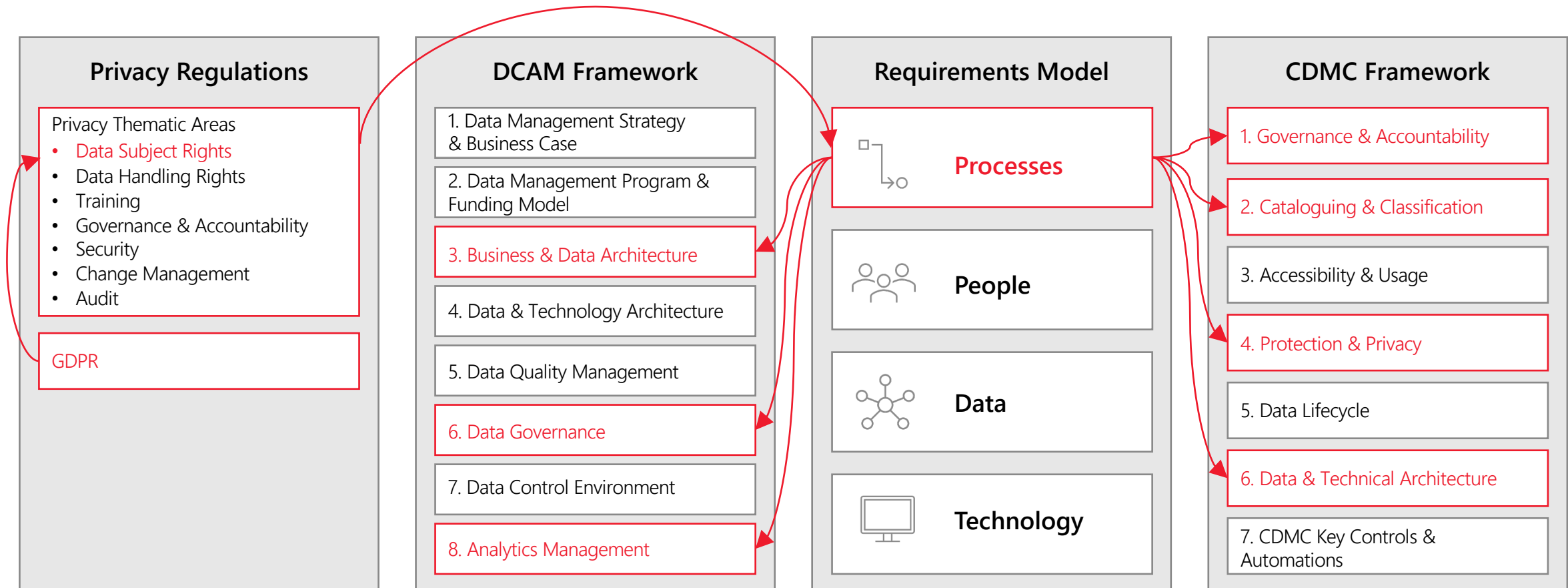3. Accessibility & Usage

4. Protection & Privacy

5. Data Lifecycle

6. Data & Technical Architecture

7. CDMC Key Controls & Automations

Scenario 4: Deeksha is checking compliance with Privacy regulations

Deeksha, CDAO

- Privacy regulations

- Multi-jurisdiction

- DCAM Assessment

- Solidatus license

Using the Global Privacy Regulations model, Deeksha can...

Leverage the industry-standard GDPR requirements to gain understanding and internal approval quickly

Prioritize the data management capabilities required by the privacy process in her capability uplift plans
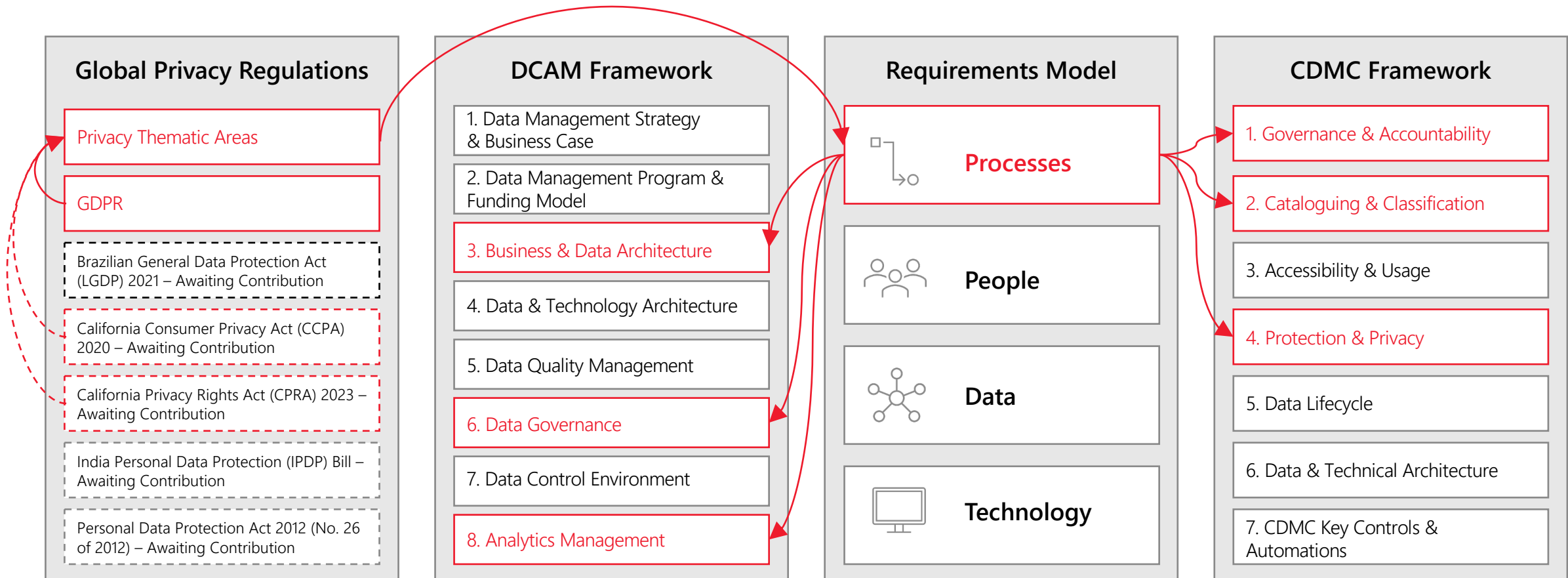
Use the model more broadly to help her Privacy Control team document their processes and compliance narrative

Work with her Chief Privacy Officer to align legislation from other jurisdictions in Solidatus

EDMCouncil

Solidatus

ortecha

Aligning regulations: Privacy – making it global

Global Privacy Regulations	DCAM Framework	Requirements Model	CDMC Framework

Global Privacy Regulations

- Privacy Thematic Areas
- GDPR
- Brazilian General Data Protection Act (LGDP) 2021 – Awaiting Contribution
- California Consumer Privacy Act (CCPA) 2020 – Awaiting Contribution
- California Privacy Rights Act (CPRA) 2023 – Awaiting Contribution
- India Personal Data Protection (IPDP) Bill – Awaiting Contribution
- Personal Data Protection Act 2012 (No. 26 of 2012) – Awaiting Contribution

DCAM Framework

1. Data Management Strategy & Business Case
2. Data Management Program & Funding Model
3. Business & Data Architecture
4. Data & Technology Architecture
5. Data Quality Management
6. Data Governance
7. Data Control Environment
8. Analytics Management

Requirements Model

- Processes
- People
- Data
- Technology

CDMC Framework

1. Governance & Accountability
2. Cataloguing & Classification
3. Accessibility & Usage
4. Protection & Privacy
5. Data Lifecycle
6. Data & Technical Architecture
7. CDMC Key Controls & Automations

From read to write: How best to leverage Solidatus

Discover

The impact of change

- Dependencies
- Gaps in our data management capability
- Identifying, defining and clarifying roles, responsibilities, workflows and controls

Visualize

Dynamic knowledge models that gave us a visual representation

- Technical guidance
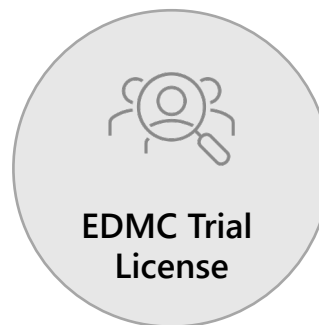- Best practices
- Simplified privacy compliance

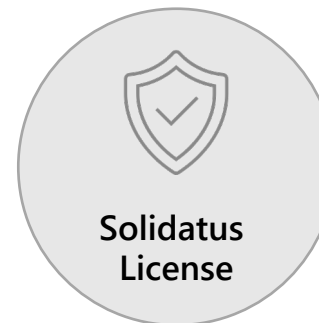## Act

To accelerate and improve DCAM and CDMC assessments

- Linking them directly to our data, people, process, and technology
- Reducing costs by 15-20%
- Reducing risk of fines

License Options

EDMC Trial License

- Single author access to EDMC & Regulatory models
- Tag, classify, catalog, and link data
- Search & version control

Solidatus License

- Collaborate with multiple personas
- Suite of Connectors, API & SDK
- Workflow and automation

EDMCouncil

Solidatus

ortecha

Quick view in Solidatus

Matt McQueen

Senior Consultant

What you're about to see

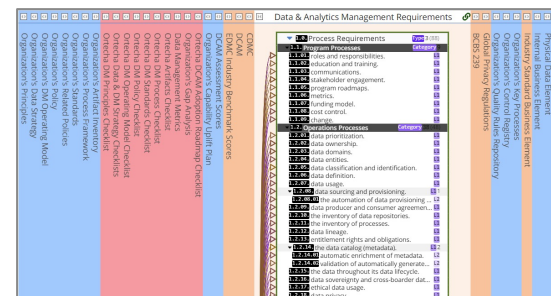Using the read-only versions of the
models available from the EDM Council

The 'Art of the Possible'
when you have your own instance of Solidatus and
can add your organization's content to the models
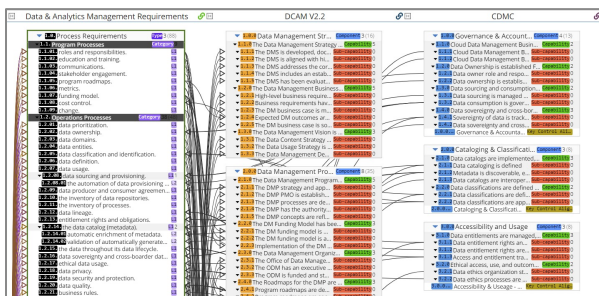
D&A Mgmt Requirements:
DCAM & CDMC Model
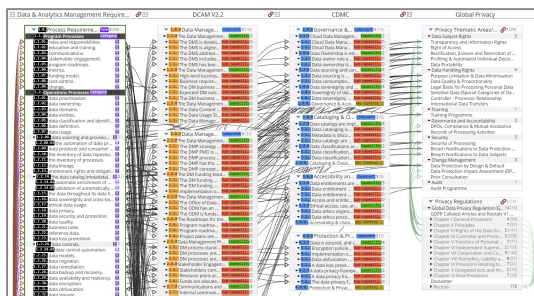
D&A Mgmt Requirements:
Global Privacy Model

Ortecha:
Digital Data Management Value Chain

Quick reminder of how the models can be used

Anna is starting a greenfield
Data Management function

Bob has done a DCAM Assessment
and wants to improve his score

Charlie is starting to use CDMC
to increase automation

Deeksha is checking compliance
with Privacy regulations

Q&A

Colin Gibson

EDMCouncil

Mark McQueen

Ortecha

Philip Dutton

Solidatus

Matt McQueen

Ortecha

Solidatus: Changing the way the world thinks about and manages data

Get in touch with Philip

Your data, by design
build a living digital data blueprint

Connected data governance
understand and manage complex data relationships

Trusted by the regulated and the regulators
rapid adoption by industry leaders across the globe

Helping to transform high priority initiatives, while adding value
Data sharing, ESG, Regulatory compliance, Cloud migration...

hello@solidatus.com

www.solidatus.com

97% would recommend – Gartner Peer Insights

EDMCouncil

Solidatus

Ortecha

Solidatus

Ortecha: the Data Management experts

Diagnose & Measure

I'd like to understand what my Data & Analytics Management capabilities are

Plan & Implement

I need to build my Data & Analytics Management capabilities

Optimize & Automate

I want to improve my Data & Analytics Management capabilities

Train & Sustain

I'd like my people to be coached and guided

Focus & Accelerate

I need to resolve a specific business data problem

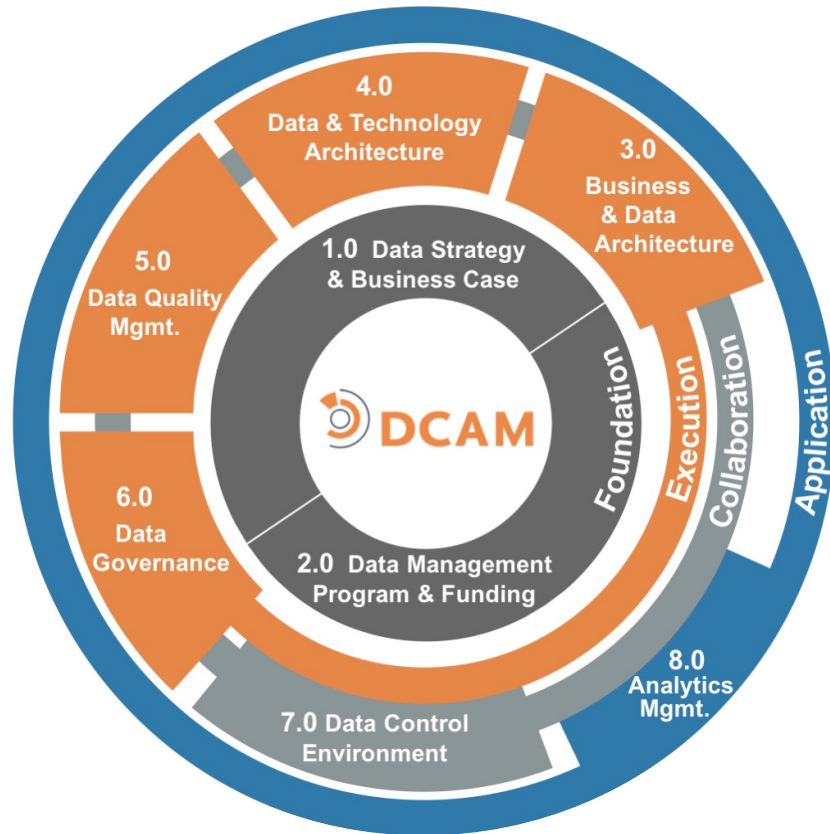## Get in touch with Mark

mark.mcqueen@ortecha.com

www.ortecha.com
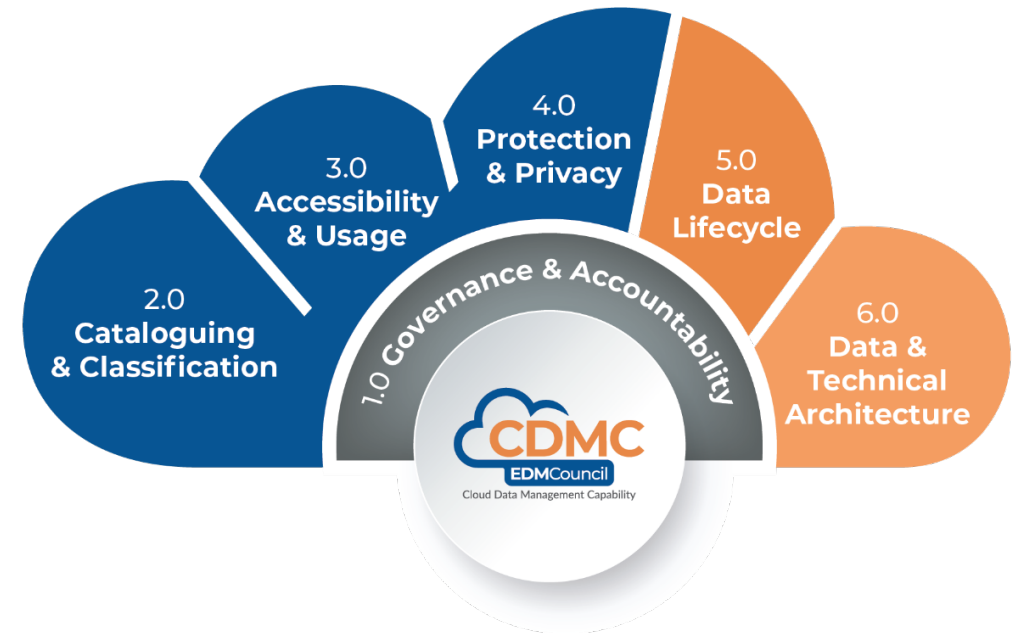
EDM Council: Best Practice Frameworks

Industry-standard best practices for data management and advanced analytics

www.edmcouncil.org > **DCAM**

Download a **free license** for your company's internal use

www.edmcouncil.org > **CLOUD**

For more information, contact **Colin Gibson**: cgibson@edmcouncil.org
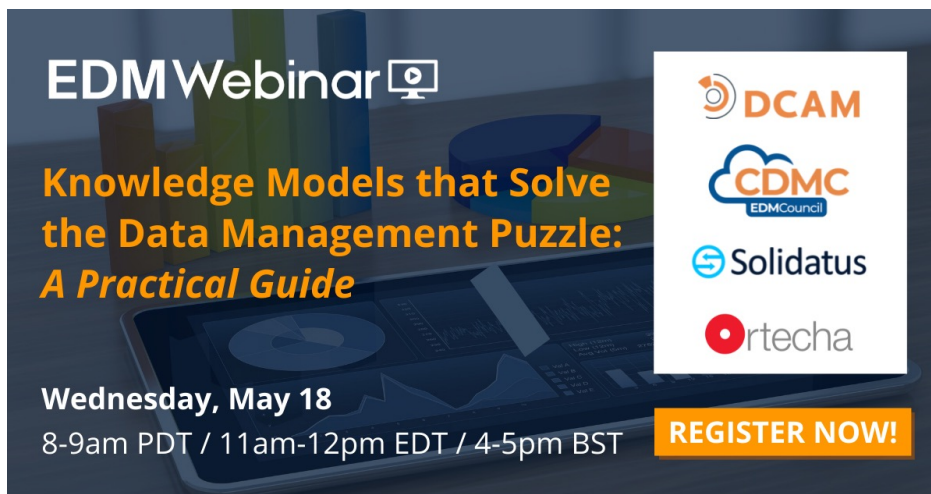
EDM Council: Upcoming events for you and your team

CDO & Data Leaders' Global Summit – May 5

- Largest Global Conference for CDO / Data Leaders
- 40+ sessions | 100+ speakers | 3000+ registrants
- Keynote panel: AWS, Google Cloud, IBM, Microsoft & Snowflake "Accelerating Trusted Cloud Adoption with CDMC"

► **REGISTER**: www.edmcouncil.org

Knowledge Models Webinar: A Practical Guide – May 18

- Part 2 of this two-part webinar series
- A deeper dive for data practitioners
- Invite your team!

► **REGISTER**: https://bit.ly/3LkjfQs

For more information, contact **Colin Gibson**: cgibson@edmcouncil.org

EDM Webinar

Thank you!

Knowledge Models for Data Leaders: Solving the Data Management Puzzle

Part 2 of this two-part webinar series will be held on May 18, 2022

Solidatus
www.solidatus.com

Ortecha
www.ortecha.com

EDMCouncil
www.edmcouncil.org