



EDM Webinar 

Behind Closed Doors: Silicon Valley Bank's Sensitive Data Management Strategies

A conversation with



Peggy Tsai
CDO
BigID



Jennifer Mezzio
Managing Director
Silicon Valley Bank





Moderator: Mike Meriton
Co-Founder & COO
EDM Council



- Joined EDM Council full-time 2015 to lead Industry Engagement
- EDM Council Co-Founder & First Chairman (2005-2007)
- EDM Council Finance Board Chair (2007-2015)
- Former CEO GoldenSource (2002-2015)
- Former Executive for D&B Software and Oracle
- FinTech Innovation Lab – Executive Mentor (2011 – Present)



Peggy Tsai
CDO
BigID



- 18+ years of experience in data management, stewardship & governance at S&P Global, AIG, Morgan Stanley
- Adjunct Faculty at Carnegie Mellon's CDataO Program
- EDM Council Women Data Professional Forum's Global Co-Lead for Events
- CDMC Working Group member and committee member



Jennifer Mezzio

Managing Director, HR Divisional Data Officer
Silicon Valley Bank



- 25 years in IT strategy, business / systems / data analysis, data warehousing & data governance
- Current projects include building & executing and transforming HR into a data-driven organization
- Scope now includes Legal and Cybersecurity
- Masters in Organizational Leadership & Computer Science from Quinnipiac University
- Editorial Board Member for CDO Magazine

Today's speakers

Moderator



Mike Meriton

Co-Founder & COO
EDM Council



Peggy Tsai

CDO
BigID

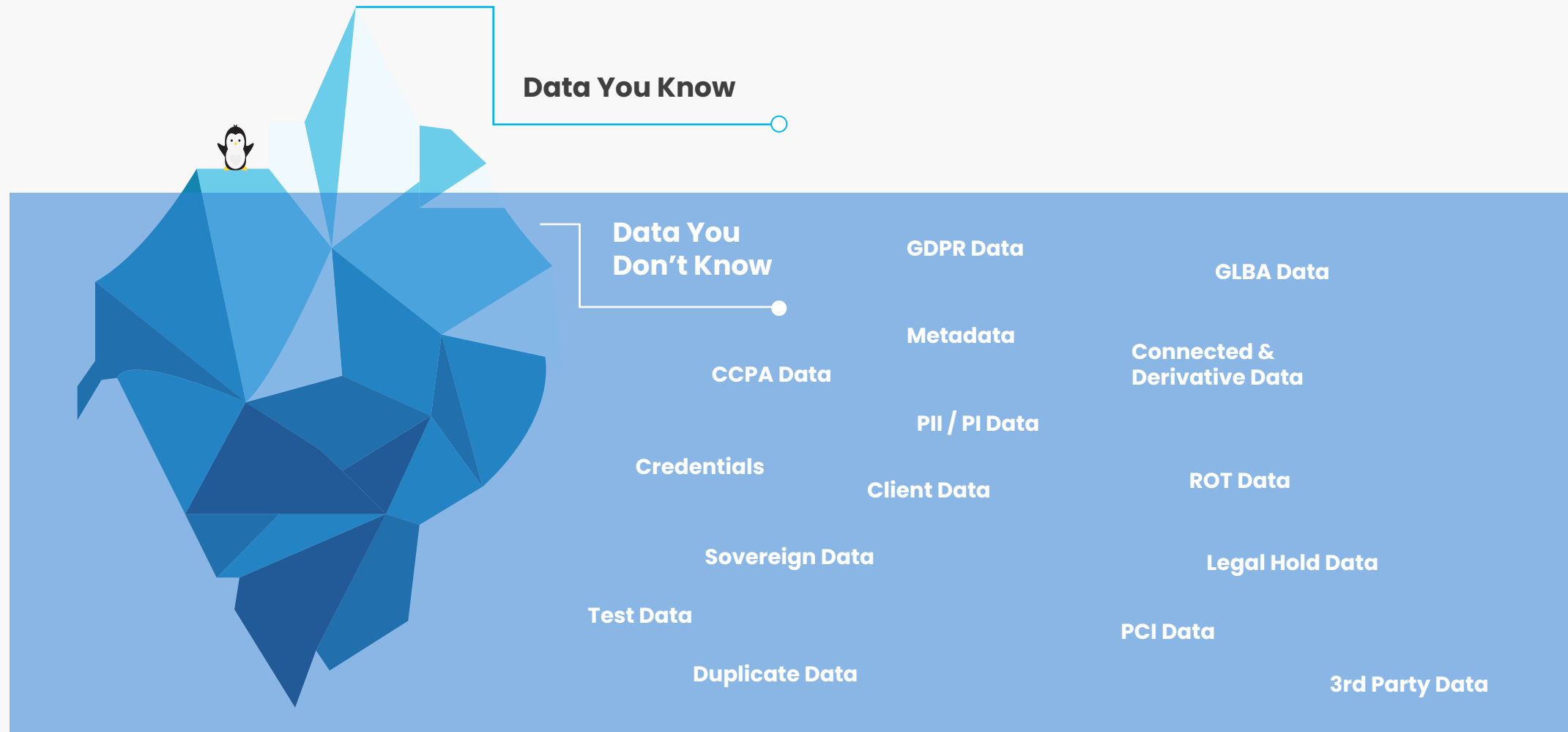


Jennifer Mezzio

Managing Director,
HR Divisional Data Officer
Silicon Valley Bank



New Regulations Driving New Challenges for Managing Sensitive Data



Sensitive Data Management Challenges in the Cloud and On-Prem

More Data Volume

More Places to Collect and Process Data:

AWS S3, Redshift, DynamoDB, EMR, RDS, Aurora, Kinesis, Databricks, Snowflake, Azure Data Lake, 0365, ServiceNow, Salesforce, Confluent, Jira, GitHub, GitLab, Cohesity, Confluence, Athena

More Data Velocity

More Speed of Data Change:

Data volumes exploding exponentially as it becomes easier to add, copy, move in cloud with ephemeral data sets, platforms like snowflake and databricks, email, files +

More Data Variety

More Kinds of Regulated, Sensitive, Critical Data To Track

GLBA, HIPAA, PCI, SOX, GDPR, CCPA, PII, PI, PCI, Credentials, CID, Patents, Research, ML Models, Data Combos

More Data Vulnerability

How do you measure & remediate risk:

open access, excessive privileges, duplicate data, sovereign data, misconfigurations, ROT data, credential leaks, embedded code



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Facts at a Glance

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Problem Statements



- Due to the inexpensive cost of storage, companies have gone from “data collectors” to “data hoarders”
- Data is in various systems both in and outside of HR
- Difficult to easily identify data outside of the retention policy i.e. – out of compliance
- Retention policy has multiple retention limits for one record making purge extremely difficult
- Purging is a highly manual and tedious process
- Purging for 1 record has to happen across all levels – physical, source system, structured and unstructured repositories, digital etc.

What is your organization's biggest challenge with sensitive data management? Select one.

- 1) Difficult to identify data outside of retention policy
- 2) Inexpensive storage costs encourage 'hoarding' of data
- 3) Manual and tedious process to identify data to be in compliance
- 4) Lack of prioritization across teams to manage sensitive data
- 5) Other (specify in chat)

HR Initiatives and Challenges



- **Purging of data is highly manual due to the complexity of scenarios, multiple targets, structured and unstructured repositories, and lack of automation**
- **Employee data is more than just the worker record, it's spouse/dependent data, investigations, training, surveys, workforce planning, etc.**
- **Risk and exposure of sensitive data is reduced by having the IT and data verticals reside within the HR Organization - what about outside HR?**
- **Need a secure way for Human Resources data outside of HR to be consumed by teams across the Enterprise**
- **Need to document data lineage all the way to final rest – including 3rd party vendor applications**

Intended Outcomes

- Robust inventory of data elements which includes classification and source to target lineage - currently manually updated
- Tag and catalog the data elements across various repositories
- Easily identify the data elements and records that need to be retained or purged in accordance to the retention policy
- Create an automated retention and purge process that is accurate and operationalized across all of HR and SVB
- Align purge and retention efforts across all unstructured and structured repositories throughout the Enterprise



What is your organization's technology-readiness level to help manage sensitive data? Select one.

- 1) **Innovators - We successfully implemented solutions and processes**
- 2) **Early Adopters - We implemented solution(s) and developing the policies and processes for our teams**
- 3) **Early Maturity - We started to explore solutions and will do so within the next 12 months**
- 4) **Late Maturity - We do not plan to adopt until 2024 or later**
- 5) **Laggards - It is not in our roadmap**

Additional Industry Use Cases for Discovery, Classification & Data Mapping

Industry Use Case: AI-Discovery and Know Your Data

Automatically classify and tag data for data management across your entire data landscape.

Discover

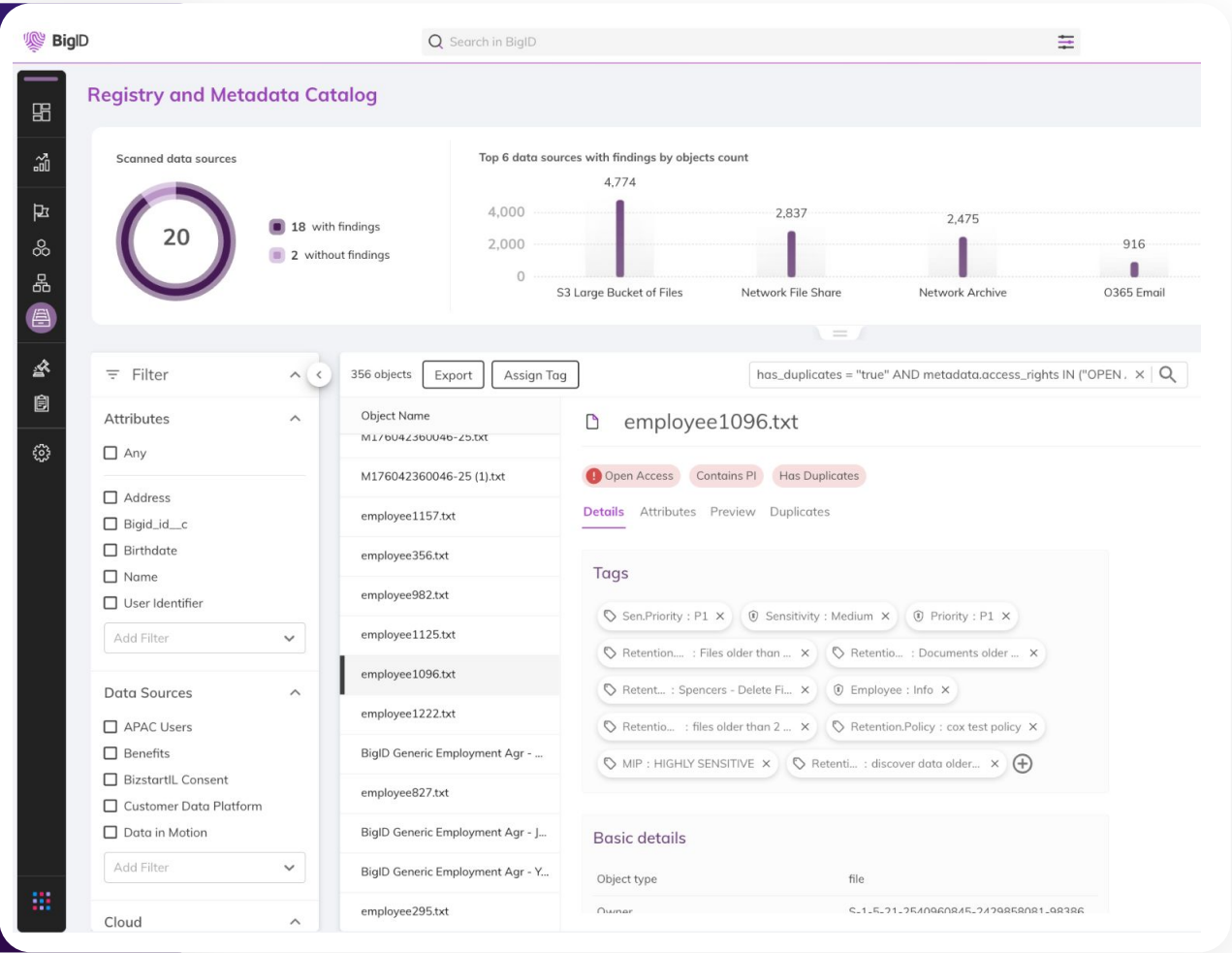
Automatically identify and label data and metadata based on sensitivity, risk, and type

Classify

Automatically classify, tag, and categorize crown jewel data with ML & NLP

Extend

Extend data management to an always up to date dynamic data inventory



Automate preferences, data rights, assessments, RoPA and more from dynamic data map.

RoPA GDPR Article 30

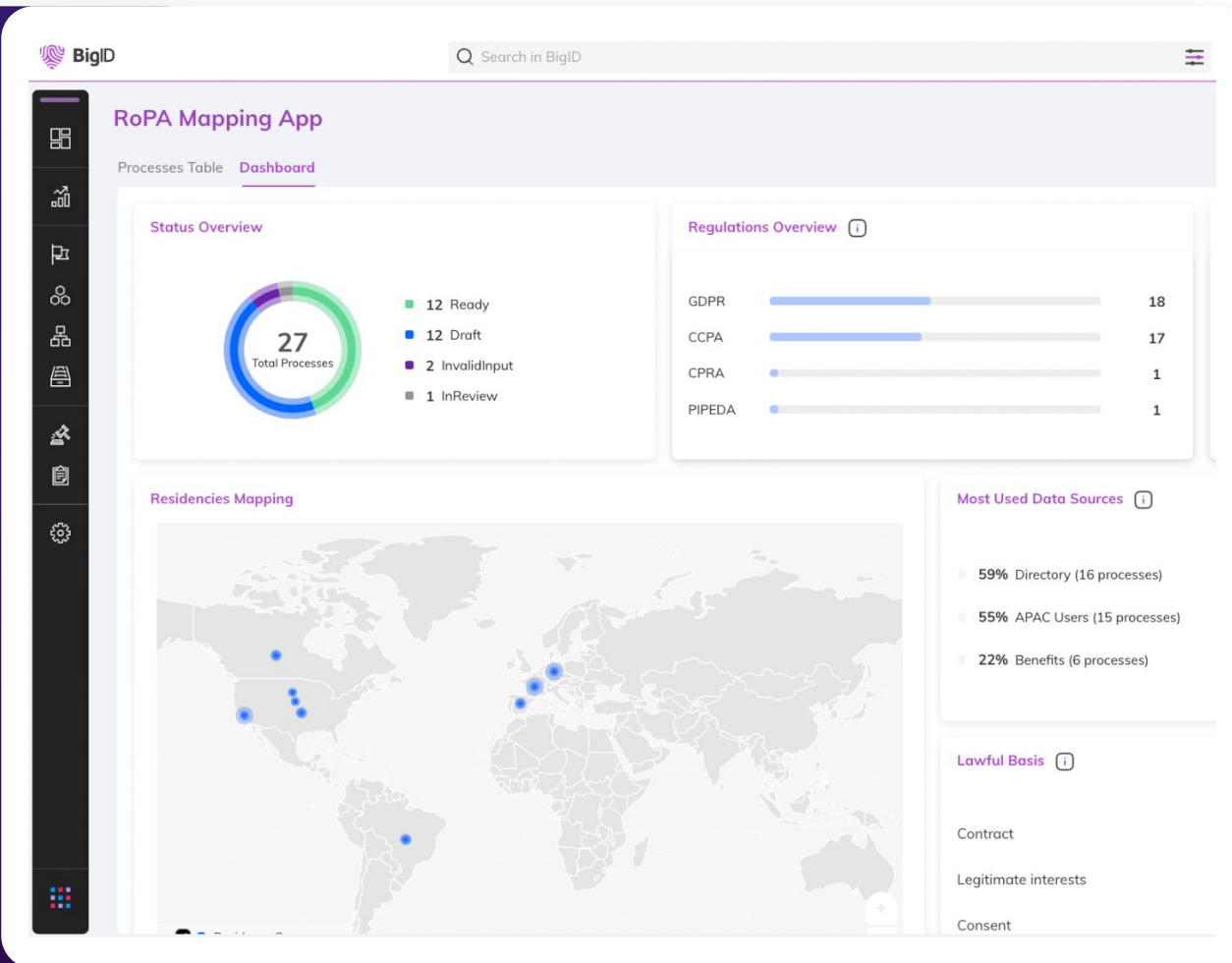
Document GDPR RoPA for how you collect, process and dispose of data.

Assessments

Generate PIAs from discovered data maps dynamically.

TIA

Build cross-border assessments from detected data transfers.



Consistently manage data aging, reduce redundant data, improve system hygiene, and manage data retention based on age, policy, and more.

Structured

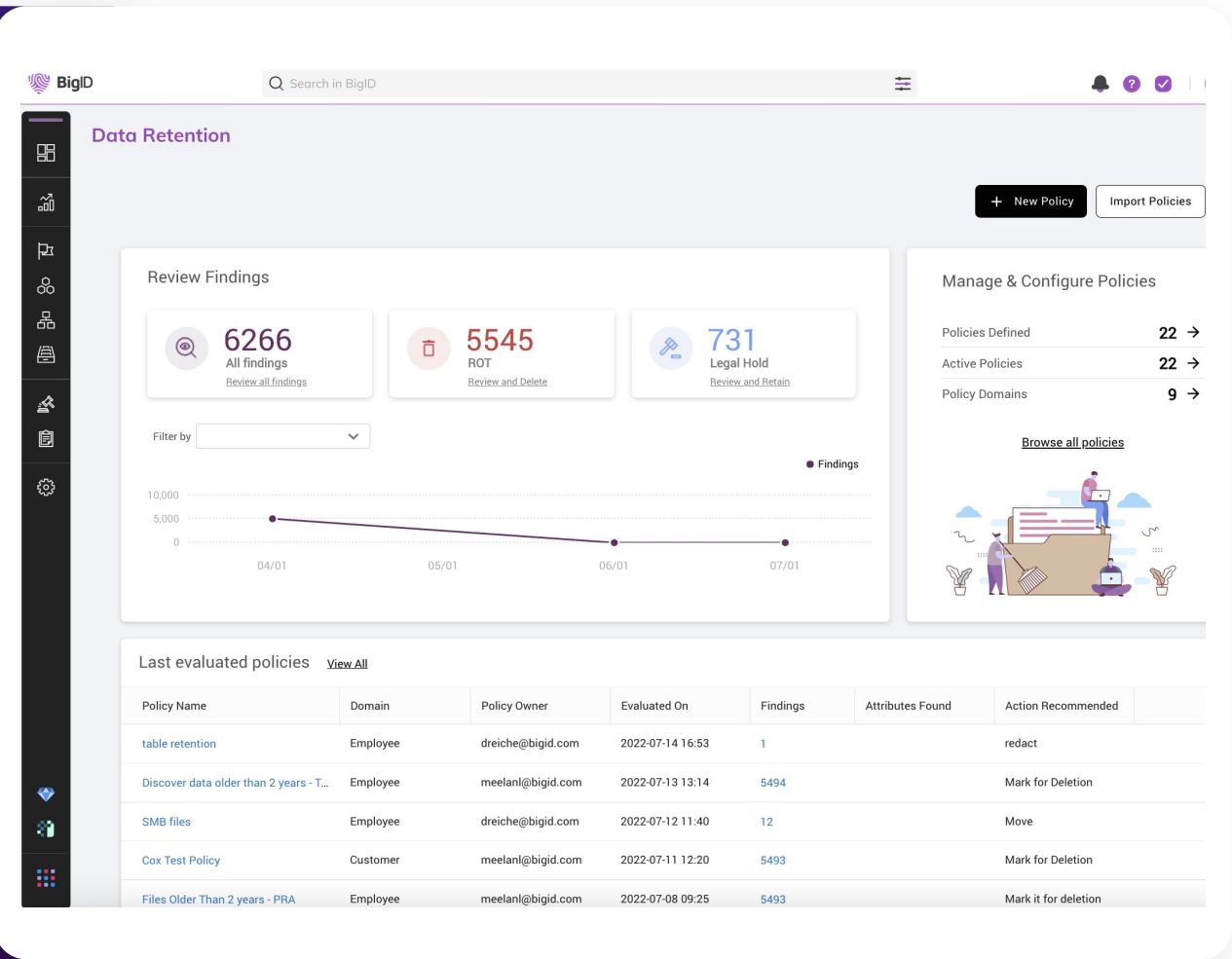
Managed data lifecycle across structured data sets

Unstructured

Define policies, rules and track lifecycle on files and images

Global Schedules

Track global retention schedules for different regulations automatically



Questions?

Break down the data silos with

One Platform.

Improve visibility and control with a single interface - and modular apps within the platform. Drive better decisions and outcomes with greater context, insight, and accuracy of your data.



Discover dark data and find all sensitive data, improve security posture, reduce risk



Accelerate cloud migrations, data validation for M&A, and avoid audits



Fill gaps in the security stack with a data-centric approach to get more value from your existing tech stack



Achieve compliance, comply with data privacy and protection regulations, and avoid audits



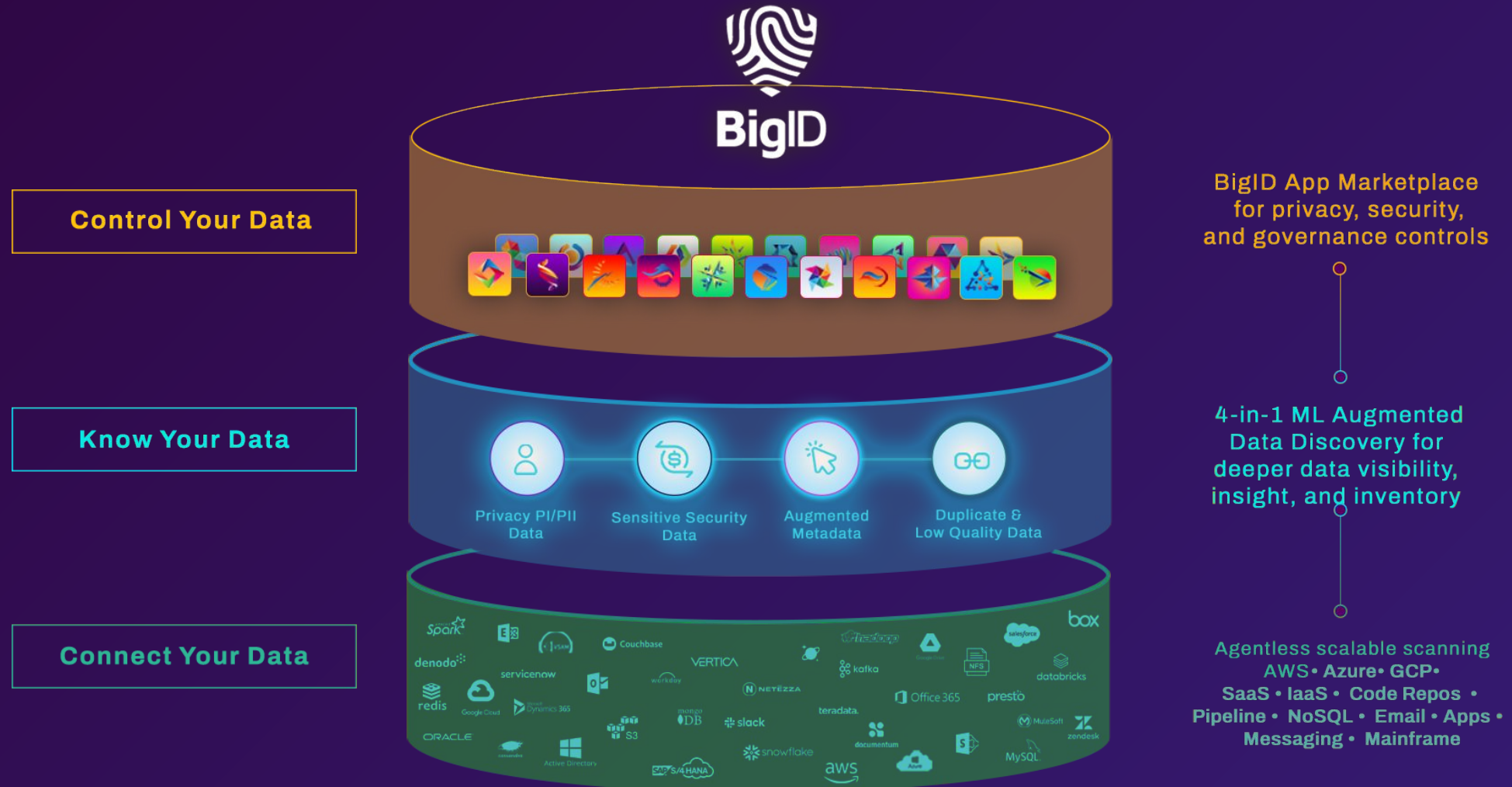
Enable security frameworks: NIST, HITRUST, CIS CSC, Zero Trust

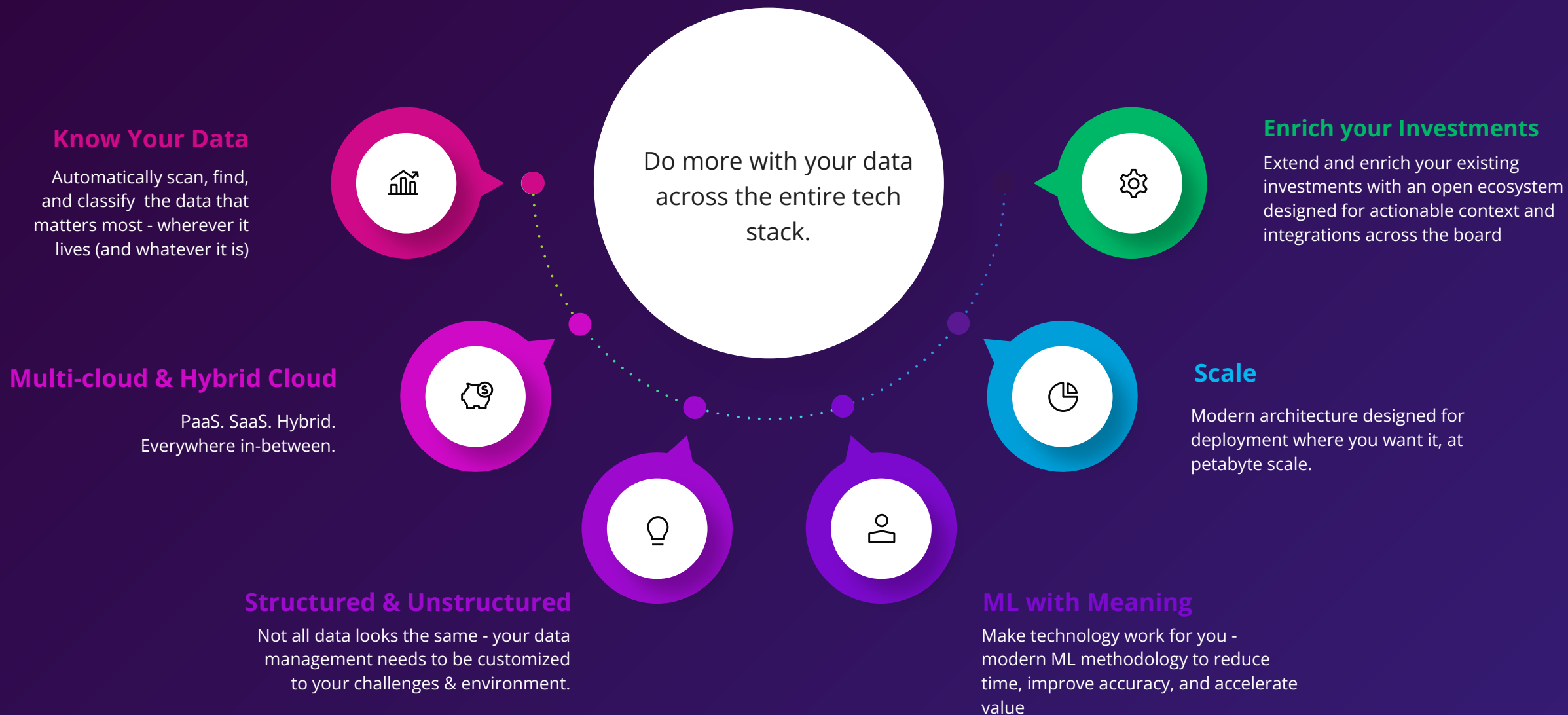


Make better decisions and accelerate security initiatives with more accuracy and confidence in understanding enterprise data

Open Extensible Data Visibility & Control Platform

One Platform Deployable as SaaS, Edge-to-Cloud, or Self-managed







Thank you!



Additional Questions?
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