



DATA GOVERNANCE AND MASTER DATA MANAGEMENT CONFERENCE EUROPE

11 - 14 March 2024 | London, UK

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HOW TO BUILD AND MANAGE A WINNING DATA TEAM

Gerard Bartley

Monday 11th March – 2:20pm

WHAT WE WILL SEE IN THE NEXT 30 MINUTES

- Not enough time to tell you everything, so this is just highlights...
- But, we will cover:
 - What data your team should manage – and why
 - Your team's management philosophy
 - A team structure
 - Recruitment
 - SLAs
 - Factors of a winning team
- Hang on to your hats as it'll be **fast!**

GERARD BARTLEY

- Various roles in finance and data management for:



- Please feel free to ask me questions via: <https://www.linkedin.com/in/gerard-bartley/>

WHAT REALLY IS THE POINT OF ALL OF THIS?

DATA QUALITY

is the point...

Or more accurately...

SUFFICIENT DATA QUALITY FOR THE NEEDS OF THE BUSINESS

WHAT IS IN A STANDARD DATA MANAGEMENT MODEL

PEOPLE

The right people, in the right place, with the right behaviours, training and skills managing the data

PROCESSES

Effective processes for collecting, checking, entering and cleansing the data

TECHNOLOGY

The right level of technological support for the people and the processes

DATA

The most appropriate data model for the business, effectively governed and clearly defined to best support users' needs

A MESSAGE BEFORE WE START...

DATA QUALITY IS ACHIEVED BY GETTING PEOPLE TO DO WHAT THEY SHOULD DO, WHEN THEY SHOULD DO IT

So

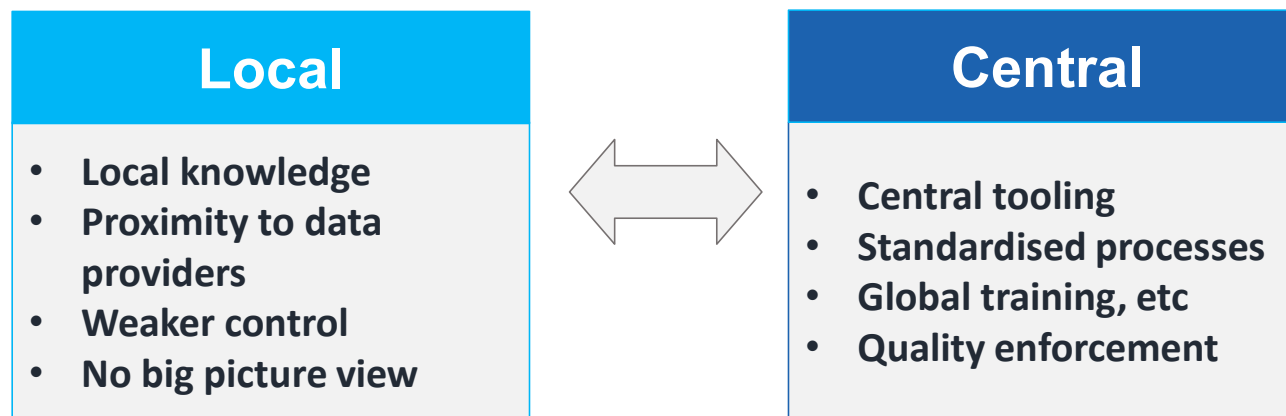
**MASTER DATA MANAGEMENT
IS ALL ABOUT PEOPLE NOT TECHNOLOGY**



SCOPE

WHAT DATA SHOULD YOUR TEAM MANAGE CENTRALLY 1/2?

- Data is:
 - Always **generated** locally...
 - And then either **input** centrally or locally.
- Which data is input where “depends” on business priorities (later):



- Remember – data **ownership** may have a different central/local split!

WHAT DATA SHOULD YOUR TEAM MANAGE CENTRALLY 2/2?

- What data should be in scope of your MDM team depends on:

STRATEGY

What is the overall data philosophy of the business? (Next slide)

VALUE

The more important the data is to the business, the stronger the case for management

USAGE

It is more important that globally used data is controlled, than purely local

COMMONALITY

The greater the number of systems the data is used in then the greater the need for control

DEPENDANCY

It makes little sense to control data which is dependent on uncontrolled data

EASE

(If it is easy to control it, then do it)

- Remember – the worse the quality of the data or knowledge about it, the more the chance of misuse...

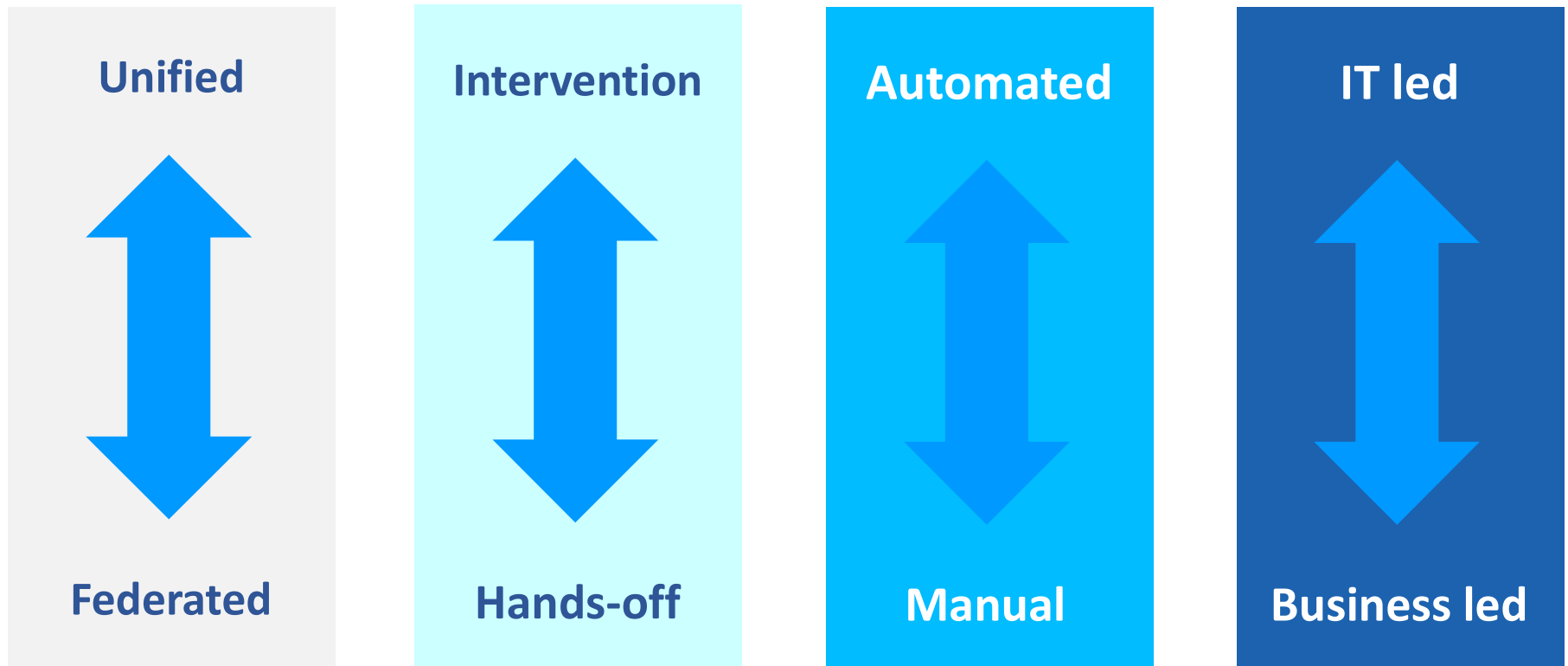
ELEMENTS OF A DATA STRATEGY

	DEFENSIVE	OFFENSIVE
KEY OBJECTIVES	Ensure data security, privacy, integrity, quality, regulatory compliance (and governance)	Improve competitive position and profitability
CORE ACTIVITIES	Optimize data extraction, standardization, storage and access	Optimize data analytics, modeling, visualization, transformation, and enrichment
DATA-MANAGEMENT ORIENTATION	Control	Flexibility
ENABLING ARCHITECTURE	SSOT (Single source of truth)	MVOTs (Multiple versions of the truth)

- It is important to be clear on broad approach **up front** as this will impact you operationally in all aspects of data management...

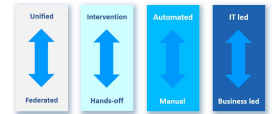
MDM FUNCTION APPROACH/PHILOSOPHY

THE FOUR PILLARS



KEY APPROACHES TO DATA MANAGEMENT

UNIFIED VERSUS FEDERATED



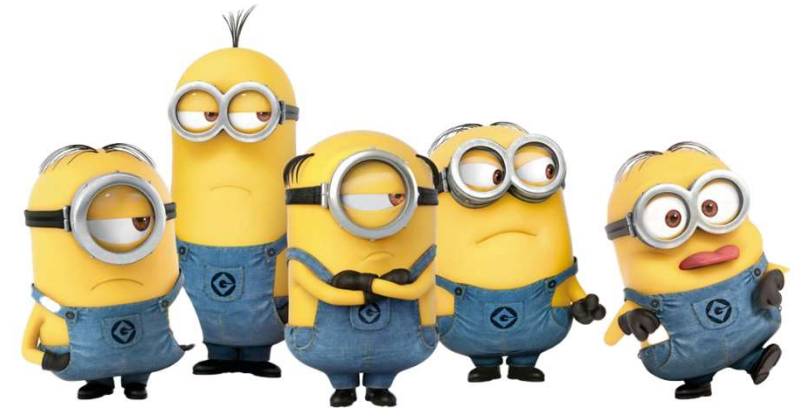
Unified



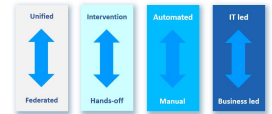
Federated



Vs

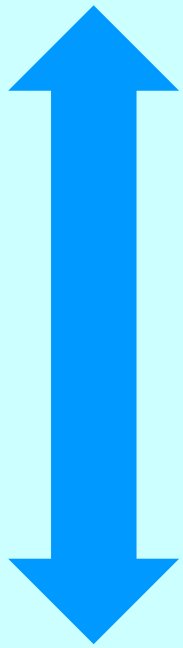


- Unified is:
 - Maximum **centralisation** of data management & governance
 - One way of **working**
 - One set of **rules** and **field formats**
- Federated Isn't
- Easier with single ERP. Very tricky without.



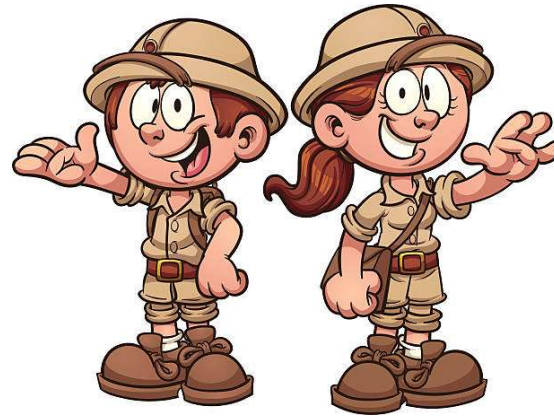
INTERVENTION VS HANDS-OFF

Intervention



Hands off

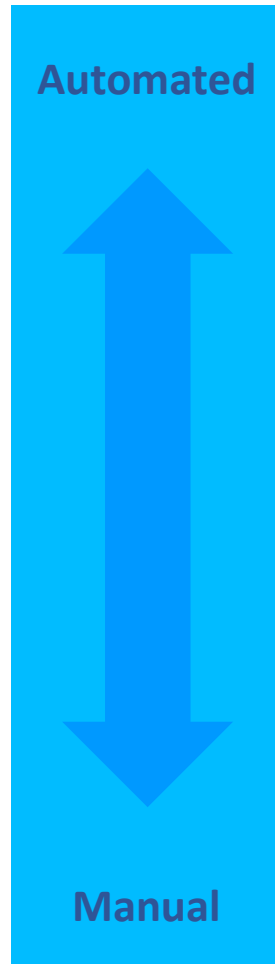
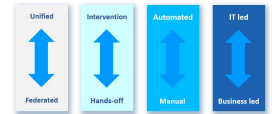
- **Who takes responsibility** for the data **quality**?
- “We’ll check everything” vs. “We’ll just load it!”
- Depends on how you see your **users**:



Vs



AUTOMATED VERSUS MANUAL

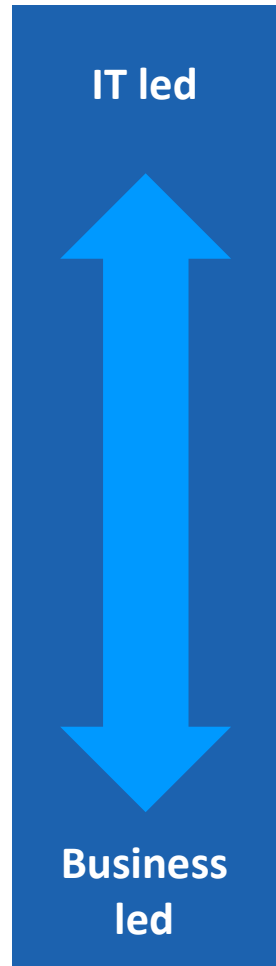
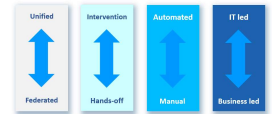


Vs



- Possible to manage the entire process via:
 - Workflow tool, and;
 - Upload tools
- *Zero touch*. Sounds great, eh?
- But - the pitfalls are many and the costs are high...

IT LED VERSUS BUSINESS LED



- Where does data management sit? IT or “The Business”



Vs



Business:

- Independent
- Business focused
- Lower tech

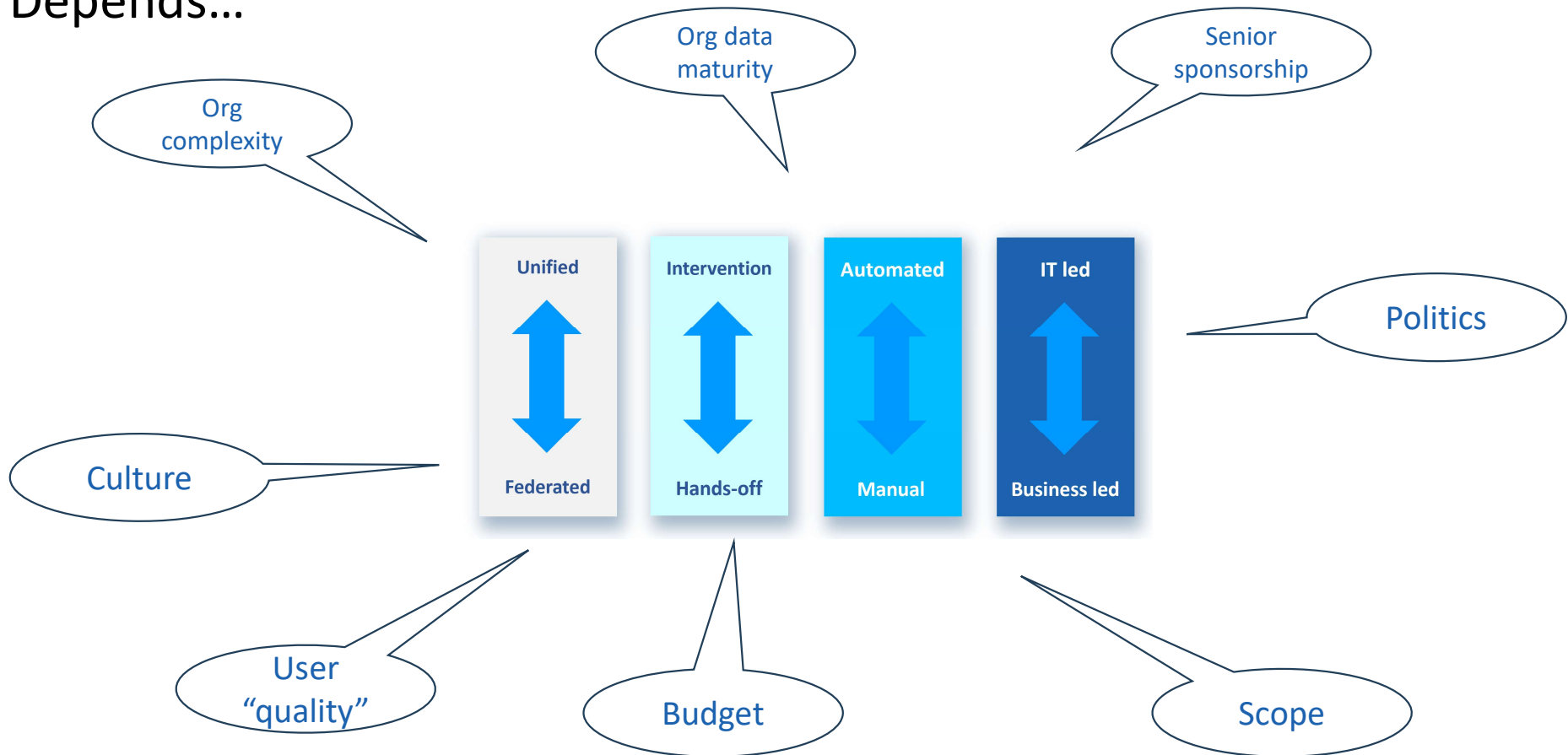
IT:

- Tech-savvy
- Relationship with business?
- Conflicts/Priorities

- (Of course, the best place is **Finance**)

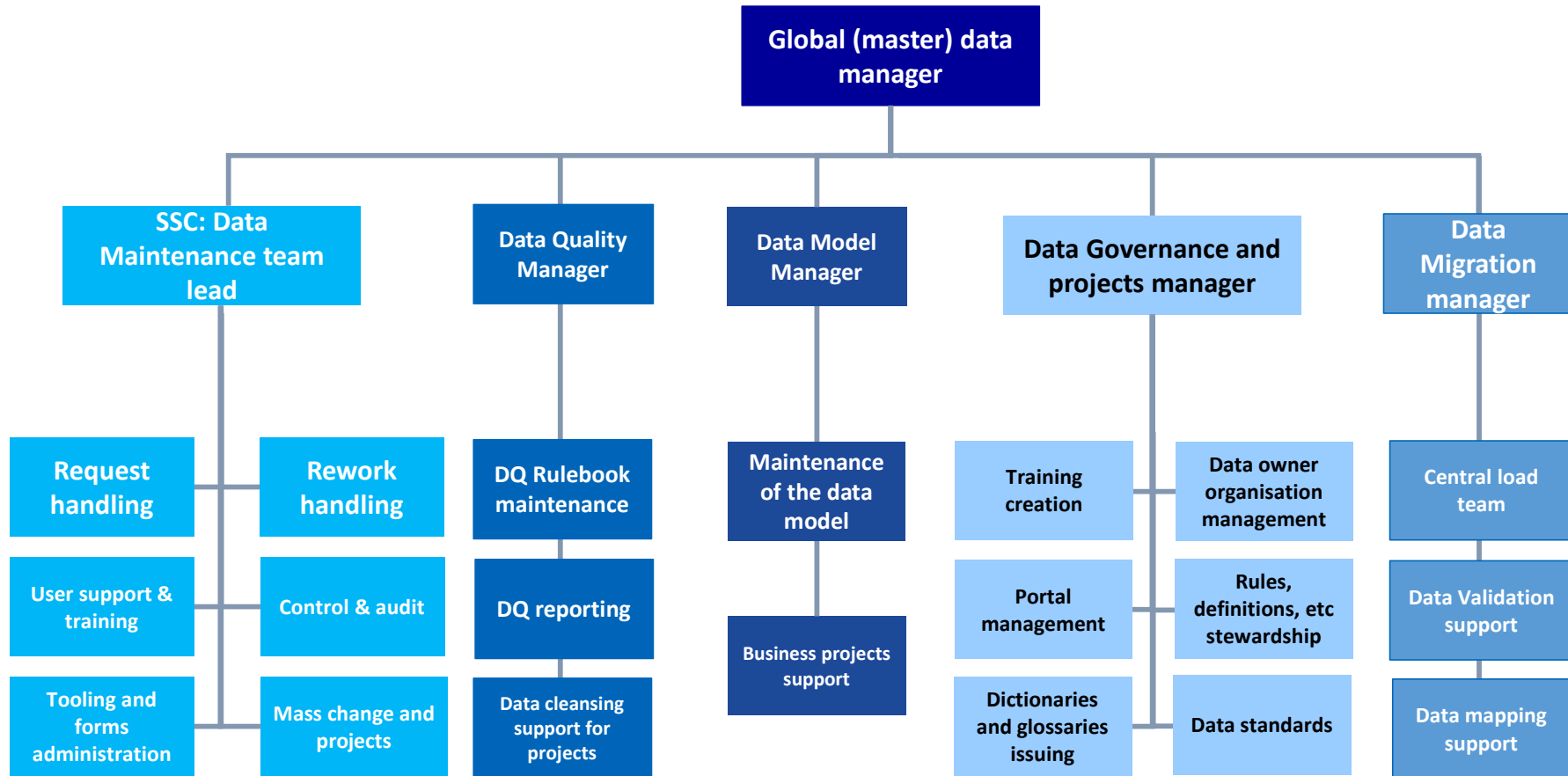
SO WHERE SHOULD MY TEAM BE ON THE “SLIDERS”?

- Depends...



TEAM STRUCTURE

THE FULL MDM GLOBAL TEAM



RECRUITMENT

WHO ARE THE “RIGHT” PEOPLE?

- You will NEVER staff up your team by hiring experienced master data people
- Why?
 1. You can't find them
 2. You can't afford them
- So, a strong message:

RECRUIT FOR ATTITUDE AND TRAIN FOR SKILLS!

- As long as you already have some experience in the team, do not (necessarily) seek MDM experience. Go for bright, enthusiastic people and train them into the job!

SOME TIPS

1 Sell yourself and the company hard! Promote it, be excited about it. Sell a career not a job.

3 Build relationships with your agent(s) - so they know what you want. Get them in to see what your people do.

5 Interview thoroughly! Prepare for it, don't take it lightly. It can cost you later



Clear and comprehensive role profiles - capturing everything

2

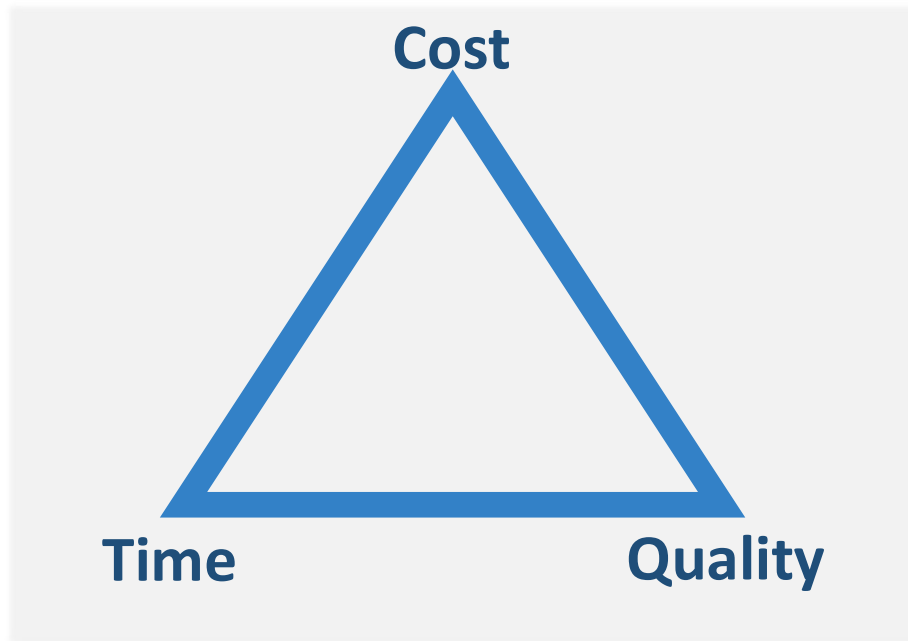
Recruit early - before you need the people (take a small hit on costs)

4

SLAs

IT IS A BALANCE

- Nothing new here... Any SLA is a balance:



HOW TO ACTUALLY CHOOSE

- Time is the key element and the trick to this is understand the maximum users' turnaround time **expectations** balanced against achievability by your team
- **How do you know their expectations? Ask them!**
- So, for a basic material request, supplied on the right form, correctly filled out what is a reasonable turnaround SLA?
 - **1 day** – too fast – you'll not hit that if there is any squeeze on resources
 - **7 days** – too long – your customers won't be happy
 - **2-3 days** – therefore about right
- You can have multiple SLAs for different objects, particularly complex ones like Finance and where multiple approvals have to be sought
- **Don't forget** – the SLA is just for time that the request is with you can **could** be being worked on by you. Hence, if a request gets sent back to the user with an error, that is **outside** SLA!

OPERATIONS

READINESS FACTORS OF A WINNING TEAM - 1

A

Do you have sufficient documentation?

All processes documented (e.g. for new starters)
What each field is and how people should fill it
Roles – who does what



B

Do you empower?

What are you doing with your day?
Empowerment = happy staff (+ easier to schedule)
Let them train, fix, etc., leaving you to do other stuff



C

Do you insist on multi-skilling?

Multiskilling means fewer gaps = fewer problems
Easier to flex/schedule
Backups for holidays/sick leave



D

Do you actively plan ahead and schedule?

Need to do this...
Cannot leave to luck
We went from 60% hit SLA to 99.5% by just doing this better



READINESS FACTORS OF A WINNING TEAM - 2

E

Have you sufficiently trained your team?

Have standard work instructions?
Know how to answer the phone properly?
Know how to deal with difficult customers?



F

Basic call centre stuff in place?

Have headsets so they can type and speak?
Have stock scripts for common situations?
Have standard email signatures?



G

Do you sufficiently track performance?

Evidence the performance
Ongoing discussions and reflections, PDP, etc.



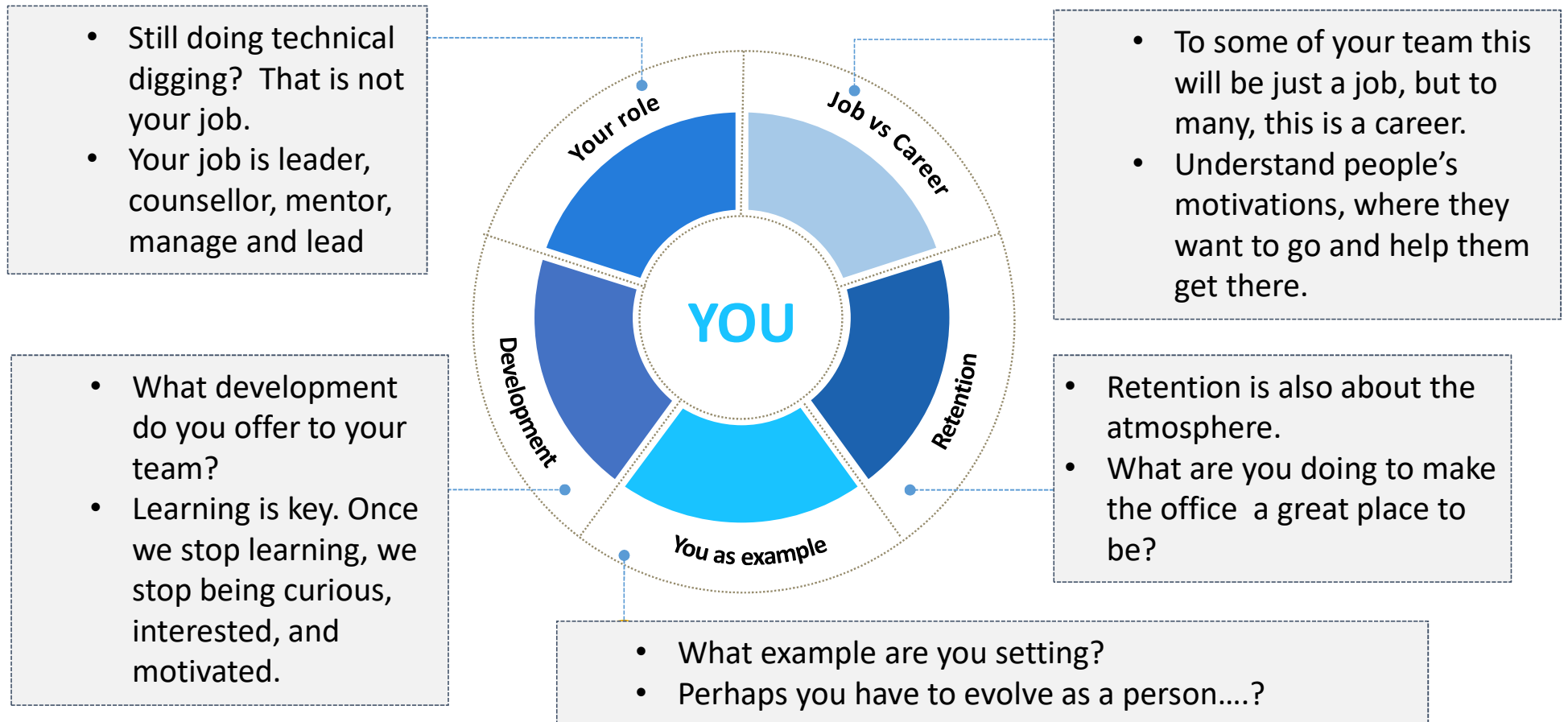
H

Do you have a ticketing tool? It is essential because::

You can load balance on the fly (dealing with ones going out of SLA urgently)
Recharge costs accurately
Identify customers not supplying good forms (via “reason codes”)



AND FINALLY HOW ARE YOU AS A LEADER?



TAKE AWAYS

KEY MESSAGES FROM TODAY

- The point of having a great team is to have better Data Quality.
- In Data Management, it's all about people! Not tools, not technology, not policies. People.
- The scope of your team's work can be assessed from many angles. Be clear - do the stuff you should be doing, not what others can't be bothered to do.
- You always have to make sure that it all fits your organization.
- Some things should be centrally managed, but it's also totally OK not to want to centralize everything.
- Focus on value-add activities – not data entry.
- Your team is your gold, find and keep the right people. “Recruit for attitude, train for skills!”
- Empower and invest, and multi-skill your team.
- Your SLA should be just acceptable to the business. (But usually it is 2 days.)
- Finally, get your manual processes and team right first and do the tooling later.

Thanks and goodbye



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TOP 100 2021

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