Knowledge Models that Solve the Data Management Puzzle: A Practical Guide

Part 2 of a two-part webinar series

May 18, 2022
Our 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)
- Former CEO GoldenSource (2002-2015)
- Former Executive for D&B Software and Oracle
- FinTech Innovation Lab – Executive Mentor (2011 – Present)
The purpose of the Requirements Model

Data & Analytics Management Requirements Model

- DCAM
- BCBS 239
- Privacy Regulations
- + your own
Welcome to our presenters

Mark McQueen
Managing Partner – US

Peter Ferguson
Principal Data Architect

Matt McQueen
Senior Consultant
Requirements Model

Mark McQueen
Managing Partner – US
Underlying requirements for managing your data

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

Map other models to the Processes only
(inherit the mapping to People, Data & Technology)
How it’s structured

Program, Operations and Governance

Roles & Responsibilities of individuals and DM governing bodies

Processes

People

Data

Technology

Program, Operations and Governance

Control Framework and Standard Data Models, Taxonomies & Metrics
An example: Data Remediation

- **Processes**: Data remediation is dependent on Data Quality measurement.
- **People**: DM function practitioners.
- **Data**: Data requirements are identified via the data catalog process.
- **Technology**: A system is needed to manage issues.
Adding DCAM & CDMC Frameworks
What are DCAM and CDMC?

DCAM® is the Data Management Capability Assessment Model

DCAM is a comprehensive data & analytics management framework

CDMC™ is the Cloud Data Management Capability Model

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

**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

**Requirements Model**
- Processes
- People
- Data
- Technology
### Our example: Data Remediation

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Scenario 1: Anna is starting a greenfield Data Management function

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

Anna, new CDAO

- New DM function
- DCAM chosen
- Considering Cloud
- No Solidatus license
Scenario 2: Bob’s done a DCAM Assessment and wants to improve his score

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

Bob, CDAO

- DM established
- DCAM Assessment
- Solidatus license
Scenario 3: Charlie is starting to use CDMC

Charlie, CDAO

- DM established
- DCAM Assessment
- CDMC Assessment
- Solidatus license

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
Adding Regulations
Aligning regulations: Privacy

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

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Privacy Thematic Areas</strong></td>
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<tr>
<td>• Data Subject Rights</td>
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<td>• Data Handling Rights</td>
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<td>• Governance &amp; Accountability</td>
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Scenario 4: Deeksha is checking compliance with Privacy regulations

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

Deeksha, CDAO

- Privacy regulations
- Multi-jurisdiction
- DCAM Assessment
- Solidatus license
Aligning regulations: Privacy – making it global

**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

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Solidatus Deep Dive

Matt McQueen
Senior Consultant
Ortecha
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
Solidatus Features & Use

Peter Ferguson
Principal Data Architect
### Solidatus Connectors: a selection from a longer list

<table>
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<tr>
<th>Connector</th>
<th>Description</th>
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<tr>
<td>alteryx (Alteryx)</td>
<td>Visualise your Alteryx workflows in Solidatus models with field-level lineage of inputs to outputs.</td>
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<td>Amazon Redshift</td>
<td>Automatically loads Amazon Redshift schemas into a Solidatus model.</td>
</tr>
<tr>
<td>Apache Hive</td>
<td>Loads Apache Hive schemas into a Solidatus model and also parses SQL statements and stored procedures.</td>
</tr>
<tr>
<td>Collibra</td>
<td>Load, visualise and update Collibra communities into Solidatus. Link domains and assets with lineage, update metadata, and load back into Collibra.</td>
</tr>
<tr>
<td>Erwin Data Modeller</td>
<td>Automatically load both logical and physical views of an Erwin data model, containing the standard data modelling object types.</td>
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<td>Google BigQuery</td>
<td>Automatically loads Google BigQuery schemas into a Solidatus model and also parses SQL statements and stored procedures.</td>
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<td>snowflake</td>
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<td>Sybase</td>
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<tr>
<td>Teradata</td>
<td>Loads Teradata schemas into a Solidatus model and also parses SQL statements and stored procedures.</td>
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<tr>
<td>MySQL</td>
<td>Automatically loads MySQL schemas into a Solidatus model.</td>
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<tr>
<td>Neo4j</td>
<td>Load nodes and relationships into a Solidatus model from a Neo4j database or Cypher query.</td>
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<tr>
<td>Oracle DB</td>
<td>Loads Oracle schemas into a Solidatus model and also parses SQL statements and stored procedures.</td>
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<tr>
<td>PostgreSQL</td>
<td>Automatically loads PostgreSQL schemas into a Solidatus model.</td>
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<tr>
<td>RDF</td>
<td>Visualise your RDF data files as a customisable Solidatus model.</td>
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<tr>
<td>Silwood Safyr</td>
<td>Loads data from CRM systems supported by Silwood Safyr, such as SAP, Salesforce, etc.</td>
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Q&A

Mike Meriton
Mark McQueen
Peter Ferguson
Matt McQueen

EDM Council
O rtecha
Solidatus
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Solidatus: Changing the way the world manages data

Trusted by many EDM Council member organizations and companies globally

Your data, by design
delivering a living digital data blueprint

Connected data governance
helping you understand and manage complex data relationships

Transforming and adding value
including data sharing, ESG, regulatory compliance, cloud migration...

Find out more
hello@solidatus.com
solidatus.com
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

Download a free license for your company’s internal use

For more information, contact Colin Gibson: cgibson@edmcouncil.org
Knowledge Models that Solve the Data Management Puzzle: A Practical Guide

Thank you!

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