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

Data & Analytics Management Requirements Model

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

Mark McQueen
Managing Partner – US

Philip Dutton
Co-CEO & Co-Founder

Matt McQueen
Senior Consultant
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 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

Program, Operations and Governance

Roles & Responsibilities of individuals and DM governing bodies

Control Framework and Standard Data Models, Taxonomies & Metrics

Program, Operations and Governance

Processes

People

Data

Technology
An example: Data Remediation

Data remediation is dependent on Data Quality measurement.

DM function practitioners

Data requirements are identified via the data catalog process.

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

**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

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Requirements Model
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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

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

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

- **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...

*Get in touch with Philip*

- [hello@solidatus.com](mailto:hello@solidatus.com)
- [www.solidatus.com](http://www.solidatus.com)

*97% would recommend – Gartner Peer Insights*
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
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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
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

Thank you!

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www.edmcouncil.org
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