

# Creating a Data Governance Structure

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*Formally define a data governance structure to ensure that scope, goals and roles are clear to all stakeholders*

At its best, data governance within b-to-b organizations is executed in a highly pragmatic manner. While emphasizing speed rather than perfection and avoiding highly constraining rules that mandate administrative burdens on end users, data governance councils should apply policies to prevent a data free-for-all that can harm business performance. In this issue of SiriusPerspectives, we provide details on five components that should be included in a data governance charter – the key document that defines an organization’s data governance structure.

## One: Mission Statement

The first step in implementing a strategy to improve data is the establishment of a governance structure with a clear charter. Assemble a cross-functional data governance council to ensure that all stakeholders’ interests are considered and that data will be governed holistically. Whether the organization is starting from scratch or already has some coordinated data activities in place, the council’s charter cements its purpose, provides guidance if scope creep occurs and defines how the council will operate. When developing the charter, start with the mission statement, as thinking through its content helps set parameters for other components.

- *Content.* At a minimum, construct a short, pithy statement that can be used as an elevator pitch to easily explain what the team does and how its work benefits the organization. Additionally, consider developing a longer narrative that explains the initial business problem sparking the council's creation, the ideal future state it seeks to attain and details about the types of issues it intends to address. While the mission statement should be aspirational, avoid overly broad or vague language; be as specific as possible so that stakeholders and other teams can clearly understand its charge.
- *Sample text.* The summary statement might read "The Acme Data Governance Council is the leadership body for the ingestion, maintenance and oversight of the information required to support marketing processes." The extended version might read "The Acme Data Governance Council is the leadership body for the ingestion, maintenance and oversight of the information required to support marketing processes. It will provide a framework for definitions, standards and policies of data governance aligned with the goals of the organization. The council will provide expert advice and support all aspects of data governance, including data quality, unification, access and measurement, and serve as a proponent of data governance to the senior leadership team."

## Two: Goals

To reinforce the specificity of the mission statement, include explicit objectives for the council. Although these objectives may be somewhat broad to start, the council should revisit them once the program is up and running – and then annually to ensure the data governance goals are unambiguous and aligned with the organization's goals.

- *Content.* When determining appropriate goals, consider metrics that reflect improvements to readiness, activities, output and, ultimately, impact on the business. Many data governance charters focus on readiness metrics (e.g. data quality and availability) but fail to enumerate the downstream effects that better-governed data will have on the organization. Use metrics from each category to create a cause-and-effect story that

demonstrates how the council's work will put the organization in a position to succeed and describes specific successes.

- *Sample metrics.* Readiness: percentage of data records meeting local privacy law compliance, percentage of target persona contact records containing required attributes. Activity: segmentation cycle time, percentage of leads disqualified because of bad contact data. Output: sender score, consumer satisfaction data. Impact: cost savings from reduced data remediation (apply fully burdened salaries to hours saved), regulatory risk mitigation.

## Three: Scope

Most organizations have increasingly high volumes of data in readily discoverable as well as hidden parts of the business around the world. Consequently, it can be difficult to determine where to draw governance boundary lines, but limiting the scope of governance is critical to making governance policies tangible.

- *Elements.* To clarify scope, consider the primary lens through which managing data makes the most sense for the organization. Is it on a system-by-system basis (e.g. marketing automation platform data vs. sales force automation [SFA] system data), or is it by function (e.g. marketing data vs. sales data)? Is it by type of data (e.g. contact data vs. account data) or by process (e.g. lead management data vs. content creation data)? Determine which lens should be the primary mode of governance, then identify which data sets within that dimension are in scope. Finally, list data that's out of scope to increase focus on the data that matters to the council.
- *Sample text.* "In scope of the council's governance responsibilities are contact and account data for prospects and current customers, along with their relevant interactions with the organization. This data includes but is not limited to marketing, sales and customer care data, and excludes billing and product portal data."

## Four: Roles and Responsibilities

If the organization is forming a data governance council for the first time, clearly defining roles and responsibilities may seem difficult, but this section cannot be skipped. Outline the roles broadly and refine them over time as specific resources are applied to projects and maintenance work.

- *Elements.* Effective governance councils include a mix of business and technical members, along with representation across functions, relevant business units and regions. Typical responsibilities range from administrative duties (e.g. fielding issues for the council's considerations, scribing at meetings) to supervisory duties (e.g. project managing major data initiatives) and executive duties (chairing the council). The chairperson – who may also be the executive sponsor – should serve as the point person for senior leadership communications and as the tie-breaking voter on any decisions the council can't resolve. Generally, the council should be limited to seven members so that the team can easily find availability for meetings and discussions can be productive. Organizations also may create two groups: the main governance council and a technical working team. The latter is often made up of data stewards and data analysts (some of whom may have membership overlap with the main governance council), who are instrumental in driving resolution on day-to-day issues and executing aspects of major initiatives set forth by the council.
- *Sample text.* "The data governance council will comprise representatives from the following areas: field marketing (U.S., Europe); inside sales; marketing operations; sales operations; and compliance. The director of marketing operations will serve as the council's chair and liaison to senior leadership. A data governance operations team will comprise two data stewards in marketing operations, two data stewards in sales operations, a representative from global IT, and one business analyst from marketing and sales each."

## Five: Procedures and Communications

Document the processes that the council will follow and its methods of communication. This section does not describe actual

governance policies, but rather the internal processes the governance council will follow.

- *Elements.* Indicate how frequently the council will meet, its procedures for capturing and hearing new issues, its decisionmaking process, and whether a quorum or key council roles are required for voting. Governance councils also should have a defined process for communication. Determine how and when meeting agendas are set and distributed; how and when minutes are shared with council members; and how and when major decisions, policies, roadmap updates and project status reports are communicated with other interested and affected teams.
- *Sample text.* "The governance council will field requests via cases submitted through the SFA system, and with the following service-level agreements: level 1 issues – 48 hours; level 2 issues – 1 week; custom issues – as appropriate. The council will meet biweekly with the following agenda: project status updates, operations team updates, new policy change requests and any other business. Decisions require representation from sales and marketing, and minutes will be published within two days of the meeting. The chairperson will provide progress reports at each quarterly business review."

## The Sirius Decision

Organizations might be reluctant to set up a data governance council for several reasons. Individual team members may feel as if they don't own the whole problem, or with their already busy schedules they may lack motivation to run point on another initiative. Some organizations hesitate to get started because they feel it will take too long to set up the council and get moving. In fact, data governance councils and their charter can be pulled together in a matter of weeks, especially if the organization already has some of the pieces in place and needs only to formalize and document the approach. Regardless of the starting point, prioritize speed over perfection when setting up the council to set the tone for the council's work and facilitate the transition into execution.

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