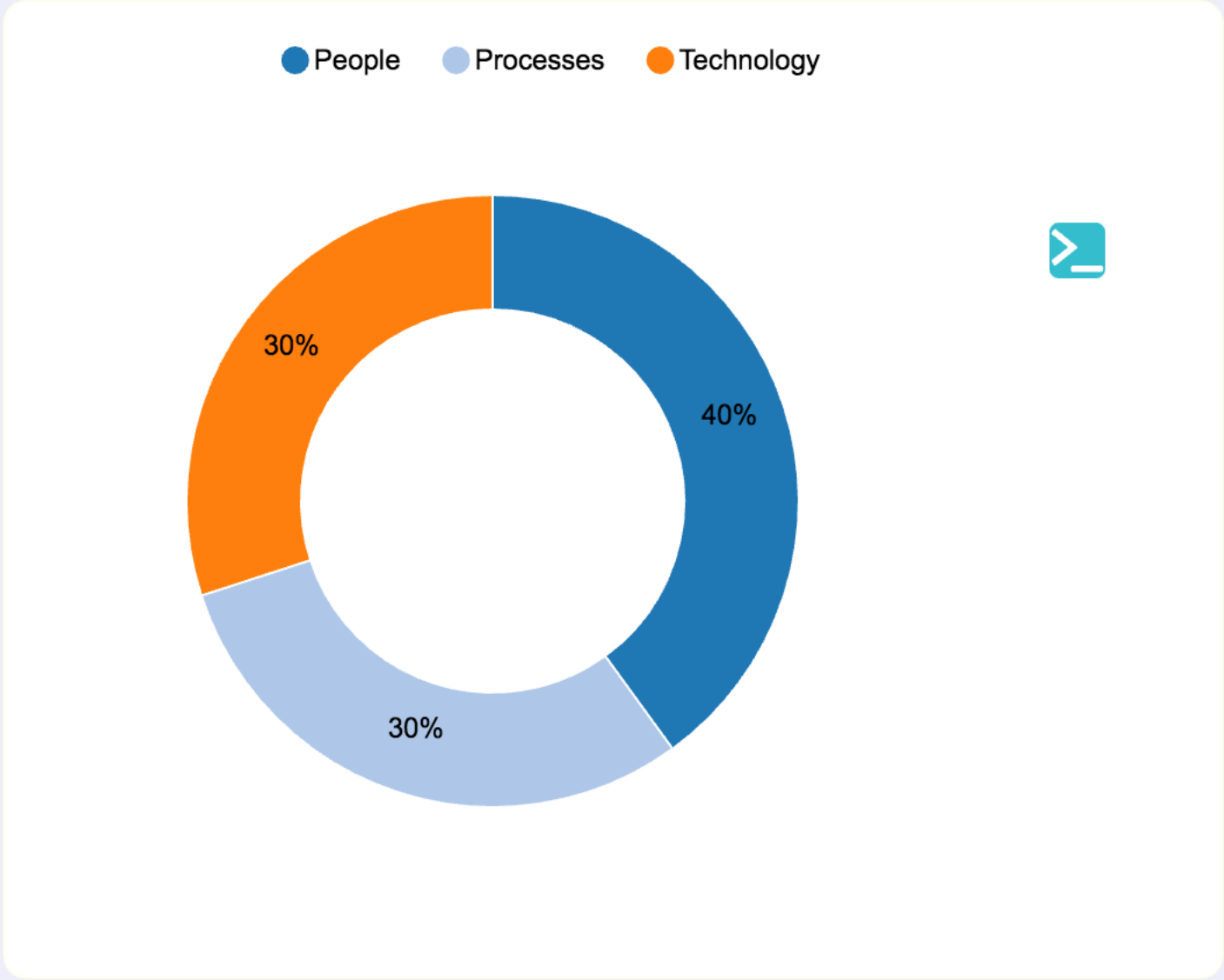




Data Governance and Salesforce





What is Data Governance?

Data is the important **asset** of the organization, which is critical to its success.

Data Governance is the formal orchestration of :

People

Processes

Technology

to enable the organization to leverage data as an enterprise asset.

Provides models to describe:

Who can take what actions with what information when, under what circumstances, using what methods

Covers:

Creation, valuation, storage, use, archival and deletion of the data and information

Helps to:

Satisfy regulatory requirements :: Ensure business continuity :: Drive precise search and retrieval





Goals of Data Governance

Define, Approve and Communicate

Data Strategies
Data Policies (<i>describes rules controlling integrity, security, quality and usage of the data</i>)
Data Standards (<i>how to do. Example: Naming-standards, modeling-standards, data-architecture-standards</i>)
Data Architecture (<i>data modeling, data design, and data delivery architecture</i>)
Data Procedures
Data Metrics

Track and Enforce conformance to

Data Policies, Standards, Architecture and Procedures
Manage and solve data-related issues (like quality-issue, naming-issue, security-issue)
Promote the value of the data assets



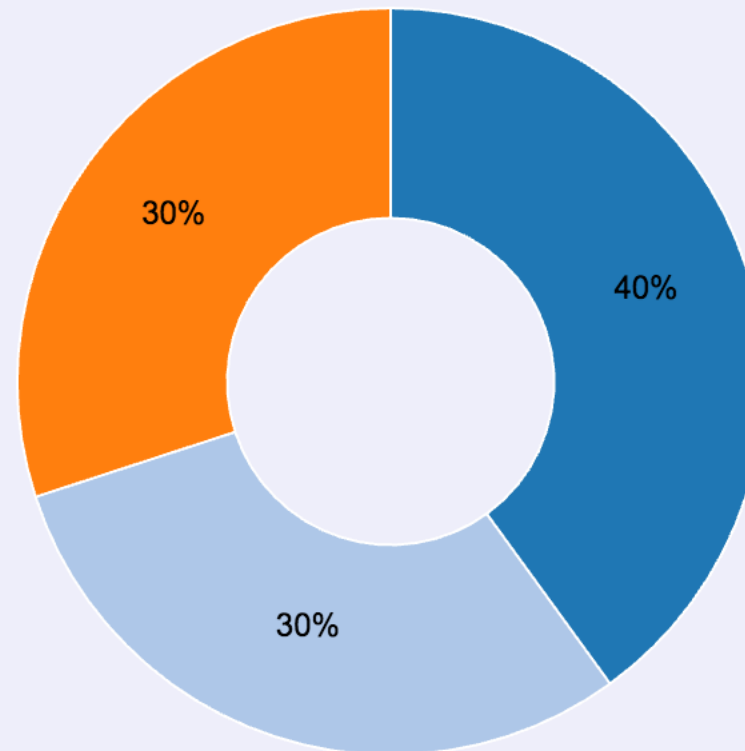
Data and Information

Data	Information
Building block	Information gives meaning and context to Data
Raw	Data gets processed and gets context to become Information



Key Components

● People ● Processes ● Technology





Technology components

Backup - recoverable

If the data is deleted by accident, if that impacts the business, it should be backed-up.
Backed-up data should be available for restore when and where it is needed

Archiving - accessible

Capturing, indexing all kinds of data (structured and unstructured) in the enterprise and make it searchable.
Readily available when needed.

eDiscovery - defensible

Process of gathering electronically stored information need for litigation or legal investigations.
Proving the complete data is produced and not tampered with is essential





Drivers, Deliverables and Metrics

Drivers:

- Privacy
- Security
- Compliance

Deliverables:

- Data quality improvement
- Easier access to data
- Auditable security
- Assess risk and define controls to manage risk

Metrics:

- Data value
- Data management cost
- Achievement of objectives
- Number of decisions made
- Steward representation and coverage
- Data professional headcount
- Data management process maturity

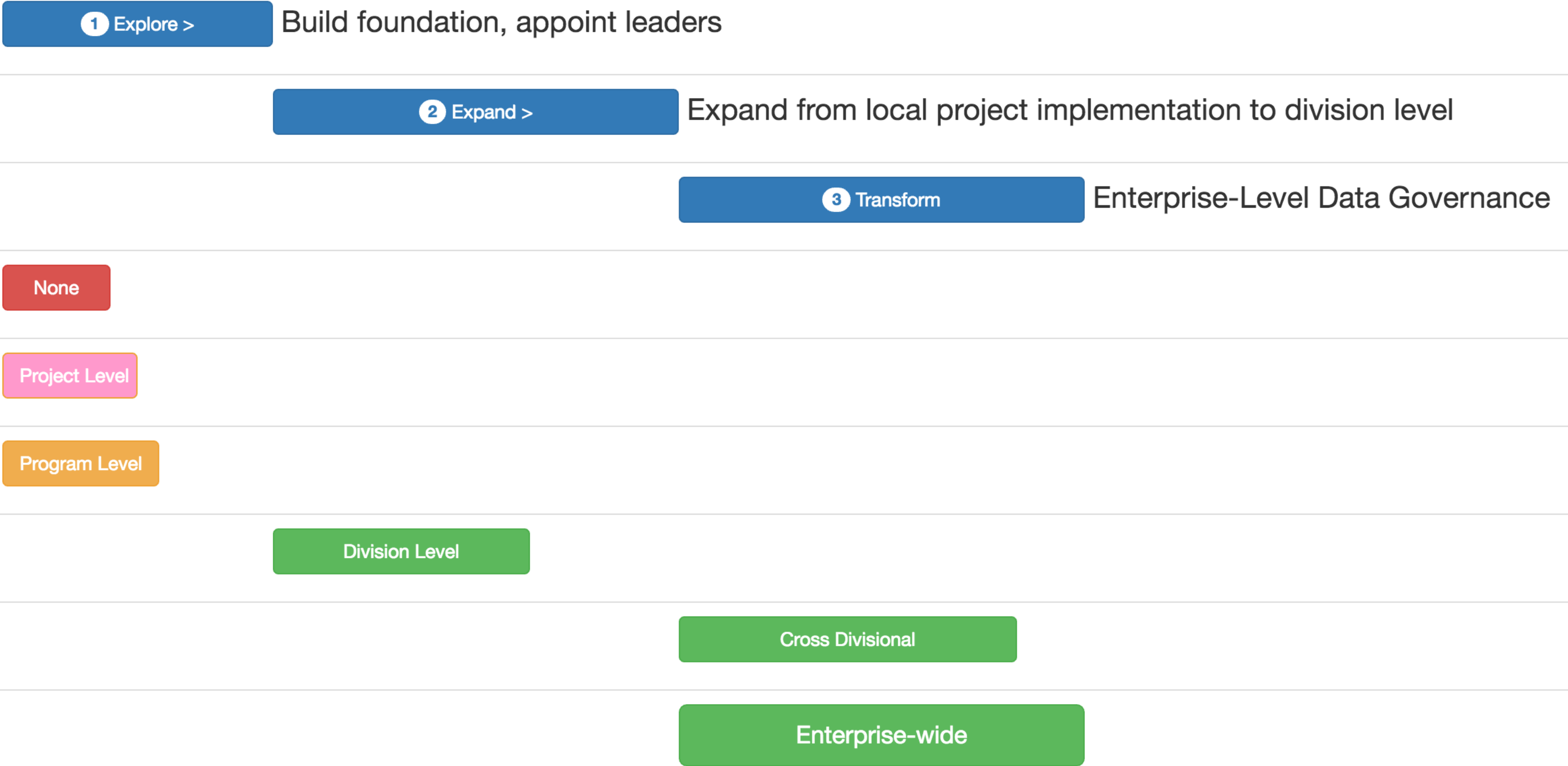


Maturity Model

None	Data is not an asset; by-product of applications
Initial	Very limited influence on business processes
Managed	Loosely defined processes; Ownership and stewardship at line-of-businesses
Standardized	Business engaged, common-information-in-place, cross-functional team formed. Data stewards appointed with clear responsibilities
Advanced	Institutionalized and viewed as critical asset to business across all functions
Optimized	Core business process and decisions are made with quantifiable benefit-cost-risk analysis Adpatable to changes



Adoption Model





Data Stewardship

Monitor the data is being collected and monitored

Maintain Standards and response to the questions

Resolve Conflicts, escalate as needed

Monitor entire pipeline

Empower users in helping fixing data quality issues (crowdsourcing...)

Focus on execution and maintenance:
Maintain Salesforce reference dataset
Right Labels
Picklists
Objects and records

Check early and often
Balance value vs. risk
Have end-to-end visibility

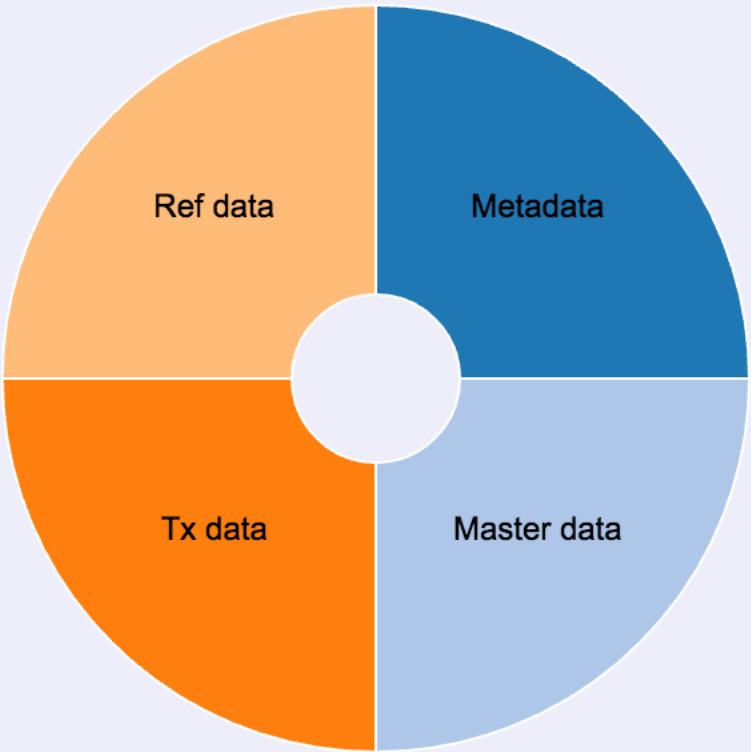




Types of data

Type	Examples
Metadata	Configurations, Login history, data models...
Master data	Customers, Partners, Products...
Reference data	Currency Codes, Industry Classifications (Taxonomy)...
Transactional data	Orders, Contracts, Fulfillments...

Metadata Master data Tx data Ref data





Best Practices



Start Small with Holistic approach and end-goal:

Make enterprise data is accessible, protected and defensible



Obtain Executive Sponsorship

Use interdisciplinary approach



Define data stewardship as early as possible



Know about obstacles and workout methods to overcome them



Establish metrics to measure success



Measure and report progress



Provide incentives/awards to encourage participation



Review the policies regularly to cover regulatory needs and new data types

Explore new technologies to support data governance.





SFDC Best Practices

Security

Leverage SFDC Field-Level-Security (FLS) to restrict access to data validation fields: approval status, record condition. Hide fields to enhance usability.

Create custom profile and manage field level access and then create permission-sets.

Hide/Restrict certain fields that are strategic in nature.

Validation Rules

Block the user from entering misaligned via using validation rules of SFDC
Example: If record-type is Prospect then State and City are required fields

Types and Page-Layouts

Use record-types to segment an object based on status to ensure only relevant information is presented based on single state in the process.
Examples: record-type by status , record-type stage..





SFDC Best Practices (contd.)

Dependent Picklists Fields

Leverage SFDC Dependent Picklist feature to provide right choices to the users.

Approval Workflows

Prior to record-lock or passover to integration, leverage approval workflow as final-gate
This ensures that test or incorrect data do not get migrated.

System/User Fields

Save standard fields for native syncs and leverage custom fields for variable data.

Add Data Quality Score

Make use of SFDC formula fields feature.
Establish a basic point scoring formula to provide data quality ratings on the record.





SFDC Best Practices (contd.2)

Kill the Suspects

Most systems has 2x data they need. Clean the house:

Isolate suspects

Flag for elimination with color-coding

Hide with FLS

Wait

Backup and delete

De-dupe

Follow a consistent method/process during de-duping

Duplicates are easy to remove and very expensive to restore back if you have made a mistake.

Order:

1. Accounts vs Accounts
2. Contacts within Accounts
3. Contacts between Accounts
4. Leads
5. Leads to Contacts

Search before creation



Cost of doing nothing!

\$1

to verify a record a it is entered.

\$10

to cleanse and de-dupe it after entry

\$100

if nothing is done, as the ramification of the mistakes are felt over and over again

