



Deelnemerslijst  
Data Governance Sprint  
25 en 26 november

BEDRIJF	NAAM DEELNEMER		FUNCTIE
CB	Marcel	Brouwer	data architect
CB	Martijn	Matena	other
Nationale Postcode Loterij	Agniet	de Vries	information-analyst
Riviq B.V.	Pim	Wennekes	other
St Antonius Ziekenhuis	R	Fetter	information-manager
St Antonius Ziekenhuis	Tessa	de Grunt	it-manager
The Future Group	Michael	Tan	bi-specialist



**Evaluatieformulier  
Data Governance Sprint  
25 en 26 november 2025**

Naam: \_\_\_\_\_ Bedrijf: \_\_\_\_\_

Wat is in een cijfer uitgedrukt uw beoordeling van (s.v.p. aankruisen):

1. Dit seminar overall: 

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
<input type="radio"/>									

2. De presentatie van de spreker: 

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
<input type="radio"/>									
- Inhoudelijk :									
<input type="radio"/>									
- Presentatie:									
<input type="radio"/>									

3. Voldeed het programma aan uw **verwachtingen**?  **Ja**  **Gedeeltelijk**  **Nee, want**

\_\_\_\_\_

4. Zou u dit seminar aanbevelen bij collega's of binnen uw netwerk?  **Ja**  **Nee, want**

\_\_\_\_\_

5. Welke onderwerpen heeft u gemist of vond u onderbelicht?

\_\_\_\_\_

6. Welke onderwerpen vond u overbodig of kregen te veel aandacht?

\_\_\_\_\_

7. Welke overige op- of aanmerkingen of suggesties heeft u nog?

\_\_\_\_\_

8. Organisatie en accommodatie. Hoe waardeert u de:

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
Organisatie van de dag	<input type="radio"/>									
Kwaliteit zaal, beeld en geluid	<input type="radio"/>									
Bereikbaarheid / ligging	<input type="radio"/>									

9. Hoe bent u hier gekomen?  **Auto**  **Openbaar Vervoer**  **Anders, \_\_\_\_\_**

10. Zou u een korte aanbeveling willen schrijven voor dit event, dat wij als testimonial kunnen tonen op onze website? Zo ja, schrijf deze dan hieronder:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Naam: \_\_\_\_\_

Bedrijf: \_\_\_\_\_ Functie: \_\_\_\_\_



# Welcome Adept Events

## WHO WE ARE

**AdeptEvents**

**DW&BI SUMMIT**

**BI-Platform.**

**RELEASE.**

**Werner Schoots**

Founder Adept Events



# BI-Platform.

- Launched in 2008 as online spin-off from Database Magazine (DB/M)
- Topics: Business Intelligence, Data Warehousing, Analytics, Data Management

*News*

*Job board*

*Selected Whitepapers*

*Events*

*Articles*

*Blogs*

*Video interviews*

*Cases*

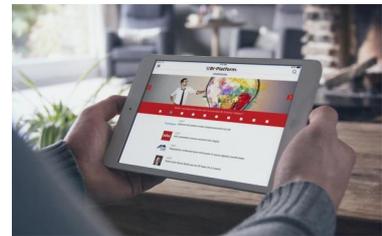
- We welcome your input: [redactie@biplatform.nl](mailto:redactie@biplatform.nl)

  [www.biplatform.nl](http://www.biplatform.nl) & weekly newsletter

  @BIplatform on & YouTube

  Download the BI-Platform App

 Join our LinkedIn Discussion Group



## RELEASE

- Launched in 1996 as Software Development spin-off from Database Magazine
- Topics: Software Engineering – Analysis, Design, Development, Testing and Deployment

*News*

*Job board*

*Selected Whitepapers*

*Events*

*Articles*

*Blogs*

*Video interviews*

*Cases*

- We welcome your input: [redactie@release.nl](mailto:redactie@release.nl)

  [www.release.nl](http://www.release.nl) & weekly newsletter

  @Release\_nl on Twitter & YouTube

  Download the Release App

 Join our LinkedIn Discussion Group



# SEMINARS

*All seminars and workshops are organised twice a year*

Alec Sharp	Business-oriented Data Modelling Masterclass Working with Business Processes Masterclass Concept Modelling for Business Analysts The Data-Process Connection (virtual half day session)
Panos Alexopoulos	Knowledge Graphs – pragmatic approach and best practices
Rick van der Lans	Ontwerpen van een Nieuwe Data Architectuur
Mathias Vercauteren	Data Governance Sprint
Nigel Turner	A Data Strategy for Becoming Data Driven Tackling Data Quality Problems (virtual half day session)
Chris Bradley / Winfried Etzel	Data Management Fundamentals
Lawrence Corr	Agile Data Warehouse Design & Dimensional Modeling
Christian Gijssels	Generatieve-AI in Business Analyse Cursus Sparx Enterprise Architect 16
<i>Multiple speakers</i>	<i>Data Warehousing &amp; BI Summit – Yearly conference in March/April</i>

# IN-HOUSE

**All seminars and workshops can be organized in-company.**  
With local speakers and international speakers!



Please contact Werner Schoots

☎ +31 (0)172 742680

✉ [seminars@adeptevents.nl](mailto:seminars@adeptevents.nl)



# DAIG

DATA & AI GOVERNANCE

## PARTNERS

# Data Governance Sprint™

Establish Data Governance in Weeks instead of Months

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## Who is **MATHIAS VERCAUTEREN**

### Consulting & Advisory Services

- DAMA –DMBOK v3 (*Project Manager*)
- UZA (*Hospital*)
- MLOZ (*Healthcare Insurance*)
- Monument Group (*Insurance*)
- De Lijn (*Logistics*)
- MPET (*Logistics*)
- Securex (*Professional Services*)
- Federal Insurance (*Insurance*)
- Flemish Government (*Governmental Institution*)
- Belfius (*Financial Services*)
- Barry Callebaut (*Manufacturing*)
- Carrefour (*Retail*)
- Hilti (*Manufacturing*)

### Research

- President of Data Governance Research Institute (*2024, founding phase*)
- PhD in Data Governance (*AMS, 2024 - 2028*)
- Book "Data Governance Sprints" (*Technics Publication, est. Jan 2025*)
- Data Governance Digest (*LinkedIn newsletter*)



- PhD in Data Governance
- MSc in Business Economics
- BSc in Sociology

(AMS, 2024 - 2028)  
(2012, Ghent University)  
(2009, Ghent University)



### Educational Services

- De Volksbank (*Data Strategy – 1,5 day*)
- City of Antwerp (*MDM – 1 day*)
- Bol.com (*DAMA-DMBOK – 1 day*)
- De Voorkepen (*Pragmatic DG for SMEs – 2 days*)
- Profel Group (*MDM – 3 days*)
- De Nederlandsche Bank (*DAMA-DMBOK – 2 days*)
- ISS Netherlands (*MDM – 2 days*)
- Vlerick – MBA program (*Data Governance – Guest lecture*)
- ...

#### Speaking Engagements:

- DGIQ/EDW 2025 (*Anaheim, 2025*)
- Data and AI Conference (*London, 2025*)
- DMZ 2025 (*Phoenix, 2025*)
- DGIQ 2024 East (*Washington DC, 2024*)
- Data and AI Conference (*London, 2024*)
- DGIQ 2024 West (*San Diego, 2024*)
- Enterprise Data World (*Orlando, 2024*)
- DG & MDM Conference (*London, 2023*)
- DGIQ 2023 East (*Washington DC, 2023*)
- AI 4 Business Summit (*Brussels, 2019*)



# Training **AGENDA**

We'll cover the following eight areas of training

**Introduction**

- 1 Data is an asset
- 2 Data Governance fails!
- 3 Workshops are better
- 4 Anatomy of a workshop
- 5 DG Sprint™ methodology

**Week 1 – 6+**

- 1 Monday
- 2 Tuesday
- 3 Wednesday
- 4 Thursday
- 5 Friday

**Key Success Factors**

- 1 6 Laws of Facilitation
- 2 Setting Yourself Up for Success!
- 3 Giving Instructions
- 4 Danger of Troublemakers
- 5 Remote Workshops

[Back to Agenda](#)

## Introduction

- 1 **Data is an asset**
- 2 **Data Governance Fails!**
- 3 **Workshops are better**
- 4 **Anatomy of a workshop**
- 5 **DG Sprint™ methodology**

# Data is a strategic ASSET

## BlueCross HealthCare



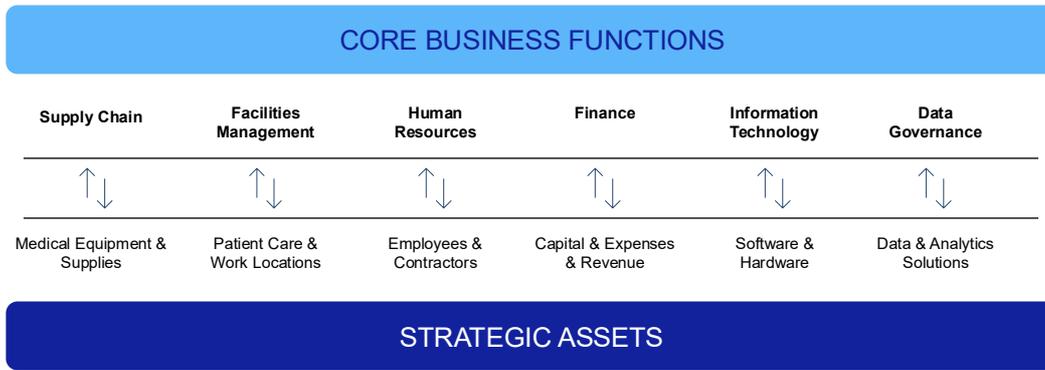
- **Vision Statement:** "To be a beacon of excellence in healthcare, providing qualitative, innovative, and patient-centered services that promote wellness and improve the quality of life for the communities we serve."
- **Company Objectives:**
  - Deliver Exceptional Patient Care
  - Foster a Culture of Continuous Improvement
  - Expand Community Health Initiatives



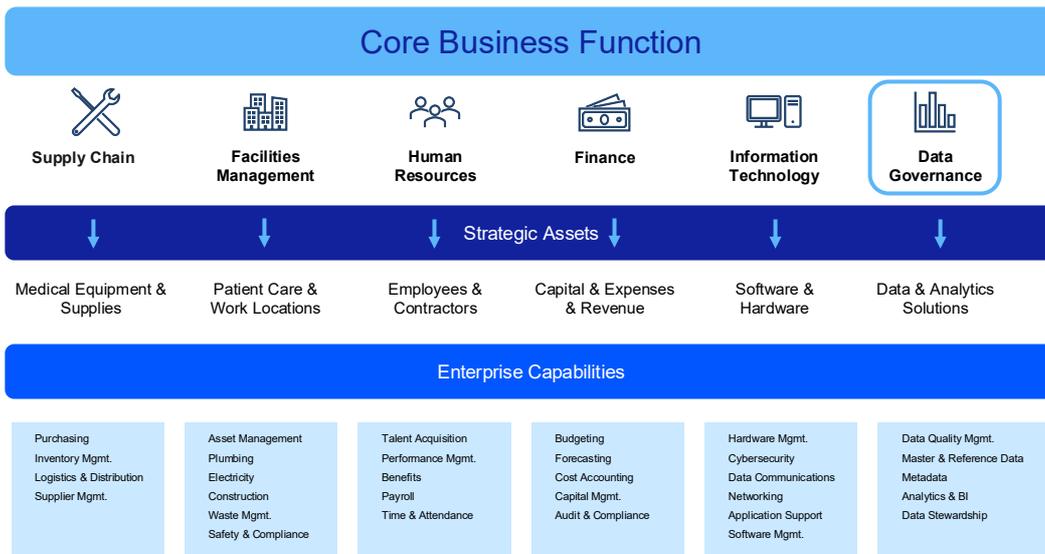
# Data is a strategic ASSET



## Data Governance is **MANAGING** data as an **ASSET**



## Data Governance is **MANAGING** data as an **ASSET**



# Introduction

- 1

**Data is an asset**
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- 3

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- 4

**Anatomy of a workshop**
- 5

**DG Sprint™ methodology**

cdo

CHIEF DATA OFFICER  
MAGAZINE

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1 Explores Data and AI Innovation at Scale
First SoCal Leadership Summit Showcases AI's Role in Business Transformation
Actionable Takeaways from

Opinion & Analysis

## Data Governance Is Failing – Here's Why



Representative photo by Claudio Schwarz on Unsplash

Author:

Thomas C. Redman, Anne Marie Smith, John Ladley, Mathias Vercauteren, Malcolm Hawker, Aaron Wilkerson

Published on: Jan 22, 2025, 4:00 pm

<https://www.cdomagazine.tech/opinion-analysis/data-governance-is-failing-heres-why>

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## MOST Data Governance programs fail!

- **People side** versus Technology side!
- Growing complexity of **modern data organizations**.
- Where's **the value**?
- And what about **the communication**?
- **Disconnect** between **speed** of business and speed of a data governance program.
- **Traditional** Data Governance strategies fail...time and time again!

---

## MOST Data Governance programs fail!

*The gap between rapid business movement and slow data governance implementation, plus the failure of traditional strategies, highlights the need for a more **flexible and pragmatic approach**.*

# Introduction

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## How effective are your MEETINGS?



Endless debate cycles



Biased meetings & wrong priorities



Frustrated teams & loss of momentum



Communication barriers

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## Why workshops are **BETTER** than meetings?

- Grab pen and paper
- I flash some words on the screen
- Take 20 seconds to write down every word you remember
- I'll show the words again, how many did you remember?

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Cat      Fish      Tree      Flower      **Tape**

Key      *Door*      Head      **King**

Hammer      **Ball**      Square

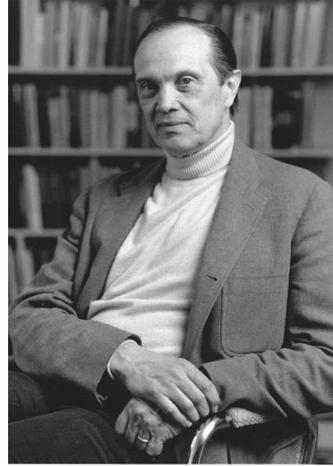
Apple      House      Box      Shoe

*Milk*      Ball

## The magical number 7 (plus or minus 2)

Some limits on our capacity for processing information.

*So how does this play out in a meeting?*



George Miller

## A **TYPICAL** meeting

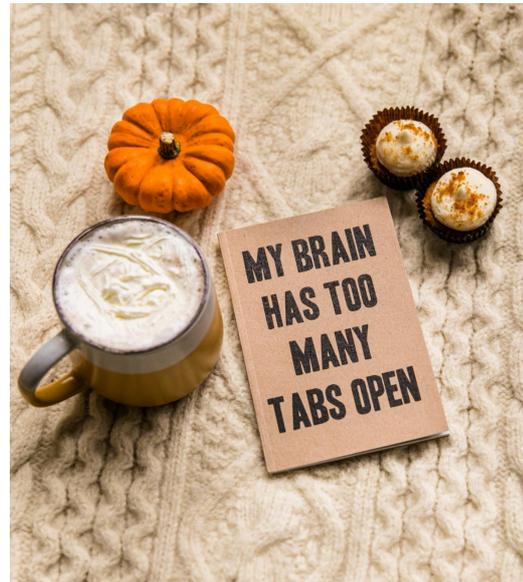


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## The **BRAIN** stuff

In meetings, you have a ton of information being produced, but people don't actually remember. Our brains struggle to process this data avalanche, especially when cognitive biases like **recency bias** and **primacy bias** come into play.

**Our brains are just not made to process the amount of data that happens in a meeting.**



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A workshop is a **POWERHOUSE!**

*Workshops allow you to **visualize** meetings and make **decisions** based on the data that is visualized around you.*

## The importance of a workshop **FACILITATOR**

As a workshop facilitator (aka *The Workshopper*), you help groups of people or teams **make decisions** and **solve problems**.

From crafting a vision for data governance to overcoming implementation challenges, workshops can play a crucial role in the development and deployment of effective data governance within a company.



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workshop**

5

**DG Sprint™  
methodology**

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## The **ANATOMY** of a proper workshop



Principles



Framework



Mechanics



Exercises

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## The **ANATOMY** of a proper workshop



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## PRINCIPLES

Every great workshop is built on a solid set of guiding principles. Think of these principles as the **fundamental rules** that shape the success of any workshop you run.

These rules are not something you need to actively think about. They are so basic and straightforward that they naturally guide the flow of the workshop.

Leaving out any of these crucial elements usually leads to a less effective workshop. So, make sure you keep them in mind!



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## 4 Principles

1. Discussions are Sequenced
2. Discussions are Visualized
3. We Work Alone, Together
4. There's Always a Decision

---

## 4 Principles

### 1. Discussions are Sequenced

### 2. Discussions are Visualized

### 3. We Work Alone, Together

### 4. There's Always a Decision

The Workshopper decides who should speak, when they should speak and for how long.

The Workshopper also makes sure the speaker stays on-topic and is giving information relevant to the point in the workshop.

This, for example, helps us avoid someone giving ideas and solutions while we're still trying to define the challenge.

---

## 4 Principles

### 1. Discussions are Sequenced

### 2. Discussions are Visualized

### 3. We Work Alone, Together

### 4. There's Always a Decision

The Workshopper ensures that all relevant data and topics are easily readable and scannable at all points during the workshop.

It's extremely difficult for a group to keep more than a few pieces of data in their heads at once.

The Workshopper removes this burden by visualizing the conversations in a standardized way.

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## 4 Principles

1. Discussions are Sequenced
2. Discussions are Visualized
3. We Work Alone, Together
4. There's Always a Decision

Participants in our workshops are working towards the same goal, always collaborating together in real-time, but they rarely communicate or share ideas freely.

Ideas and conversation points are created individually and then anonymized to reduce idea contamination, group think, and group biases.

This allows even the most introverted group members to present ideas and topics they might usually not get a chance to articulate.

---

## 4 Principles

1. Discussions are Sequenced
2. Discussions are Visualized
3. We Work Alone, Together
4. There's Always a Decision

We don't end any workshop without a decision. Workshops must end with clear next steps and clear responsibilities assigned.

It's because of this that we don't start any workshop without ensuring that one of the participants takes the role of **the "decider"**.

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## The **ANATOMY** of a proper workshop



Principles



Framework



Mechanics



Exercises

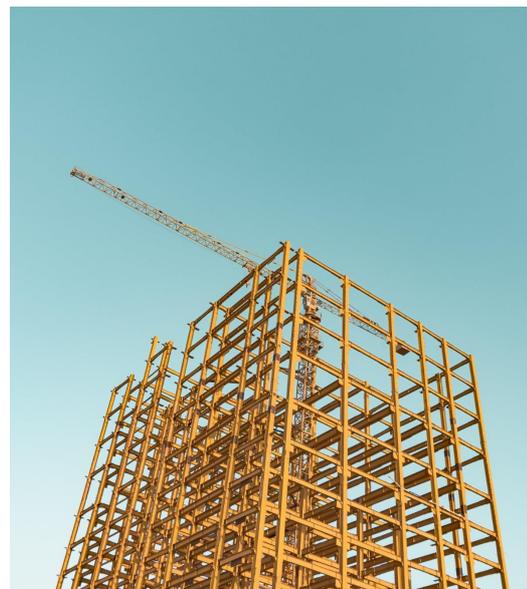
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## FRAMEWORK

The backbone of any workshop is its structural framework, which provides the necessary **logic and organization**.

One highly recommended framework is the "**4C's**". It offers a sturdy structure for any workshop.

This framework enables a seamless integration of specific exercises into the workshop's agenda, ensuring a coherent flow.



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## 4 C's framework

1. Collect
2. Choose
3. Create
4. Commit

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## 4 C's framework

1. Collect
2. Choose
3. Create
4. Commit

Every workshop needs to start with a phase of information collection. This can be where a team comes together to collect challenges, ideas, data, inspiration, or anything that could come up in an open conversation.

The data collected then needs to be visualized for all participants to see.

---

## 4 C's framework

1. Collect

2. Choose

3. Create

4. Commit

Once enough content and data has been collected, it's time to Choose what to focus on and what to ignore. It's important that the entire team really knows exactly what they're working on so they don't create solutions for the wrong or irrelevant challenges.

The Choose phase of the workshop gives clear direction and acts as a foundation for everything else.

---

## 4 C's framework

1. Collect

2. Choose

3. Create

4. Commit

Once the team has collected and shared the relevant information and everybody's on the same page with the "scope of work", it's time for team members to Create solutions.

Solutions don't need to be final, or even well thought-out – at this point it's more about creating multiple potential solutions.

---

## 4 C's framework

1. Collect
2. Choose
3. Create
4. Commit

A workshop is useless without actionable takeaways, unless the goal was purely about inspiring the team.

In the commit phase, the Workshopper helps participants to commit to a small number of solutions that will be executed on and discard/de-prioritize others, while also helping the team define the next steps.

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## The **ANATOMY** of a proper workshop



Principles



Framework



Mechanics



Exercises

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## MECHANICS

The guiding principles are like the unconscious, instinctive parts of workshop planning and execution, while the operational mechanics zoom in on the **actual execution** of the workshop itself.

You can see these mechanics at play in almost every workshop activity, shaping what happens behind the scenes.



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## 3 mechanics

1. Standardized, Anonymized Note Taking
2. Multi-Layered Voting
3. Timeboxing

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### 3 mechanics

1. Standardized, Anonymized Note Taking
2. Multi-Layered Voting
3. Timeboxing



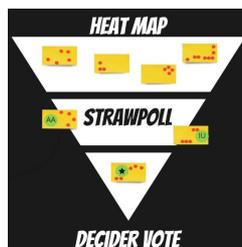
Rather than everyone in the workshop taking their own notes with their own systems on their own mediums (a.k.a notebooks, laptops etc), everyone in the workshop uses the same note-taking **medium** (Sticky-Notes or digital alternatives) and the same note-taking **structure** (one 'idea' or point per Sticky-Note).

This allows the conversations to be visualized in a standardized way that everyone can understand and refer back to.

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### 3 mechanics

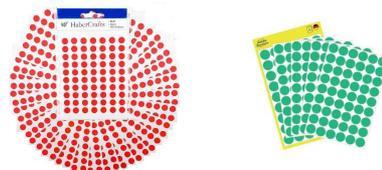
1. Standardized, Anonymized Note Taking
2. Multi-Layered Voting
3. Timeboxing



When decisions need to be made, we use a voting system that can be customized based on the level of commitment needed.

**There are 3 layers in total:**

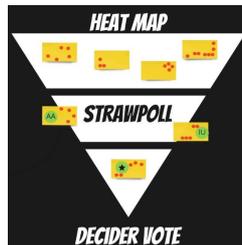
- A. Anonymous Heatmap Voting
- B. Semi-Anonymous Strawpoll Voting
- C. Decider Vote



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### 3 mechanics

1. Standardized, Anonymized Note Taking
2. Multi-Layered Voting
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#### A. Anonymous Heatmap Voting

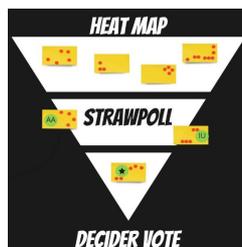
Participants get a large amount of voting dots and register their interest on ideas, challenges or topics.

This is usually a non-committal voting type which is only used to guide the conversation and show where the interest in the group lies.

---

### 3 mechanics

1. Standardized, Anonymized Note Taking
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#### B. Semi-Anonymous Strawpoll Voting

Participants generally get one voting dot and with this dot they need to decide on one solution or challenge that they want the group to focus on.

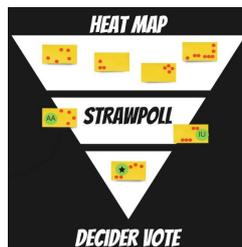
This voting exercise begins anonymously as the participant gets time to think about their selection. They then write their name on the vote and everyone in the group votes at the same time.

This allows the group to see who voted for what, but not to influence the votes.

---

### 3 mechanics

1. Standardized, Anonymized Note Taking
2. Multi-Layered Voting
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#### C. Decider Vote

This is the final commitment of the workshop where the assigned decider of the group must make a final decision (or multiple final decisions depending on the workshop).

This decider vote might happen multiple times during a workshop, especially if there are issues that need a tie-breaker to resolve.

---

### 3 mechanics

1. Standardized, Anonymized Note Taking
2. Multi-Layered Voting
3. Timeboxing



Every exercise in a workshop should be timeboxed to ensure that the workshop actually gets completed and to avoid certain exercises dragging on too long.

The time boxing should always feel a little too short, while still being fair. You may also add or remove time as you see fit depending on the situation.

An example of this might be during Lightning Demos, if you feel the workshop needs more inspiration, you could extend this section.

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## The **ANATOMY** of a proper workshop



Principles



Framework



Mechanics



Exercises

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## EXERCISES

When it comes to workshops, there are so many exercises to choose from, it can be overwhelming! I prefer using a core set of **10 exercises** that are absolute game-changers when you really get the hang of them.

The secret is to become a pro at these essential exercises, so you can make the most impact in your workshops.



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## 10 CORE exercises

1. Challenges Interview
2. 10 for 10 Brainstorm
3. Sailboat
4. Lightning Demos
5. Applied Users Story Mapping
6. Process Map
7. Purpose & Guiding Principles
8. Concept Creation
9. Action Board
10. Storyboard

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# Introduction

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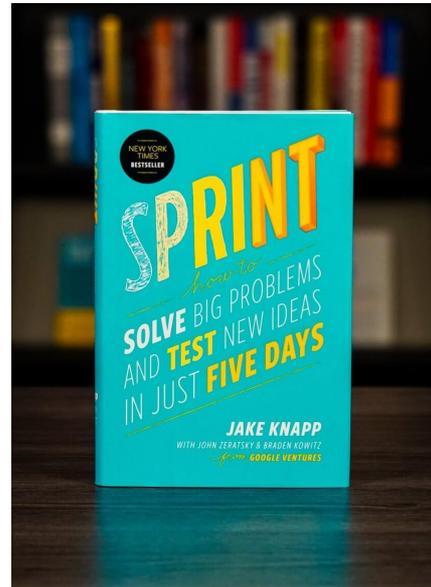
**DG Sprint™  
methodology**

## History of the **DESIGN SPRINT**

**Jake Knapp** worked at Microsoft and later at Google. He experienced firsthand how building products would often take months, or even a year, before they could be launched.

Something clicked for Jake in 2009 when he was in Stockholm for **1 week** in January. During that short amount of time, he **designed, prototyped, and tested an idea** - which turned out to be Google Hangout.

That's when he realized that there had to be a better way to build products!



## History of the **DESIGN SPRINT**

So Jake was thinking about that amazing magic that happened during that one week of collaboration and design.

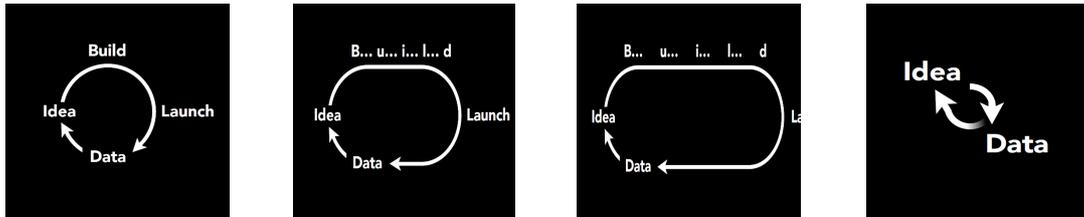
And he was trying to figure out, what does **a perfect week** actually look like?

- ✓ Confidence
- ✓ Commitment
- ✓ Momentum
- ✓ Hard & Fun



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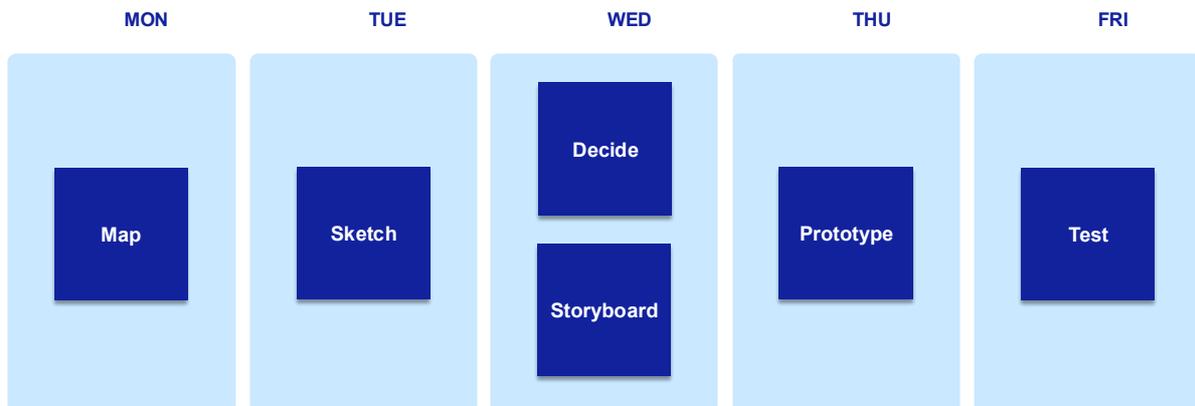
Get data about an idea **FAST!**



The Design Sprint

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The **STANDARD** design sprint



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## What is a design **SPRINT**?

The Design Sprint is a **step-by-step five-day system** that helps you solve big problems and test big ideas. It's being used a lot for building better products faster.

A sprint is about **moving fast, getting momentum** and stopping at everything to be right kills it.

I started using the design sprint because it's such a simple and obvious way to **kickstart a data governance program**. You can plug it into any type of problem, run the process, and always make sure you're validating ideas and solving those problems in a really short amount of time!



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## What is a **STRATEGY** sprint?

The Strategy Sprint is a **structured process** - think of it as an enhanced, more dynamic variant of the Design Sprint.

It's all about guiding leadership teams to design an actionable, impactful strategy.

During the Strategy Sprint workshop, we dive deep into the client's business **purpose** and critical **challenges**. Together, we generate coordinated **actions** to overcome these hurdles and propel the company forward.

No more fluff or pie-in-the-sky thinking - we focus on clarity and tangible action.



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## How did this turn into a **DATA GOVERNANCE Sprint™**?

When it comes to setting up Data Governance, you've got to make some **important decisions** and tackle those **big problems**. It can feel like it takes forever sometimes – weeks, months, or even years! Endless meetings, decisions being challenged repeatedly, and constantly shifting focus to the next urgent matter.

Having a structured process – *like the Design and Strategy Sprint* - to make decisions, test ideas and solve problems (or data use cases) quickly is a true **game-changer** in the field of Data Governance.

It's like finding the secret sauce that makes everything smoother and more efficient. Because in the end you want to make it stick!



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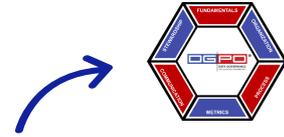
## Now what is a **DATA GOVERNANCE SPRINT™**?

Imagine a five-week journey where you **design, build, and test** core components of your data governance program. This is what our Data Governance Sprint™ is all about.

It's a structured, **hands-on experience** for data leadership teams, that uses a proven, repeatable approach that transforms your data governance concepts into reality **in weeks, not months**.

From designing a winning, action-oriented data governance strategy that moves your company to managing data as an asset, to creating a business glossary and piloting an operating model with engaged data stewards—this **iterative approach** helps you make tangible progress in no time, while keeping momentum and morale high.

# Data Governance SPRINT™ to the rescue



## 1 Establishing Data Governance CAPABILITIES



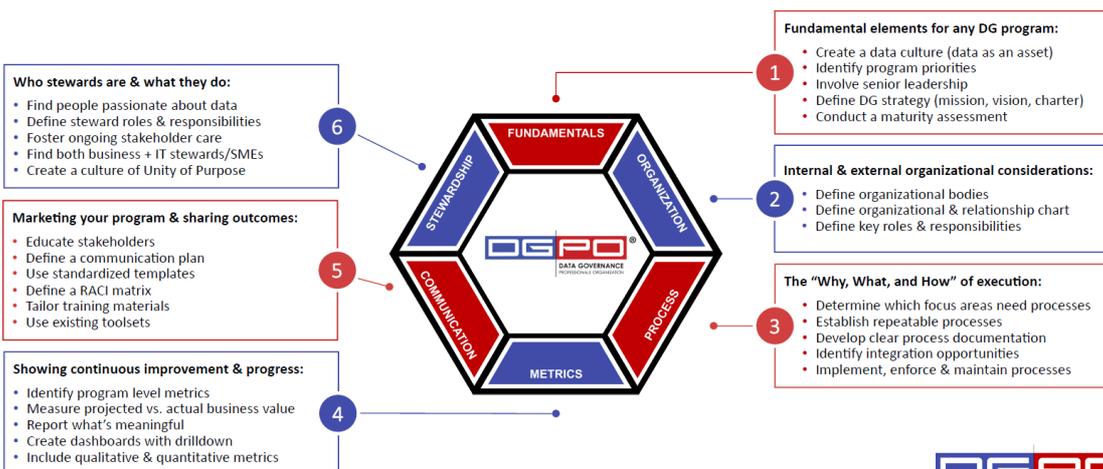
## 2 Through Incremental Implementation of USE CASES



## 3 In WEEKS Instead of Months



# DGPO Framework – Core Areas of Practice (CAP)



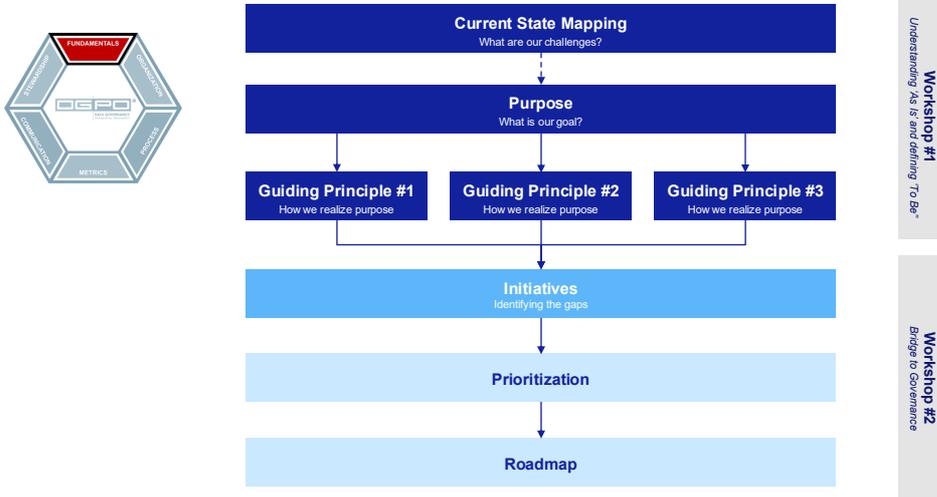
@dgpros | #DGPO

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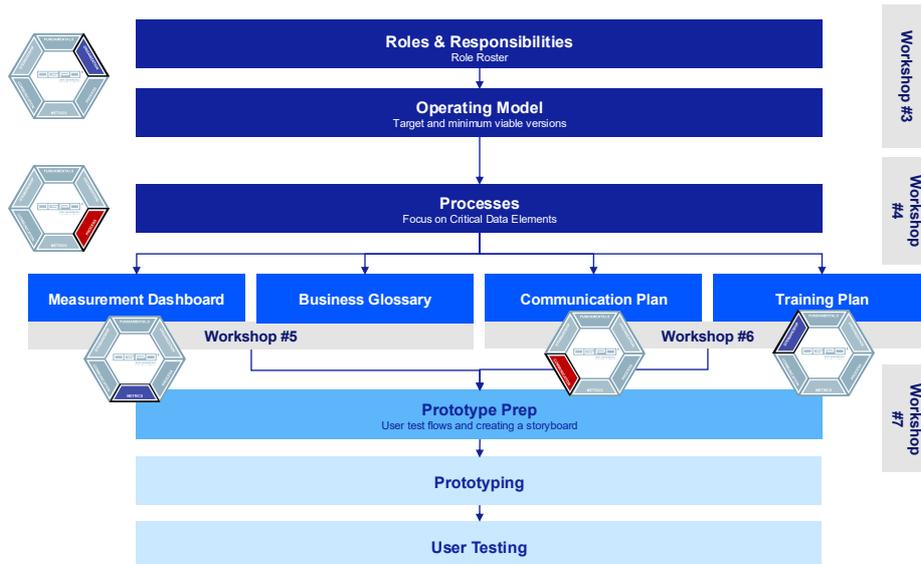


Source: <https://dgpo.org/>

# Data Governance SPRINT™



# Data Governance SPRINT™



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## What **PROBLEMS** should you solve in a sprint?

It's super important to bring the **right types of problems (or data use cases)** into a sprint, or you risk wasting people time and also poisoning people against the idea that Design Sprints can be effective.

Problems should be:

- Big enough
- Costly enough
- Be validated quickly
- Not if one or two people can already address

I usually go for data quality related problem. Data quality pain points is something that every company is struggling with and is often a quick win.



---

## Choose the right **PEOPLE** for the sprint team

You should involve a mix of stakeholders and experts who can provide different insights and perspectives on the challenge. For the Data Governance sprints, this could be:

- ✓ The CDO (or someone similar C-level person)
- ✓ The data governance officer
- ✓ Some business owners from various departments
- ✓ Somebody from IT

Having a mix of people is ideal!

I recommend involving no more than **seven people** to keep things lean and manageable.



## Choosing a **DECIDER**

You'll need a designated Decider. This is the person who actually has the **authority** to make decisions on the topic and take **responsibility** for them. It's usually the CEO, CDO, or senior manager.

Your Decider will also help you assemble the rest of the Sprint team.

### What if the decider can't be present?

- Involve the decider in expert interview, the map and long term questions and goals.
- Need to hand over decision-making power to somebody in the room and should be final.



## Key **SUCCESS** Factors! ...but also **PITFALLS**

- **Start with the problem and assess the current state**
  - ❑ Data Governance must be problem-focused—address specific business problems that need solving. But don't boil the ocean!
  - ❑ Evaluate your existing data landscape to understand the current state before initiating efforts.
- **Focus on critical data and deliver measurable benefits**
  - ❑ Start with governing Critical Data Elements (CDEs) to create the greatest impact.
  - ❑ Ensure the focus is on improving data quality, accessibility, security, privacy, and retention.
- **Deliver early wins and demonstrate value**
  - ❑ Deliver measurable benefits early on to build momentum and maintain stakeholder support.
  - ❑ Data Governance must demonstrate real and ongoing value to the organization, so link it to the business strategy.
- **Secure commitment and communicate effectively**
  - ❑ Gain ongoing support both from the top (leadership) and the bottom (operational level).
  - ❑ Keep stakeholders informed and engaged—communicate the value of Data Governance consistently.
- **Prioritize process over tools**
  - ❑ Focus on establishing strong processes for Data Governance rather than relying on technology alone.
- **Define control measurements and evolve into business as usual**
  - ❑ Set clear metrics to track progress and success.
  - ❑ Treat Data Governance as a continuous process that evolves into business as usual, not a one-off initiative.

# Week 1



## WEEK 1 of 5

Laying the Groundwork | The Fundamentals



## WEEK 1 of 5

Laying the Groundwork | The Fundamentals

### Welcome to Week 1: Laying the Groundwork for Your Data Governance Sprint™

This week is all about building a strong foundation for our Data Governance Sprint™.

We'll focus on onboarding the right team, ensuring everyone is on the same page, and aligning our goals. By the end of this week, we'll have a clear understanding of our data governance challenges, a well-defined purpose, and a set of guiding principles that will steer us through the rest of the DG Sprint™.

This is where we establish **the momentum** that will carry us forward, so let's dive in and start strong.

## Week 1

1

Monday

2

Tuesday

3

Wednesday

4

Thursday

5

Friday

## WEEK 1 of 5

### Laying the Groundwork | Set-up and Onboarding

Begin by **kicking off internally** with your core team, ensuring that senior leadership is engaged and assigns the crucial role of **'The Decider'**,\* who will have the final say on key decisions.

Identify and assemble the right stakeholders for the Sprint. Prepare and distribute an online survey to capture initial insights into the organization's data governance maturity.

Some activities, such as sending out the survey and identifying stakeholders, can be initiated before the official start of the Sprint. This groundwork is essential for ensuring the DG Sprint™ runs smoothly and efficiently.

*\* Probably The Decider will be the Chief Data Officer (CDO) or somebody of the senior executive team with a similar role.*

#### Engage Senior Leadership

- Schedule a brief kick-off meeting with senior leadership to discuss the Sprint's objectives and their role in the process.
- Confirm the assignment of the **'Decider'** role, who will make final decisions during the DG Sprint™.

#### Assemble the Right Team

- Identify and invite key stakeholders and team members to participate in the DG Sprint™ workshops.
- Ensure **diversity** in the team by including members from various departments who interact with data.

#### Distribute the Online Survey

- Develop and distribute an online survey to assess the organization's data governance **maturity**.
- Set a deadline for survey completion to allow for timely analysis and integration into the workshop planning.

## WEEK 1 of 5

### Laying the Groundwork | Awareness Session

Our Awareness Session is designed to establish a **common understanding** of the importance of data within your organization.

We'll explore the concept of "data as an asset," ensuring that every participant recognizes its value and understands how it contributes to our business objectives.

This session will help get everyone on the same page and align our perspectives before we delve into the more detailed aspects of the Sprint.

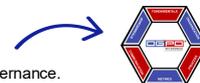
The session should be limited to **1 hour**, so please send out the invite well in advance to ensure full participation.

#### Introduction to Data as an Asset

- Develop a brief presentation explaining the concept of "data as an asset" and its **importance** to the organization.
- Share examples of how data governance has positively impacted other organizations.

#### Align on Key Concepts

- Ensure all participants understand the **core areas** of practice of data governance.
- Explain in simple terms some essential concepts like data quality, data stewardship, metadata and master data.



#### Facilitate Group Discussion

- Encourage participants to share **their thoughts** on the current data culture and any misconceptions they might have.
- Address common myths and challenges related to data governance to align everyone's understanding.

# Week 1

1

Monday

2

Tuesday

3

Wednesday

4

Thursday

5

Friday

## WEEK 1 of 5

### Laying the Groundwork | The Onboarding Interviews

During the Onboarding Interviews, we'll conduct one-on-one sessions with the Decider and other key participants.

These interviews are critical for gathering **initial insights** into the challenges and priorities of your data governance program.

We'll use the information gathered to **prepopulate** some workshop documents like the Challenges Map, Challenges Interview, and the Business Needs & Culture Canvas.

This ensures that the exercises during the first workshops run smoother and more efficiently.

#### Schedule Interviews

- Arrange one-on-one interviews with the Decider and all key stakeholders participating in the Sprint. Send out invites well in advance.
- Allocate at least **60 minutes per interview** to dive deep into challenges and priorities.

#### Prepare Interview Questions

- Develop a set of **open-ended questions** focused on identifying the main data challenges, current governance needs, change capacity, and organizational goals.
- Include questions related to the Challenges Map, Challenges Interview, and Business Needs & Culture Canvas.

#### Document Insights

- Consider **recording** the interview so you can focus fully on the conversation and review it afterward for accurate documentation.
- Take detailed notes during (or after) each interview, focusing on key themes and specific pain points.
- Identify recurring **challenges or priorities** that will need to be addressed during the workshops.

# Week 1

1

Monday

2

Tuesday

3

Wednesday

4

Thursday

5

Friday

## WEEK 1 of 5

### Laying the Groundwork | Internal Research

Internal research is the backbone of our Data Governance Sprint™, ensuring that every discussion and decision is rooted in a deep understanding of your organization's current state.

This phase involves a **comprehensive review** of the insights gathered from onboarding interviews, the results of the online survey, and any existing documentation related to data governance and management.

This thorough research lays the groundwork for informed, strategic decision-making throughout the DG Sprint™.

#### Analyze Interview Data

- Review and synthesize the information gathered during the onboarding interviews.
- Identify key themes, main challenges, current situation and business objectives that will inform the workshop discussions.

#### Review Existing Documentation

- Review any existing documentation related to data governance and data management, including data flow diagrams, data lineage, data architecture, data policies, procedures, and guidelines.
- Examine any past audits, assessments, or evaluations of data management practices to identify areas of improvement or success.

#### Online Survey Analysis

- Analyze the results of the online survey to assess the organization's data governance maturity.
- Identify patterns and insights that will shape the workshop content and discussions.

## WEEK 1 of 5

### Laying the Groundwork | Workshop Set-up

The success of our Data Governance Sprint™ hinges on a well-prepared and thoughtfully organized workshop environment.

The Workshop Set-up phase is all about **finalizing logistics** and **preparing materials** to ensure our sessions are productive and focused.

A meticulous preparation will create the ideal setting for collaboration, enabling us to dive straight into the DG Sprint™ with clarity and confidence.

#### Prepopulate Workshop Documents

- Use the insights gained from our interviews and research to prepopulate the Challenges Map, Business Needs & Culture Canvas, and prepare How Might We (HMW) questions for the Challenges Interview.
- Highlight areas that require further discussion or clarification during the workshops.

#### Finalize Workshop Logistics & Materials

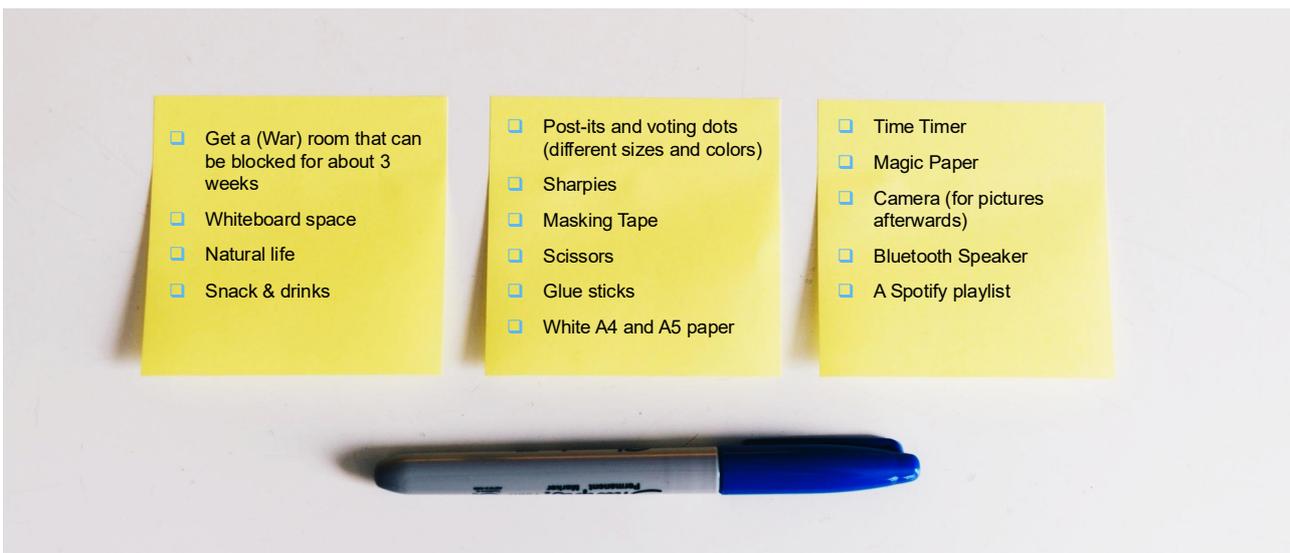
- Reserve a dedicated (War) room for the workshops, ensuring it's equipped with necessary materials (sticky notes, voting dots, markers, a whiteboard, etc.).
- Set up the room to facilitate collaboration, making sure there are ample refreshments and water available for participants throughout the day. Don't forget lunch!

#### Test Technology

- Test any technology that will be used during the workshop, such as projectors, video conferencing tools, or collaborative software.
- Ensure backup options are available in case of technical issues.

## WEEK 1 of 5

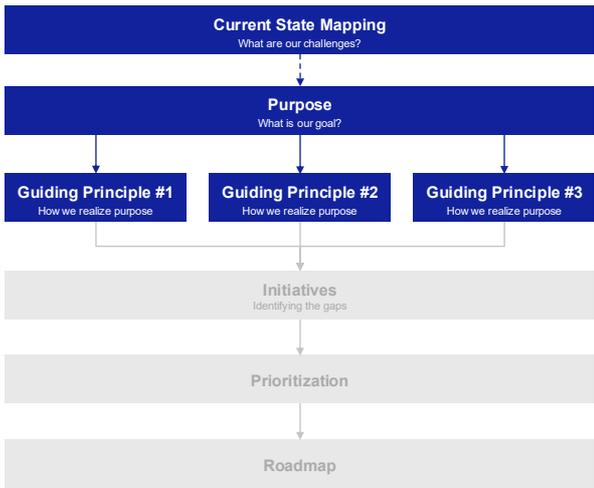
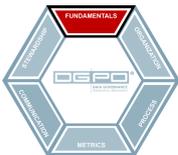
### Laying the Groundwork | Workshop Set-up



# Week 1



## Data Governance SPRINT™



Workshop #1  
Understanding "As Is" and defining "To Be"

Workshop #2  
Bridges to Governance

## WEEK 1 of 5

### The Fundamentals | Workshops 1 and 2 of 7

#### The Fundamentals Workshops: Establishing the Foundation for Data Governance

The Fundamentals workshops are the cornerstone of our Data Governance Sprint™, where we take a comprehensive look at how your organization currently manages its data assets and chart a clear path toward your desired future state.

By the end of The Fundamentals workshops, you'll have a thorough understanding of the “As Is” state, the “To Be” vision, and **the gaps** that need to be bridged. This clarity will provide a strong, actionable foundation for the remainder of the DG Sprint™ and beyond, ensuring that your data governance efforts are aligned with your strategic objectives and ready to drive meaningful progress.

##### Workshop 1: Thursday Full-Day

- Focus on understanding the current state of data management within your organization.
- Identify existing challenges and examine current practices.
- Define the “To Be” state, our vision for data governance, aligned with business objectives and strategic goals.
- Work through four key exercises: The Challenges Map, Challenges Interview, Purpose, and Guiding Principles.

##### Workshop 2: Friday Full-Day

- Highlight the gaps between the current state and the future vision established on Thursday.
- Prioritize the actions needed to bridge these gaps.
- Focus on improving the quality and understanding of critical data elements.
- Work through five engaging exercises designed to create a clear roadmap with prioritized use cases.

## The challenges MAP

	<u>P</u> lan	<u>O</u> btain	<u>S</u> tore & Share	<u>M</u> aintain	<u>A</u> pply	<u>D</u> ispose
Data (What)						
Processes (How)						
People (Who)						
Technology (How)						
<b>Location</b> (Where) and <b>Time</b> (When and How Long)						

Source: Framework for Information Quality (FIQ) © 2005, 2020 Danette McGivray, Granite Falls Consulting, Inc. www.gfalls.com

# Challenges INTERVIEW

<b>R</b> equirements and Constraints	
<b>R</b> esponsibility	
<b>I</b> mprovement and Prevention	
<b>S</b> tructure and Meaning	
<b>C</b> ommunication	
<b>C</b> hange	
<b>E</b> thics	

Source: *Broad Impact Components* © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. [www.gfalls.com](http://www.gfalls.com)

# Business NEEDS & culture

<b>Customers</b>	<b>Products</b>	<b>Goals</b>	<b>Issues</b>	<b>Strategies</b>
	<b>Services</b>		<b>Opportunities</b>	
<b>Culture</b>		<b>Environment</b>		

Source: *Business Needs* © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. [www.gfalls.com](http://www.gfalls.com)

## WEEK 1 of 5

### The Fundamentals | Workshop 1 of 7

#### Exercise 1. The Challenges Map

#### Exercise 2. Challenges Interview

#### Exercise 3. Purpose

#### Exercise 4. Guiding Principles

We start by capturing the data challenges and pain points on a Challenges Map.

The purpose is to get a **high-level overview** of how the key components (data, processes, people, & technology) interact with the information life cycle within the organization.

It helps to **identify root causes** and **determine improvements** needed to correct existing problems and prevent them from reappearing.

## WEEK 1 of 5

### Workshop 1 of 7 | The Challenges Map

#### 1. Timing

Between 1 to 2 hours

#### 2. What you'll need

#### 3. Introducing the exercise

#### 4. Flow

# WEEK 1 of 5

## Workshop 1 of 7 | The Challenges Map

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



# WEEK 1 of 5

## Workshop 1 of 7 | The Challenges Map

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- First, we'll start to **collect** and **visualize** all our data challenges on the Challenges Map. The goal is to understand how the key components (data, processes, people, & technology) interact with the information life cycle within an organization.
- The key is to get a high-level view of how the company manages its data assets.
- The Challenges Map is part of the **Framework for Information Quality (FIQ)** designed by Danette McGilvray\*. The FIQ can be used as a quick reference and helpful tool for **diagnosis**, **planning** and **communication** about the components necessary for high-quality information.

\* *Framework for Information Quality (FIQ)* © 2005, 2020 Danette McGilvray, Executing Data Quality Project. Granite Falls Consulting, Inc. [www.gfalls.com](http://www.gfalls.com)

## WEEK 1 of 5

### Workshop 1 of 7 | The Challenges Map

1. Timing

2. What you'll need

3. Introducing the exercise

4. Flow

- To streamline the process, consider **pre-filling** the Challenges Map with insights gathered from the Onboarding Interviews. This will significantly enhance the efficiency of the exercise, providing participants with concrete examples to kickstart their thinking and making the session flow much more smoothly.
- The exercise will run in **4 rounds**, focusing on different key components one at a time and its impact on the data life cycle.
- With regards to what information to focus on, think about specific **critical data subject domains** and how the data is managed throughout its life cycle.

## WEEK 1 of 5

### Workshop 1 of 7 | The Challenges Map

1. Timing

2. What you'll need

3. Introducing the exercise

4. Flow

#### Step 1: Reflect on Data (What)

- **Timing:** 10 - 15 minutes
- Ask everyone to silently write as many data challenges and pain points they experience across their information life cycle on individual sticky notes as they can think.
- Emphasis that they only need to focus on the **“Data (What)” component** first and that they be **as granular as possible**.
- One challenge per sticky note.

Inconsistent definitions across departments

Frequent missing fields in customer data

Data format phone number incompatible across systems

Outdated records not regularly purged

Reported figures differ from operational data

## WEEK 1 of 5

### Workshop 1 of 7 | The Challenges Map

#### Step 1: Reflect on Data (What)

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Account for Location and Time:** While thinking about the data challenges, also consider where and when these challenges occur within your organization. Reflect on when specific information needs to be available and for how long it needs to be retained or accessed. For example, think about:
  - **Where** (location) certain tasks related to data occur (e.g., physical location or system location).
  - **When** (time) specific data needs to be available, how long it should remain accessible, and what dependencies exist around timing (e.g., real-time needs, historical access).

Geographical data missing for specific regions

Data entry errors during peak hours

Backups not aligned with global operations

Real-time data updates lag during off-hours

Data access restricted to certain locations

## WEEK 1 of 5

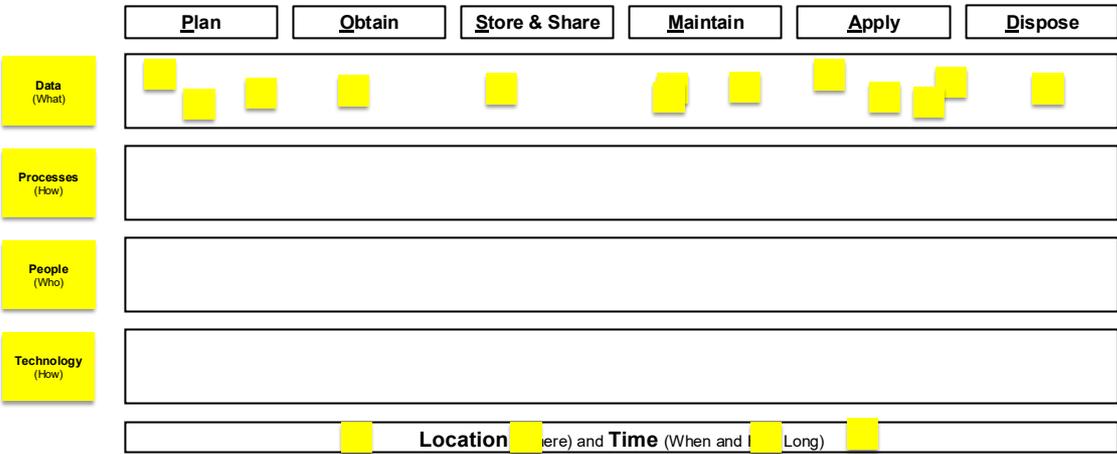
### Workshop 1 of 7 | The Challenges Map

#### Step 2: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 - 10 minutes
- One by one, each participant will approach the Challenges Map and present their challenges to the group.
- Simply **read out** the challenges as written on their sticky notes—this is not the time for discussion or debate.
- After presenting, they place their sticky notes on the Challenges Map in the designated intersection for "Data (What)" within the information life cycle.
- If there are **duplicates**, they could remove or stack them.

# The challenges MAP



Source: Framework for Information Quality (FIQ) © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. www.gfalls.com

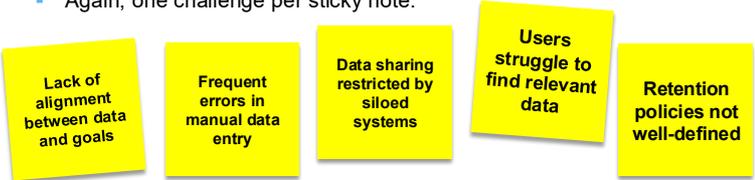
# WEEK 1 of 5

Workshop 1 of 7 | The Challenges Map

## Step 3: Reflect on Processes (How)

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 - 15 minutes
- Just like step 1, ask everyone to silently write as many data process challenges and pain points they experience across their information life cycle on individual sticky notes.
- Emphasis that they now only need to focus on the **“Processes (How)” component** and that they be as granular as possible.
- Again, one challenge per sticky note.



# WEEK 1 of 5

## Workshop 1 of 7 | The Challenges Map

### Step 4: Present

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 5 - 10 minutes
  - Similarly like step 2, each participant will approach the Challenges Map, one by one, and present their challenges to the group.
  - Simply **read out** the challenges as written on their sticky notes—this is not the time for discussion or debate.
  - After presenting, they place their sticky notes on the Challenges Map in the designated intersection for “Processes (How)” within the information life cycle.

## The challenges MAP



Source: Framework for Information Quality (FIQ) © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. www.gfalls.com

## WEEK 1 of 5

### Workshop 1 of 7 | The Challenges Map

#### Step 5: Reflect on People and Organization (Who)

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 - 15 minutes
- Rinse and repeat. Now ask everyone to silently write as many people and organization challenges and pain points they experience across the information life cycle on individual sticky notes.
- Emphasis that they now only need to focus on the **“People and Organization (Who)” component** and that they be as granular as possible.
- Again, one challenge per sticky note.



## WEEK 1 of 5

### Workshop 1 of 7 | The Challenges Map

#### Step 6: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 - 10 minutes
- Again, each participant will approach the Challenges Map, one by one, and present their challenges to the group.
- Simply **read out** the challenges as written on their sticky notes—this is not the time for discussion or debate.
- After presenting, they place their sticky notes on the Challenges Map in the designated intersection for “People and Organization (Who)” within the information life cycle.

# The challenges MAP



Source: Framework for Information Quality (FIQ) © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. www.gfalls.com

## WEEK 1 of 5 Workshop 1 of 7 | The Challenges Map

### Step 7: Reflect on Technology (How)

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 - 15 minutes
- Finally, ask everyone to silently write as many technology challenges and pain points they experience across the information life cycle on individual sticky notes.
- Emphasis that they now only need to focus on the **“Technology (How)” component** and that they be as granular as possible.
- Again, one challenge per sticky note.



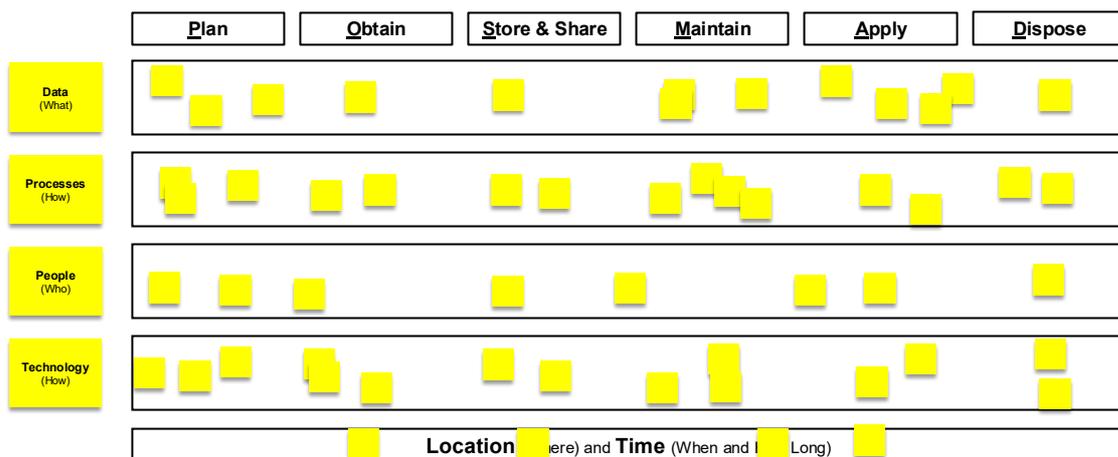
# WEEK 1 of 5

## Workshop 1 of 7 | The Challenges Map

### Step 8: Present

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 5 - 10 minutes
  - Again, each participant will approach the Challenges Map, one by one, and present their challenges to the group.
  - Simply **read out** the challenges as written on their sticky notes—this is not the time for discussion or debate.
  - After presenting, they place their sticky notes on the Challenges Map in the designated intersection for "Technology (How)" within the information life cycle.

## The challenges MAP



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# The Challenges Map



# WEEK 1 of 5

Workshop 1 of 7 | The Challenges Map

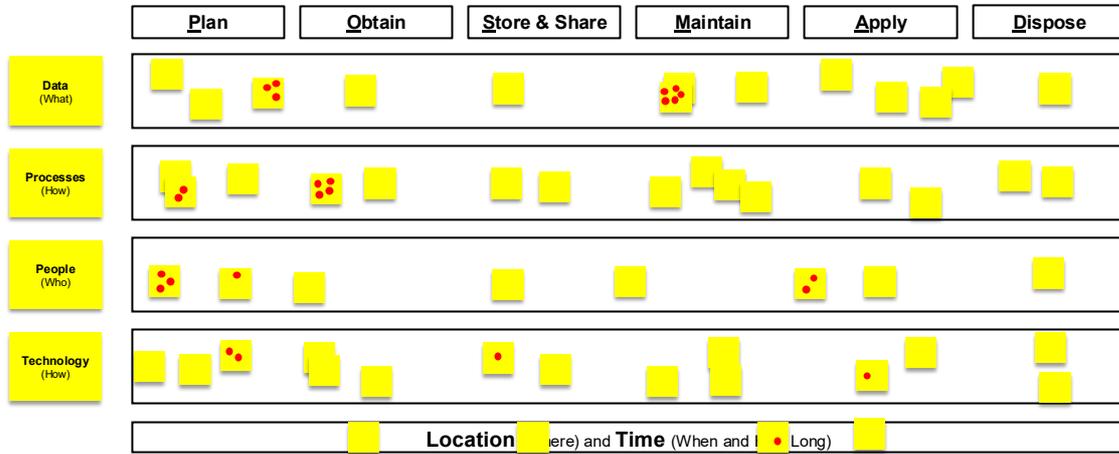
## Step 9: Heatmap Voting

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 10 minutes
- Once all challenges have been mapped, ask the participants to take a few minutes to **silently review** the entire Challenges Map and identify these areas they find most important, challenging, or critical.
- Each participant will receive a limited number of red **voting dots**, so they should really think about what they want to vote on.
- Next, ask the participants to place their dots on the areas of the map that they find most critical or in need of attention.
- There are **no voting rules**, so they can place more than one dot on areas they want to focus on.
- Avoid discussions! The goal is to get a **heatmap overview**.



# The challenges MAP



Source: Framework for Information Quality (FIQ) © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. www.gfalls.com

# The Challenges Map



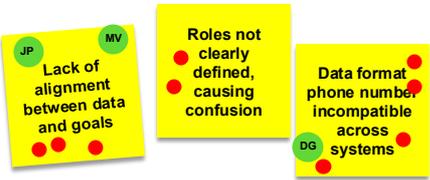
# WEEK 1 of 5

## Workshop 1 of 7 | The Challenges Map

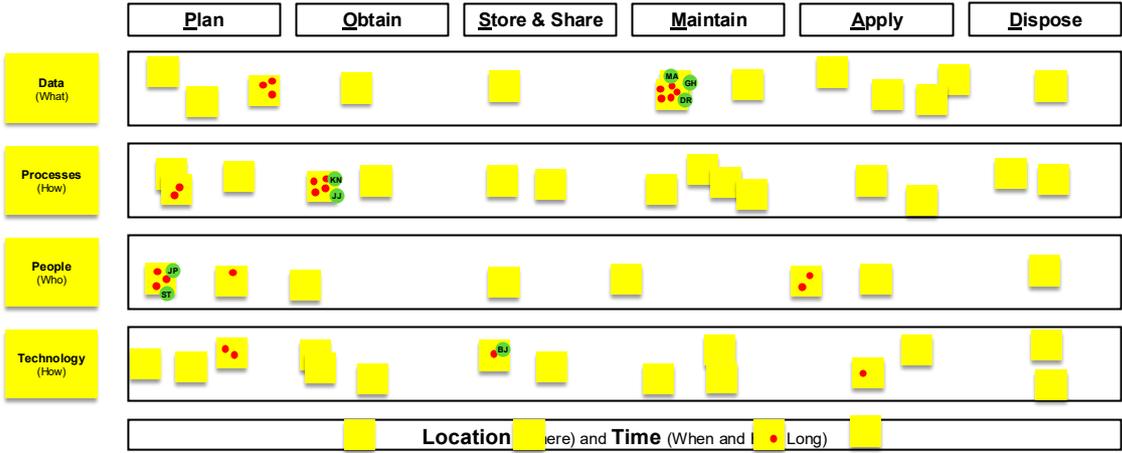
### Step 10: Strawpoll Voting

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Give each participant a **large voting dot** and have them write their **initials** on it.
- Set a timer for 5 minutes and have participants silently decide which challenge they think is **most critical** (without voting).
- Once they've decided which one they'll choose, they should write their **reasoning** on a sticky note.
- Once the time is up, everyone should **vote at the same time** to avoid influencing each other's votes.



## The challenges MAP



Source: Framework for Information Quality (FIQ) © 2005, 2020 Danette McGivray, Granite Falls Consulting, Inc. www.gfalls.com

# The Challenges Map



# WEEK 1 of 5 Workshop 1 of 7 | The Challenges Map

## Step 11: Present

- 1. Timing
  - 2. What you'll need
  - 3. Introducing the exercise
  - 4. Flow
- **Timing:** 1 minute per person
  - The Facilitator goes over the Straw Poll votes and calls each participant **one by one** to explain to the group:
    1. Which challenge they've chosen
    2. Why did they choose it
  - The Facilitator needs to take care that the participants don't ramble and **don't take more than one minute** to explain their reasoning.



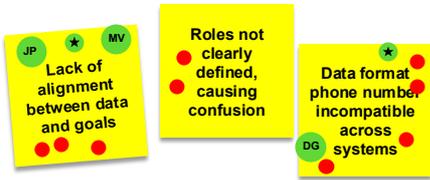
# WEEK 1 of 5

## Workshop 1 of 7 | The Challenges Map

### Step 12: Decider Vote

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 3 minutes
- The Decider is given one (or two, or three) **special voting dot(s)** and must decide which challenges are the most critical ones to address.
- Have the Decider **explain** their choice to the team.



## The challenges MAP



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## WEEK 1 of 5

### The Fundamentals | Workshop 1 of 7

**Exercise 1.** The Challenges Map

**Exercise 2.** Challenges Interview

**Exercise 3.** Purpose

**Exercise 4.** Guiding Principles

We will try to get a deeper understanding of the challenges and the **broad-impact components** that affect the quality of information.

This is a **structured discussion** where we listen to our participants and collect all the challenges that come up during the interview.

We capture our thoughts as questions in the **'How Might We'** format. The HMW format helps us define our biggest challenge without prescribing a solution.

Next, we narrow down the Challenges Interview (written in the form of "How Might We" questions) and identify **focus areas** in the Challenge Map.

## WEEK 1 of 5

### Workshop 1 of 7 | Challenges Interview

**1.** Timing

Between 30 to 60 minutes

**2.** What you'll need

**3.** Introducing the exercise

**4.** Flow

# WEEK 1 of 5

## Workshop 1 of 7 | Challenges Interview

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



# WEEK 1 of 5

## Workshop 1 of 7 | Challenges Interview

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- Next, we'll start to **collect** and **visualize** all the additional factors (called **broad-impact components**) that affect the quality of the data in our organization overall.
- The broad-impact components are part of the **Framework for Information Quality (FIQ)** designed by Danette McGilvray\*.
- There are 7 broad-impact components, abbreviated to **RRISCEE**.
- These broad-impact components should be considered throughout the POSMAD Information Life Cycle as they affect the four key components.

\* Framework for Information Quality (FIQ) © 2005, 2020 Danette McGilvray, Executing Data Quality Project. Granite Falls Consulting, Inc. www.gfalls.com

## WEEK 1 of 5

### Workshop 1 of 7 | Challenges Interview

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- These are the 7 broad-impact components\*:
  - 1. Requirements and Constraints
  - 2. Responsibility
  - 3. Improvement and Prevention
  - 4. Structure, Context, and Meaning
  - 5. Communication and Training
  - 6. Change
  - 7. Ethics
  
- Goal is to **narrow down** the Challenge Map to the most vital challenges we want to focus on in our Data Governance program.

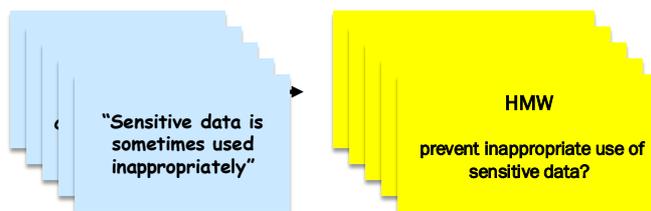
\* Framework for Information Quality (FIQ) © 2005, 2020 Danette McGilvray, Executing Data Quality Project. Granite Falls Consulting, Inc. www.gfalls.com

## WEEK 1 of 5

### Workshop 1 of 7 | Challenges Interview

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- During our Challenges Interview, the participants are **the experts**, and the facilitator is going to interview them one by one.
- Only **one person speaks** at a time during the interview process. Everyone else takes notes using HMW's.
- We utilize the **"How Might We's"** (HMW's) standardized note-taking system, transforming problems and challenges in an actionable way without prescribing a solution.

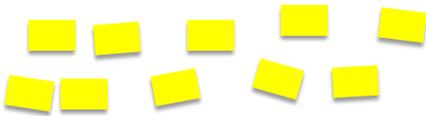


# WEEK 1 of 5

## Workshop 1 of 7 | Challenges Interview

### Step 1: The Interview

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- **Timing:** 5 minutes per person
- Only interview **one person** at a time.
- Formulate questions that refer to the 7 broad-impact components.
- As soon as you've created an HMW, pause the interview and show it as an **example**.
- It's okay to skip people who don't want to speak.
- Use **simple, open-ended phrases** like:
  - "talk about the responsibility challenges you're having"
  - "go into more detail on that"
  - "tell me more"

# Challenges INTERVIEW



Let the broad-impact components guide your open-ended questioning

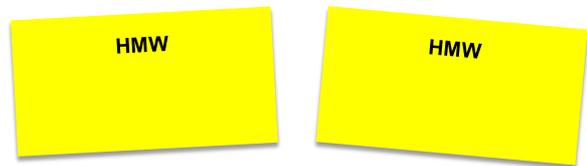
<b>R</b> equirements and Constraints	Business, User, Functional, Technology, Legal, Regulatory, Compliance, Contractual, Industry, Internal Policies, Access, Security, Privacy, Data Protection
<b>R</b> esponsibility	Accountability, Authority, Ownership, Governance, Stewardship, Motivation, Reward
<b>I</b> mprovement and Prevention	Continuous Improvement, Root Causes, Prevention, Correction, Enhancement, Audit, Controls, Monitoring, Metrics, Targets
<b>S</b> tructure and Meaning	Definitions, Relationships, Metadata, Standards, Reference Data, Data Models, Business Rules, Architecture, Semantics, Taxonomies, Ontologies, Hierarchies
<b>C</b> ommunication	Awareness, Engagement, Outreach, Listening, Feedback, Trust, Confidence, Education, Training, Documentation
<b>C</b> hange	Management of Change and Associated Impact, Organizational Change Management, Change Control
<b>E</b> thics	Individual and Societal Good, Justice, Rights and Freedoms, Truthfulness, Standards of Conduct, Avoiding Harm, Supporting Well-Being

Source: **Broad Impact Components** © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. www.gfalls.com

**Step 1: The Interview**

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- Give each participant a block of rectangular sticky notes.
- Write “HMW” on the top of each new sticky note.
- Everyone listens as the expert talks, and **re-writes** problems as “How Might We’s”
- Focus on quantity!



**Step 2: Present**

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

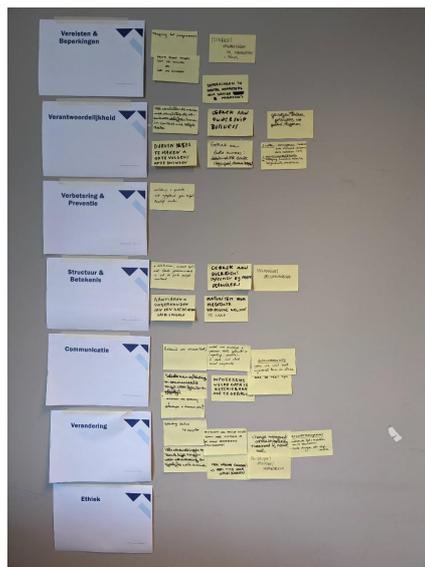
- **Timing:** 5 - 10 minutes
- Each participant will take turns presenting their HMW’s to the group. Simply **read the challenges** as written on your sticky notes—this is not the time for discussion or debate.
- After presenting, place your HMW’s on the RRISCE matrix displayed on the wall.
- Then, as a group, identify any duplicates and either remove or stack them together.

# Challenges INTERVIEW

<b>R</b> equirements and Constraints	[Yellow sticky note]	[Yellow sticky note]				
<b>R</b> esponsibility	[Yellow sticky note]					
<b>I</b> mprovement and Prevention	[Yellow sticky note]	[Yellow sticky note]	[Yellow sticky note]			
<b>S</b> tructure and Meaning	[Yellow sticky note]	[Yellow sticky note]	[Yellow sticky note]			
<b>C</b> ommunication	[Yellow sticky note]	[Yellow sticky note]	[Yellow sticky note]	[Yellow sticky note]		
<b>C</b> hange	[Yellow sticky note]					
<b>E</b> thics	[Yellow sticky note]					

Source: *Broad Impact Components* © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. [www.gfalls.com](http://www.gfalls.com)

# Challenges INTERVIEW



# WEEK 1 of 5

## Workshop 1 of 7 | Challenges Interview

### Step 3: Heatmap Voting

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 minutes
- Ask the participants to look through the HMWs (silently) and vote on those HMWs they find most important, challenging, or critical.
- Each participant has a limited number of red **voting dots**, so they should really think about what they want to vote on.
- There are **no voting rules**, so they can place more than one dot on areas they want to focus on.
- If you want to take notes, use a sticky note.
- Avoid discussions! The goal is to get a heatmap overview.



# Challenges INTERVIEW

<b>R</b> equirements and Constraints	
<b>R</b> esponsibility	
<b>I</b> mprovement and Prevention	
<b>S</b> tructure and Meaning	
<b>C</b> ommunication	
<b>C</b> hange	
<b>E</b> thics	

Source: **Broad Impact Components** © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. www.gfalls.com

# WEEK 1 of 5

## Workshop 1 of 7 | Challenges Interview

### Step 4: Decider Vote

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Give the Decider **three voting dots** and allow them to vote on the areas the Decider find most important, challenging, or critical.



# Challenges INTERVIEW

<b>R</b> equirements and Constraints	
<b>R</b> esponsibility	
<b>I</b> mprovement and Prevention	
<b>S</b> tructure and Meaning	
<b>C</b> ommunication	
<b>C</b> hange	
<b>E</b> thics	

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## WEEK 1 of 5

### Workshop 1 of 7 | Challenges Interview

#### Step 5: Revisualize

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Remove all but the **top-voted HMW questions** from the RRISCCE matrix, remembering that the Decider vote is automatically at the top.
- These are our **key challenges**.



## WEEK 1 of 5

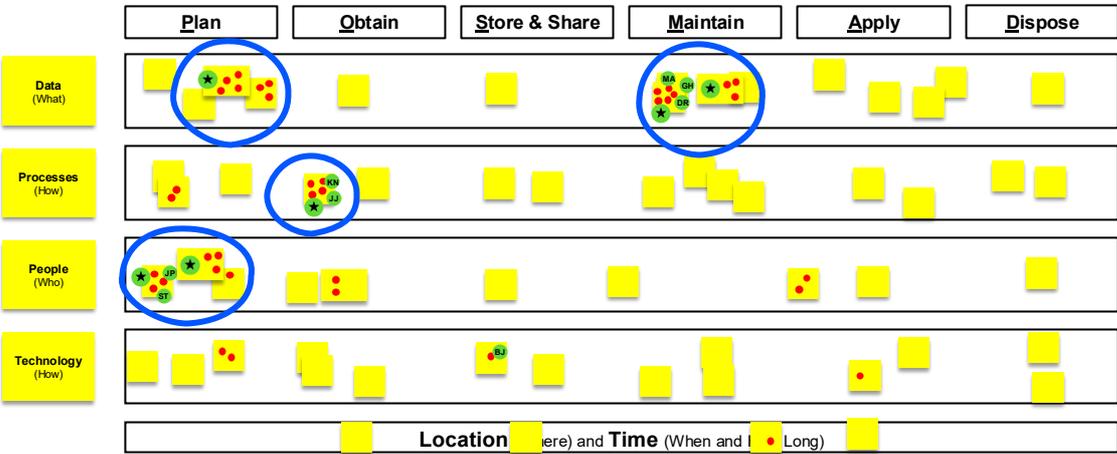
### Workshop 1 of 7 | Challenges Interview

#### Step 6: Decide on focus areas

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

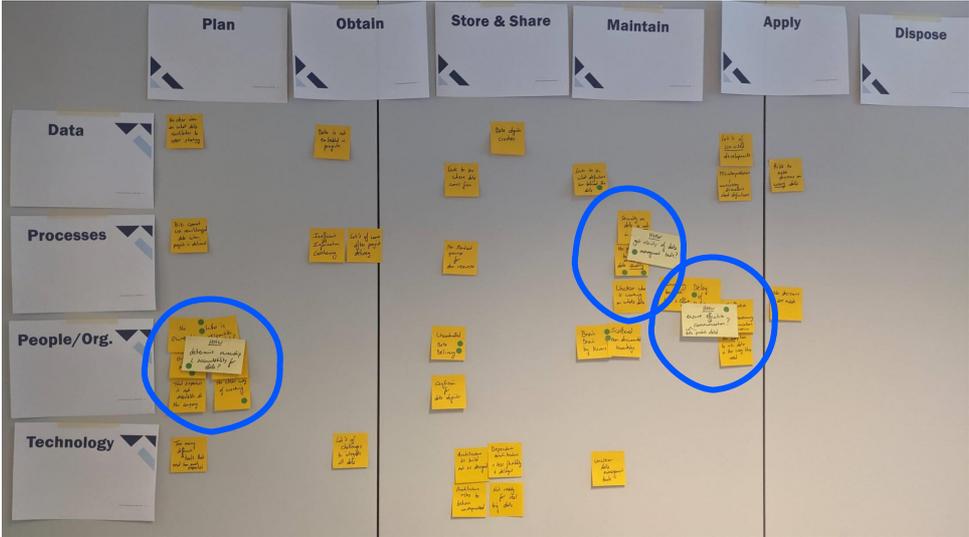
- **Timing:** 5 minutes
- Let's go back to the **Challenge Map** and put our key challenges on the corresponding areas, indicating how they affect the Information Life Cycle.
- Then we identify the most critical **focus areas** in the map.
- These focus areas will highlight the use cases and projects that we'll include in our Data Governance roadmap.

# The challenges MAP



Source: Framework for Information Quality (FIQ) © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. www.gfalls.com

# The challenges MAP



## WEEK 1 of 5

### The Fundamentals | Workshop 1 of 7

**Exercise 1.** The Challenges Map

**Exercise 2.** Challenges Interview

**Exercise 3.** Purpose

**Exercise 4.** Guiding Principles

In this exercise, we will focus on identifying the **fundamental reason why** we are implementing data governance within our organization. This isn't just about the technical aspects or the tasks we need to perform; it's about aligning our data governance efforts with the overarching business objectives and goals.

Understanding this purpose will ensure that every data governance initiative we undertake directly contributes to the success and strategic direction of the company.

A well-defined purpose will become **our Vision**, guiding our decisions, helping us prioritize, and making sure that everyone—across all levels—understands the critical role that data governance plays in our collective success.

## WEEK 1 of 5

### Workshop 1 of 7 | Purpose Mapping

**1.** Timing

Between 45 to 60 minutes

**2.** What you'll need

**3.** Introducing the exercise

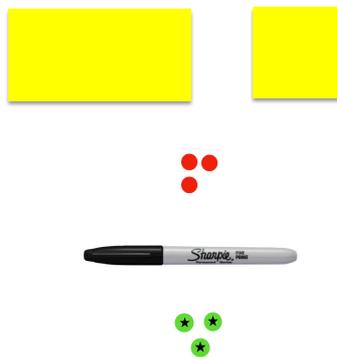
**4.** Business Needs & Culture canvas

**5.** Flow

## WEEK 1 of 5

### Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow



## WEEK 1 of 5

### Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

- Forget everything you might have read about "purpose" in the past. We're not here to create a fluffy, non-committal vision statement that sounds good but doesn't drive action. In this Data Governance Sprint™, we'll focus on defining a **clear, practical purpose** for our data governance efforts—one that will remain relevant and actionable when you look back in two years.
- This purpose will be the foundation of your entire Data Governance Strategy. It will guide our actions throughout the sprint and serve as the **driving force** behind every decision we make in this workshop (and outside), ensuring our efforts directly contribute to achieving the **company's strategic goals**.
- Our purpose also serves as **our vision** for our Data Governance program.

## WEEK 1 of 5

### Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

- Before we can define the purpose of our data governance efforts, it's crucial that we first gain a solid understanding of the company's **business needs, goals, and culture**.
- This understanding will allow us to align our data governance purpose effectively with the company's overall strategies. By doing so, we ensure that our data governance initiatives directly support and drive the organization's success.



## WEEK 1 of 5

### Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

- The **Business Needs & Culture canvas** is a critical tool that helps us align our data governance purpose with the broader objectives and cultural context of the organization. By understanding these elements, we can ensure that our data governance initiatives are not only aligned with the company's goals but also resonate with its culture and values.



# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

### Step 1: Prepopulating and Review

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

- **Timing:** 5 minutes
- If you have already conducted onboarding interviews, you may have **prepopulated** this canvas with key insights gathered during those discussions.
- In such cases, we will begin this exercise by **reviewing** the prepopulated information together. This review helps ensure that the information accurately **reflects the current state** of the organization.



# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

### Step 2: Collecting Inputs

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

- **Timing:** 10 minutes
- If the canvas has not been prepopulated, we will start by gathering input from all participants.
- Each participant will receive a set of square sticky notes.
- For **each component** of the canvas, participants should write down **1 to 3 key points**. This should be based on their knowledge of the organization's business needs and cultural context. One key point per sticky note.



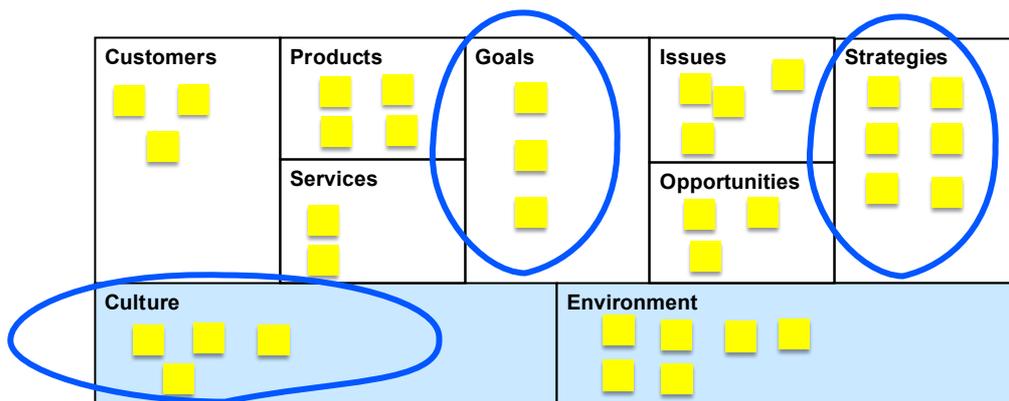
# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

### Step 3: Present

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Business Needs & Culture canvas
  5. Flow
- **Timing:** 2 minutes per person
  - Each participant will now present their sticky notes, one by one, to the group.
  - After presenting, participants will place their sticky notes in the corresponding sections of the canvas.
  - During this phase, we will avoid discussion. The goal is to collect and visualize the information.

## Business NEEDS & culture



Source: *Business Needs* © 2005, 2020 Danette McGilvray, Granite Falls Consulting, Inc. [www.gfalls.com](http://www.gfalls.com)

# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

### Step 4: Facilitated Interaction

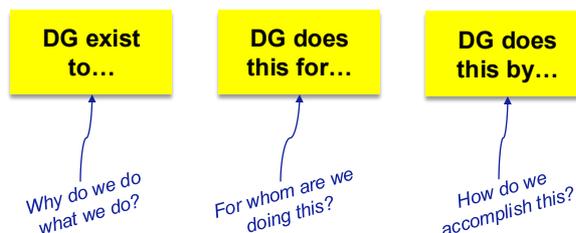
1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Business Needs & Culture canvas
  5. Flow
- **Timing:** 5 minutes
  - We will spend a few minutes facilitating interaction specifically around the **Goals, Strategies,** and **Culture** components of the canvas.
  - This ensures that the group is aligned on these critical aspects.
  - By the end of this exercise, we will have a **shared understanding** of the organization's business needs and cultural context, providing a strong foundation for the Purpose Mapping exercise.

# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

### Step 1: Write Purposes

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Business Needs & Culture canvas
  5. Flow
- **Timing:** 10 - 15 minutes
  - Give every participant a block of rectangular sticky notes.
  - Each participant writes on three sticky notes and completes each sentence:



# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

### Step 1: Write Purposes

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

- Make sure to prepare an example!

<b>DG exist to...</b> foster trust in our data.	<b>DG exist to...</b> enhance customer experience.
<b>DG do this for...</b> internal and external stakeholders who depend on our data.	<b>DG do this for...</b> our valued customers whose interactions with us are influenced by our data.
<b>DG do this by...</b> maintaining data integrity through rigorous quality checks and balances.	<b>DG do this by...</b> leveraging data insights to personalize and improve their experience.

# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

### Step 1: Write Purposes

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

- Each participant should create **2 to 3 Purposes**.
- Guide the participants by asking: *"2 years from now, in an ideal world, what purpose will Data Governance fulfill in the company and to our customers?"*
- Ensure that your purpose should give similar clarity to anyone at any hierarchical level, from CEO to janitor, **why they are doing what they are doing**.



## WEEK 1 of 5

### Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

#### Step 2: Visualize

- **Timing:** 5 minutes
- Ask participants to choose only **1 purpose sentence** from their set of purposes (so choose 1 set of three sticky notes).
- Then ask them to stick their chosen purpose sentence on the wall.
- Make sure to stick each purpose sentence nicely below each other, this makes the voting easier.



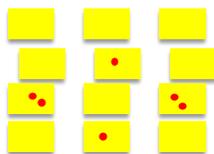
## WEEK 1 of 5

### Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow

#### Step 3: Vote

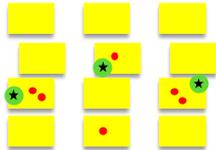
- **Timing:** 10 minutes
- Give every participant – except the decider - **3 voting dots**. ●●●
- Ask them to silently **vote on the elements** of the purpose sentences that they believe best capture the role of data governance in supporting the business objectives. (no discussion!)
- There are **no voting rules**—they can vote on their own purpose sentence if they choose.
- To cast a vote, participants should place **one dot on each** purpose sentence element they support.



# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow



### Step 4: Decider Vote

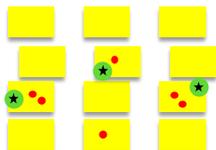


- **Timing:** 5 minutes
- Give the decider **3 special voting dots**.
- The decider goes last and is encouraged to talk about their choices.
- To cast a vote, the decider should place **one dot on each** purpose sentence element they support.
- Tell the decider that there are **no voting rules**. They can also vote on any parts of purpose sentences to create the ultimate purpose sentence.

# WEEK 1 of 5

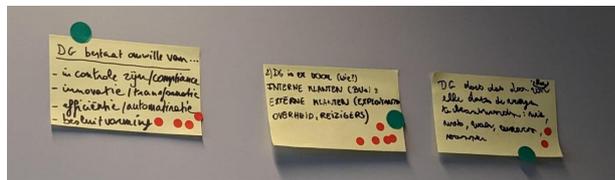
## Workshop 1 of 7 | Purpose Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Business Needs & Culture canvas
5. Flow



### Step 5: Revisualize

- **Timing:** 1 minute
- Take the purpose sentence chosen by the decider off the board and place it next to the board.



# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

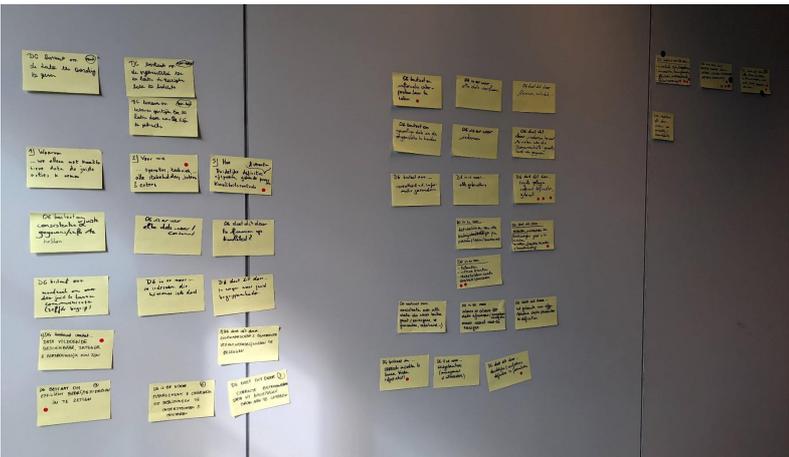
- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Business Needs & Culture canvas
- 5. Flow



# WEEK 1 of 5

## Workshop 1 of 7 | Purpose Mapping

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Business Needs & Culture canvas
- 5. Flow



## WEEK 1 of 5

### The Fundamentals | Workshop 1 of 7

**Exercise 1.** The Challenges Map

**Exercise 2.** Challenges Interview

**Exercise 3.** Purpose

**Exercise 4.** Guiding Principles



As we build upon the foundation we've established in our previous exercises—assessing the current state of our data landscape, highlighting key use cases and pain points, and defining our vision and purpose—it's now time to finalize our approach by defining **our Guiding Principles**.

These principles are the **fundamental beliefs** that will steer your organization's approach to data. Think of them as your **North Star**, providing clear direction and setting the stage for how data should be managed and treated within your company.



## WEEK 1 of 5

### Workshop 1 of 7 | Guiding Principles

**1.** Timing

Between 45 to 60 minutes

**2.** What you'll need

**3.** Introducing the exercise

**4.** Flow

## WEEK 1 of 5

### Workshop 1 of 7 | Guiding Principles

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 1 of 5

### Workshop 1 of 7 | Guiding Principles

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- A guiding principle, for instance, might be “*Data is managed and secure,*” which underscores the value your organization places on data. These principles are crucial because they articulate **what needs to happen** to realize our data governance purpose and achieve our vision.
- By the end of this exercise, we will have a set of Guiding Principles that will not only **support our purpose** but also ensure that everyone in the organization understands and aligns with our data governance strategy.

# WEEK 1 of 5

Workshop 1 of 7 | Guiding Principles

## Step 1: Write Guiding Principles

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



- **Timing:** 10 - 15 minutes
- Provide each participant with a block of rectangular sticky notes.
- Ask participants to reflect on the question: *"How do we realize our data governance purpose for our company in practical terms?"*
- Emphasize the importance of keeping it simple and high-level!
- Each participant should write up to **three sticky notes**, each completing the sentence: **"We realize this by..."**
- Each participant will create up to three Guiding Principles that outline practical steps or beliefs needed to fulfill the data governance purpose.

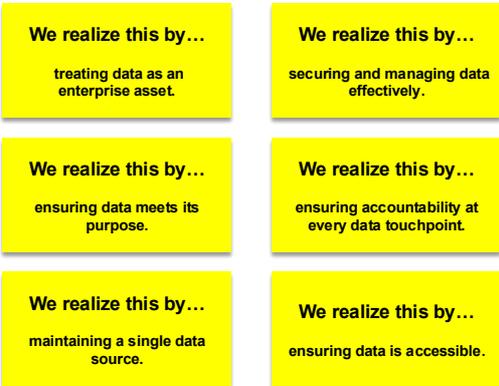
# WEEK 1 of 5

Workshop 1 of 7 | Guiding Principles

## Step 1: Write Guiding Principles

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- Make sure to prepare an **example!**



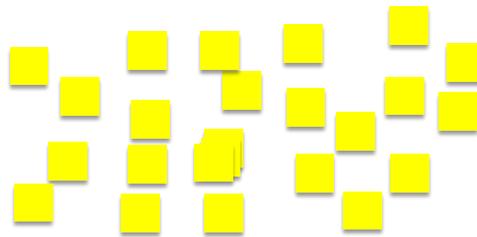
## WEEK 1 of 5

Workshop 1 of 7 | Guiding Principles

### Step 2: Visualize Principles

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Ask participants to stick all their Guiding Principles on the wall.
- Don't categorize the ideas at this stage; simply **remove any duplicates** or stack them without discussion.



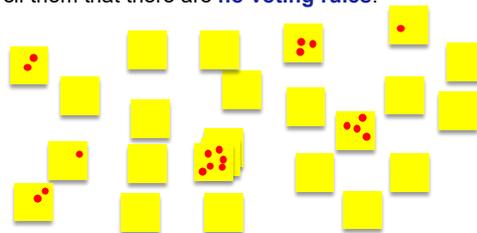
## WEEK 1 of 5

Workshop 1 of 7 | Guiding Principles

### Step 3: Vote

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Give every participant **2 voting dots**.
- Let them **silently vote** on the sticky notes that they believe to be most likely to help them achieve the data governance purpose— avoid discussions.
- Tell them that there are **no voting rules**.



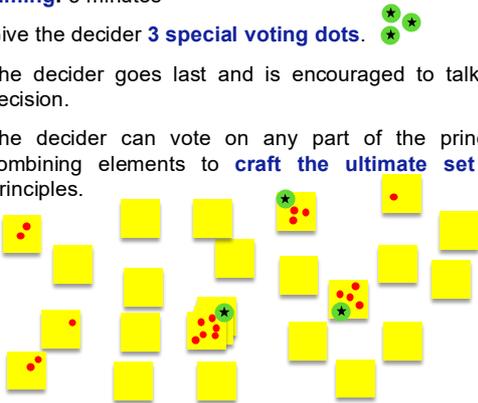
# WEEK 1 of 5

Workshop 1 of 7 | Guiding Principles

## Step 4: Decider Vote

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 5 minutes
- Give the decider **3 special voting dots**.
- The decider goes last and is encouraged to talk about their decision.
- The decider can vote on any part of the principles, even combining elements to **craft the ultimate set** of Guiding Principles.



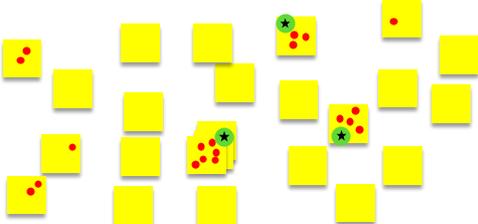
# WEEK 1 of 5

Workshop 1 of 7 | Guiding Principles

## Step 5: Revisualize

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 1 minute
- Remove all but the **Guiding Principles** voted by the Decider from the board.



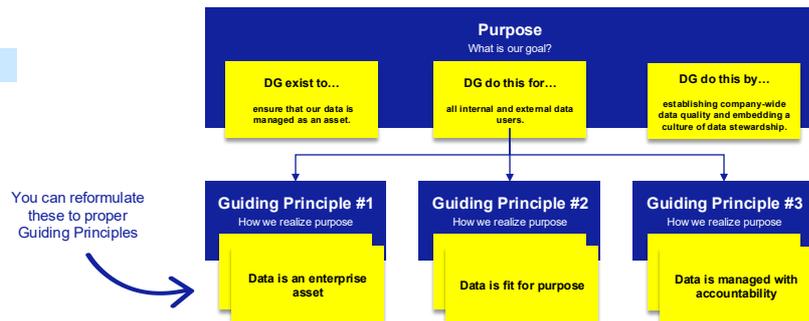
# WEEK 1 of 5

## Workshop 1 of 7 | Guiding Principles

### Step 6: Bringing it all Together

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

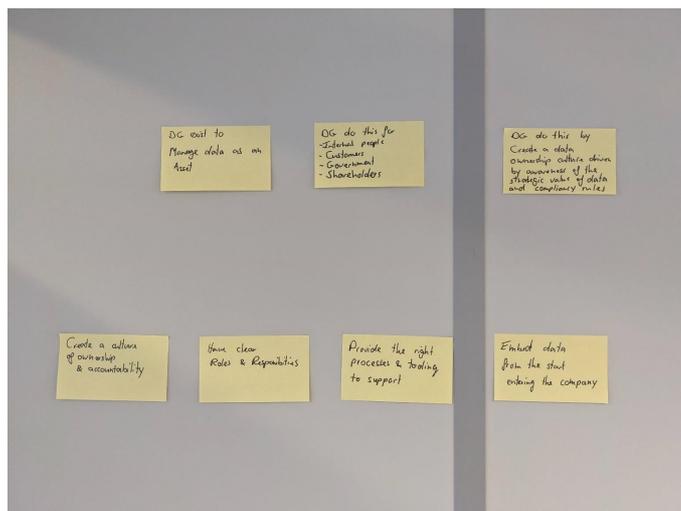
- **Timing:** 1 minute
- Put both the revisualized Purpose Sentence and the Guiding Principles together to get a good overview.



# WEEK 1 of 5

## Workshop 1 of 7 | Guiding Principles

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



# WEEK 1 of 5

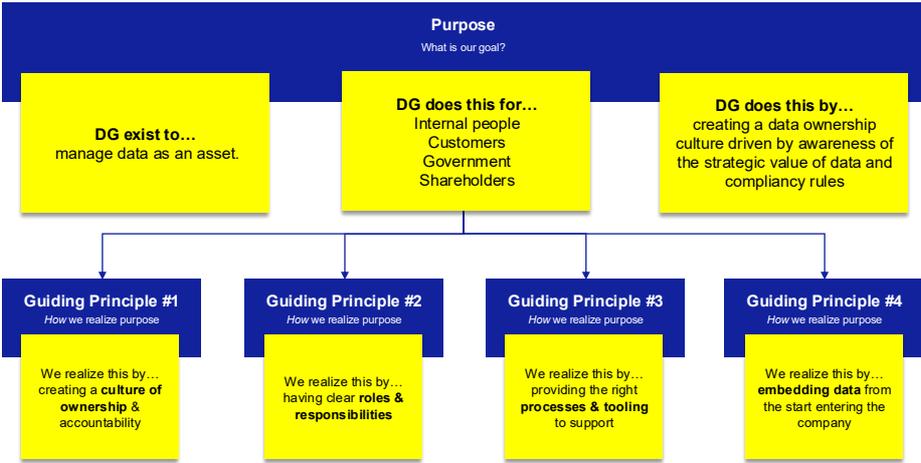
## Workshop 1 of 7 | Guiding Principles

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



# WEEK 1 of 5

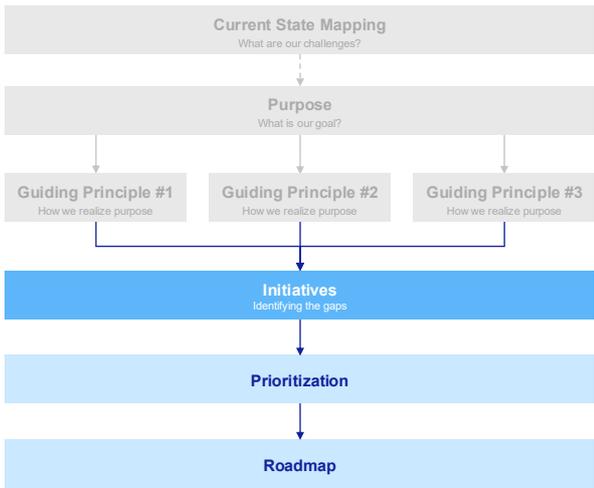
## The Fundamentals | Workshop 1 of 7



# Week 1



## Data Governance SPRINT™



Workshop #1  
*Understanding "As Is" and defining "To Be"*

Workshop #2  
*Bridges to Governance*

## WEEK 1 of 5

### The Fundamentals | Workshop 2 of 7

#### Exercise 1. 10 for 10 Brainstorm

Exercise 2. Action Board

Exercise 3. Action Steps

Exercise 4. Roadmap

Exercise 5. CDE Shortlist

Let's kick off our creative engines with the 10 for 10 Brainstorm! This exercise is all about generating a wide range of ideas to **bridge the gap** between our current state and the future vision for data governance.

In this session, we'll draw inspiration from our Purpose, Guiding Principles, and the focus areas identified in our Challenges Map. The aim is to come up with **as many ideas as possible**—whether they seem practical or far-fetched, all ideas are welcome!

Why is this important? Because the more ideas we generate, the more likely we are to uncover innovative solutions that will propel us forward.

## WEEK 1 of 5

### Workshop 2 of 7 | 10 for 10 Brainstorm

#### 1. Timing

Between 15 to 20 minutes

2. What you'll need

3. Introducing the exercise

4. Flow

## WEEK 1 of 5

### Workshop 2 of 7 | 10 for 10 Brainstorm

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 1 of 5

### Workshop 2 of 7 | 10 for 10 Brainstorm

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- The exercise is a rapid brainstorming session aiming to **generate 10 ideas** in 5 minutes on how we can achieve our desired future state for data governance and address the key challenges identified earlier.
- Participants get a **short amount of time** to write down lots of ideas.
- Don't worry about the quality of the ideas, just the **quantity!** We'll refine and prioritize these ideas in later exercises, so don't hold back—let your imagination run wild!
- In the second part of the workshop, participants will curate and select the stronger ideas.
- Only one idea per sticky note!

# WEEK 1 of 5

## Workshop 2 of 7 | 10 for 10 Brainstorm

### Step 1: Generate Ideas

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Each participant should write down 10 ideas—one per sticky note—related to improving data governance, overcoming challenges, and aligning with our Purpose and Guiding Principles.
- Focus on generating a **wide variety of ideas**, from the simple and practical to the bold and innovative.
- Keep the ideas brief and to the point; we'll dive deeper into them later.

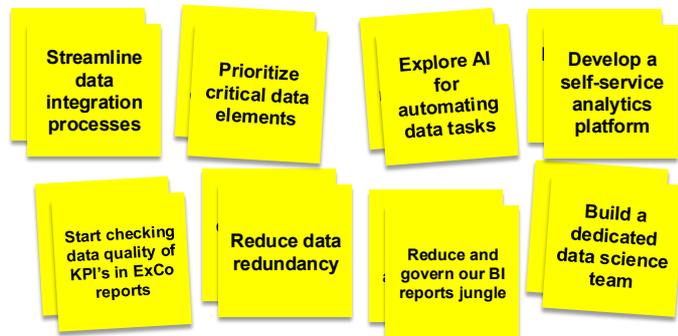
# WEEK 1 of 5

## Workshop 2 of 7 | 10 for 10 Brainstorm

### Step 1: Generate Ideas

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- Make sure to prepare **some examples!**



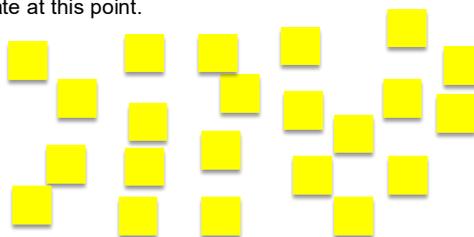
# WEEK 1 of 5

## Workshop 2 of 7 | 10 for 10 Brainstorm

### Step 2: Visualize Ideas

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Ask participants to stick their ideas on the designated wall.
- Don't categorize the ideas at this stage—just get them all up there.
- Quickly remove any obvious **duplicates**, but avoid discussion or debate at this point.



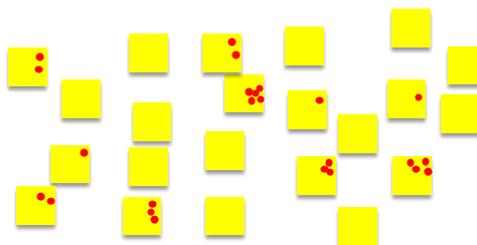
# WEEK 1 of 5

## Workshop 2 of 7 | 10 for 10 Brainstorm

### Step 3: Heatmap Vote

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Give every participant **10 voting dots**.
- Let them **silently vote** on the ideas they like the most – avoid discussions.
- Tell them that there are **no voting rules**.



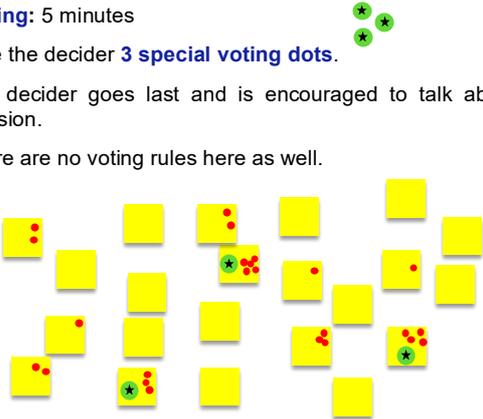
# WEEK 1 of 5

Workshop 2 of 7 | 10 for 10 Brainstorm

## Step 4: Decider Vote

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 5 minutes
- Give the decider **3 special voting dots**.
- The decider goes last and is encouraged to talk about their decision.
- There are no voting rules here as well.



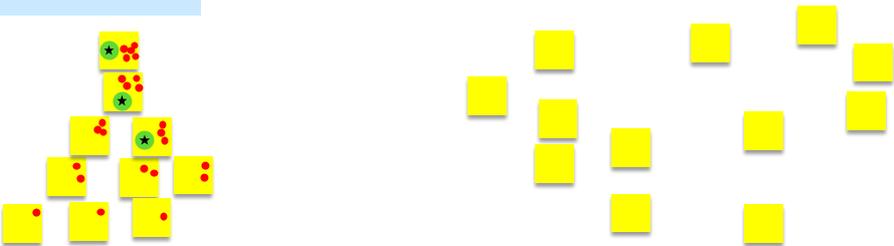
# WEEK 1 of 5

Workshop 2 of 7 | 10 for 10 Brainstorm

## Step 5: Revisualize

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

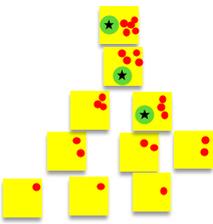
- **Timing:** 1 minute
- Take the **top 10 ideas** with votes on them off the wall.
- Place the ideas in order of most votes next to the wall.



# WEEK 1 of 5

## Workshop 2 of 7 | 10 for 10 Brainstorm

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



# WEEK 1 of 5

## The Fundamentals | Workshop 2 of 7

- Exercise 1. 10 for 10 Brainstorm
- Exercise 2. Action Board
- Exercise 3. Action Steps
- Exercise 4. Roadmap
- Exercise 5. CDE Shortlist

Welcome to our Action Board exercise, where we'll take all the great ideas generated during the 10 for 10 Brainstorm and **prioritize** them based on their **impact and feasibility**.

The Action Board is a powerful tool that helps us focus on what really matters—those initiatives that will drive the most significant change with the least amount of effort. By the end of this exercise, we'll have a clear understanding of which ideas we should tackle first and which ones may require more time and resources.

Why is this important? Because prioritization is key to ensuring that our efforts are directed toward the **most valuable and achievable goals**. This process will help us create a realistic and actionable roadmap that aligns with our data governance objectives.

# WEEK 1 of 5

## Workshop 2 of 7 | Action Board

### 1. Timing

Between 20 to 30 minutes

- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

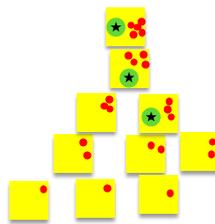
# WEEK 1 of 5

## Workshop 2 of 7 | Action Board

### 1. Timing

### 2. What you'll need

- 3. Introducing the exercise
- 4. Flow



Our 10 great ideas from the 10 for 10 Brainstorm exercise



## WEEK 1 of 5

### Workshop 2 of 7 | Action Board

1. Timing
2. What you'll need

#### 3. Introducing the exercise

4. Flow

- The objective of the Action Board is to prioritize the ideas generated during the 10 for 10 Brainstorm by assessing their potential impact and the effort required to **implement** them.
- **“Impact”** refers to the potential benefit or value that an idea will bring to your company, aligning with your purpose and business objectives. High-impact ideas are those that will significantly contribute to achieving these goals and driving the organization forward.
- **“Effort”** represents the amount of work, resources, and time required to implement an idea. Low-effort ideas are easier and quicker to execute, while high-effort ideas may take more time, resources, and planning.

## WEEK 1 of 5

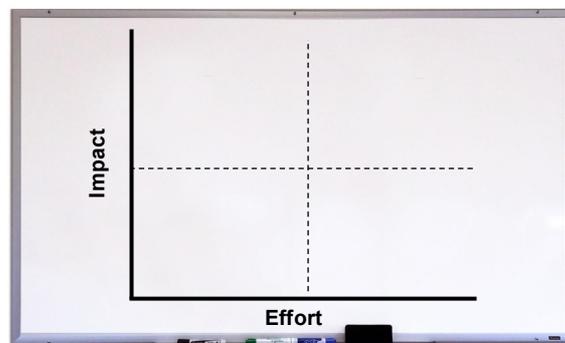
### Workshop 2 of 7 | Action Board

1. Timing
2. What you'll need

#### 3. Introducing the exercise

4. Flow

- Start the exercise by drawing an **“Impact” Y-axis** and **“Effort” X-axis** and the **quadrants** on a whiteboard or flipchart.



# WEEK 1 of 5

## Workshop 2 of 7 | Action Board

### Step 1: Assess Impact

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 8 minutes
- The Facilitator takes each selected sticky note from the 10 for 10 Brainstorm **one by one** and places it in the center of the Action Board.
- Participants will indicate whether each idea should be placed higher or lower on the Impact scale, simply by saying “**higher**” or “**lower**”—no further discussion at this stage.
- The goal is to position each idea along the Y-axis based on its perceived impact. It's okay if some sticky notes overlap at this point.

# WEEK 1 of 5

## Workshop 2 of 7 | Action Board

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



### Step 2: Assess Effort

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 8 minutes
- Now, we'll repeat the process, but this time we'll focus on the Effort axis.
- Participants will again provide input, this time by saying “left” or “right” - indicating whether an idea requires more or less effort to implement. Low effort can be hours or days, while high effort can be months or years.
- The facilitator will move each sticky note **one by one** along the X-axis accordingly.
- Assure participants that the goal is not to be 100% accurate but to get a **general sense of effort** required.

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



# WEEK 1 of 5

Workshop 2 of 7 | Action Board

## Step 3: Review Quadrants

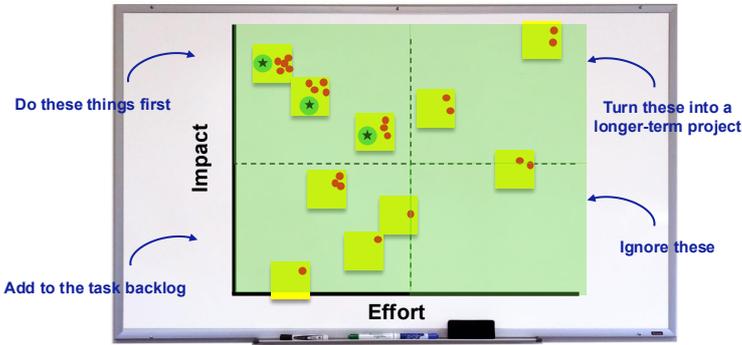
- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 4 minutes
- Each quadrant has a **meaning** on the Action Board. Present these to the participants so they have a clear understanding of how the board has helped them prioritize their work.
  - **Top Left** (High Impact, Low Effort): Focus on these ideas first—they are the “quick wins.”
  - **Top Right** (High Impact, High Effort): Plan these ideas as longer-term projects.
  - **Bottom Left** (Low Impact, Low Effort): Add these to a task backlog—address them as resources allow.
  - **Bottom Right** (Low Impact, High Effort): Consider ignoring these ideas for now, as they may not be worth the investment.

# WEEK 1 of 5

Workshop 2 of 7 | Action Board

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow





# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps

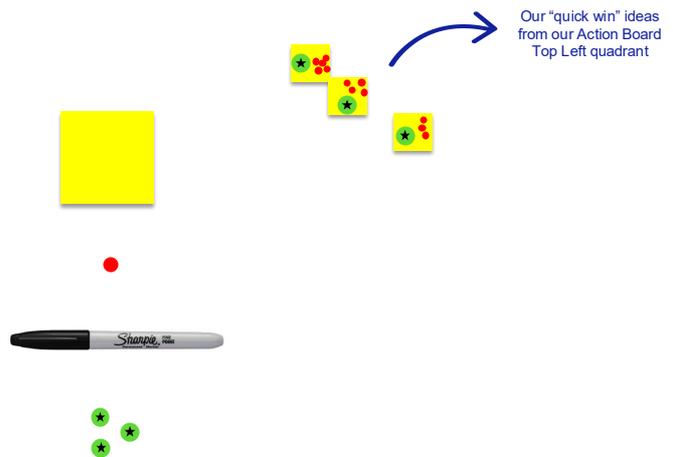
- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

Between 45 to 60 minutes

# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



## WEEK 1 of 5

### Workshop 2 of 7 | Action Steps

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of this exercise is to transform the **top “quick win” ideas** from the Action Board into actionable steps as a preparation for a full action plan.
  - We'll focus on **one “quick win” at a time**, creating a **task flow** that outlines the key steps needed for implementation.
  - This exercise turns concepts into concrete actions, ensuring that our ideas lead to real, impactful change in our data governance efforts.

## WEEK 1 of 5

### Workshop 2 of 7 | Action Steps

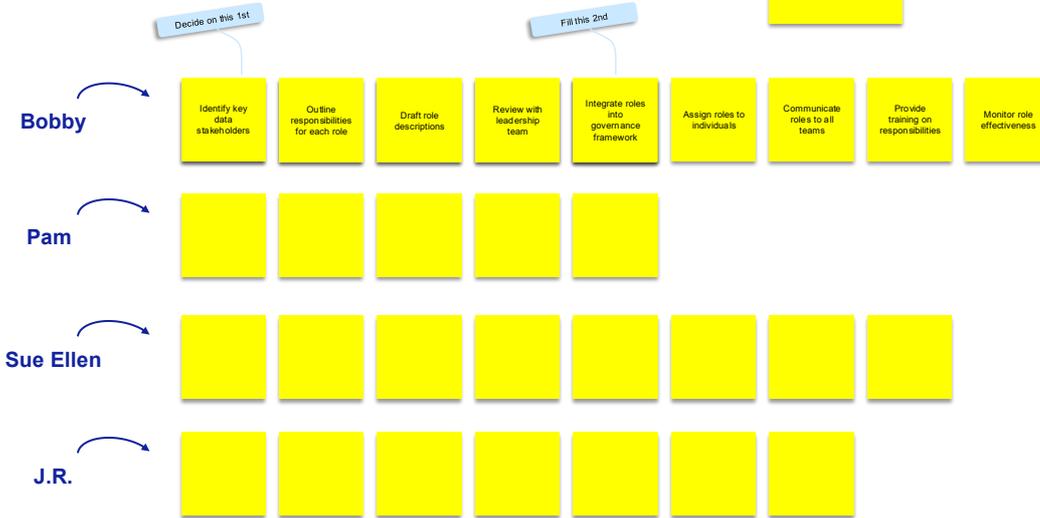
1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- #### Step 1: Generate Task Flows
- **Timing:** 10 minutes per “quick win” idea
  - Focus on one “quick win” idea at a time.
  - Each participant should think of **every step** that needs to be taken to make the idea happen.
  - Write each step on a sticky note and place it horizontally, creating a task flow. Keep in mind: one step per sticky note!
  - Ensure that the steps are **sequential and logical**, covering everything from initiation to completion.

Bobby



# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps



# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps

### Step 2: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute per person
- Each participant presents their task flow to the group, giving a **general overview** without getting into too much detail.
- Stick all the task flows on the wall so everyone can see them together.
- There should be **no discussion** or debate at this stage—just present the ideas.



# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps

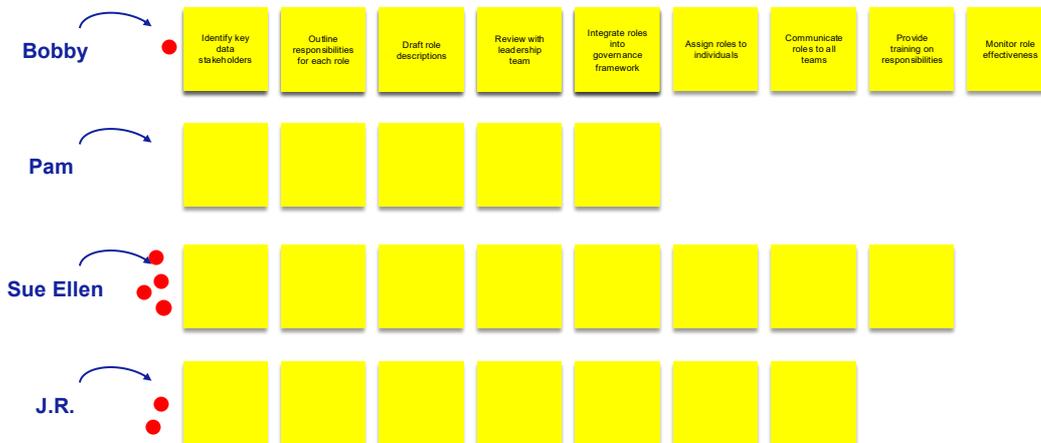
### Step 3: Voting

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Give each participant **one voting dot**.
- Participants should place their dot on the **ONE task flow** they believe is the most effective and actionable for the specific "quick win" idea and will move us closer to achieving our data governance goals and purpose.
- Encourage participants to consider both the **completeness and practicality** of the task flow.

# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps



# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

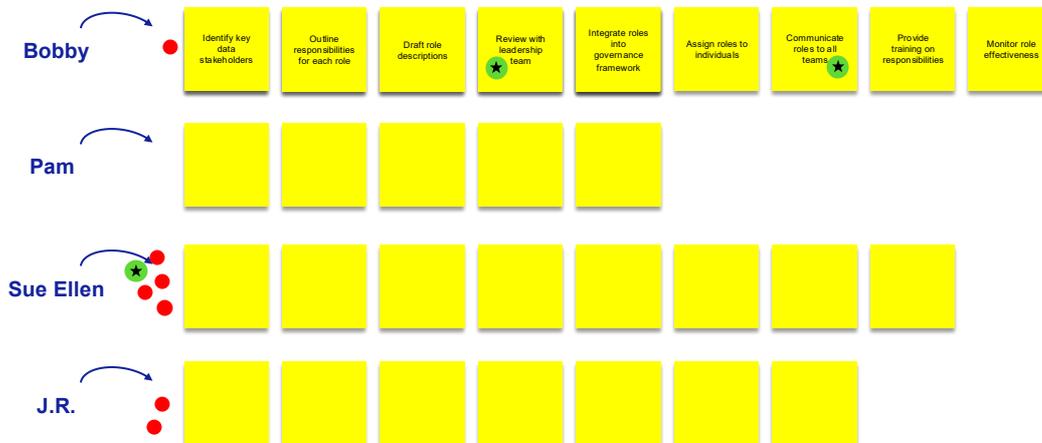
### Step 4: Decider Vote



- **Timing:** 3 minutes
- Then, the Decider decides which Task Flow is most complete by placing **one special voting dot** next to that one task flow.
- The Decider may choose to incorporate elements from other task flows into the selected one to ensure it is as robust as possible, by **adding additional voting dots** to those specific elements.

# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps



# WEEK 1 of 5

## Workshop 2 of 7 | Action Steps

### Step 5: Reorganize

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 2 minutes
- Reorganize the chosen task flow on the wall, adding any extra steps selected by the Decider.
- This finalized task flow will guide the implementation of the "quick win" initiative.
- **Repeat this process** for each selected "quick win" idea to ensure all prioritized initiatives have a clear and actionable task flow.



# WEEK 1 of 5

## The Fundamentals | Workshop 2 of 7

- Exercise 1.** 10 for 10 Brainstorm
- Exercise 2.** Action Board
- Exercise 3.** Action Steps
- Exercise 4.** Roadmap
- Exercise 5.** CDE Shortlist

Let's hit the road, Jack! In this Roadmap exercise we'll take the prioritized initiatives and their corresponding task flows and strategically place them on a timeline.

This exercise is critical because it transforms our ideas and plans into a **clear, actionable roadmap** that outlines when and how each initiative will be implemented.

By the end of this session, we'll have a comprehensive plan that not only reflects our data governance goals but also aligns with the organization's overall strategy and priorities.

Why is this important? Because having a well-structured roadmap ensures that our efforts are organized, realistic, and geared toward **achieving tangible results** within a defined timeframe. This roadmap will serve as our guide, helping us maintain momentum and focus as we move forward with our Data Governance Sprint.

# WEEK 1 of 5

## Workshop 2 of 7 | Roadmap

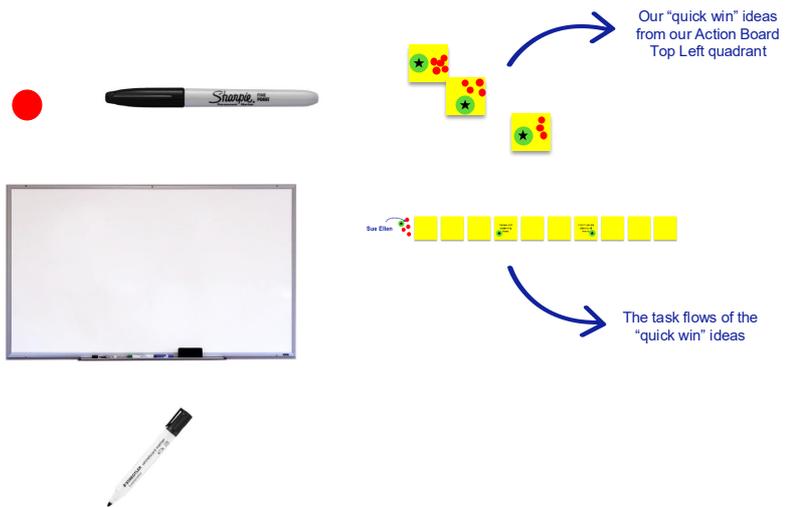
- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

Between 30 to 60 minutes

# WEEK 1 of 5

## Workshop 2 of 7 | Roadmap

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



# WEEK 1 of 5

## Workshop 2 of 7 | Roadmap

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of this exercise is create a **detailed roadmap** that schedules the implementation of each "quick win" initiative with its respective task flow.
  - We'll determine the **best timing** for each initiative, considering dependencies and priorities.
  - We'll also identify **key milestones** to track progress and ensure that the initiatives stay on track.
  - A clear roadmap turns plans into action, ensuring that our data governance initiatives are implemented in a structured, strategic manner.

# WEEK 1 of 5

## Workshop 2 of 7 | Roadmap

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- First draw out a roadmap on a whiteboard or flipchart, depending on the timeline.
  - Keep the roadmap **super simple!**

December	Jan	Feb	9 – 12 months	12+ months



# WEEK 1 of 5

## Workshop 2 of 7 | Roadmap

### Step 2: Set Key Milestones

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

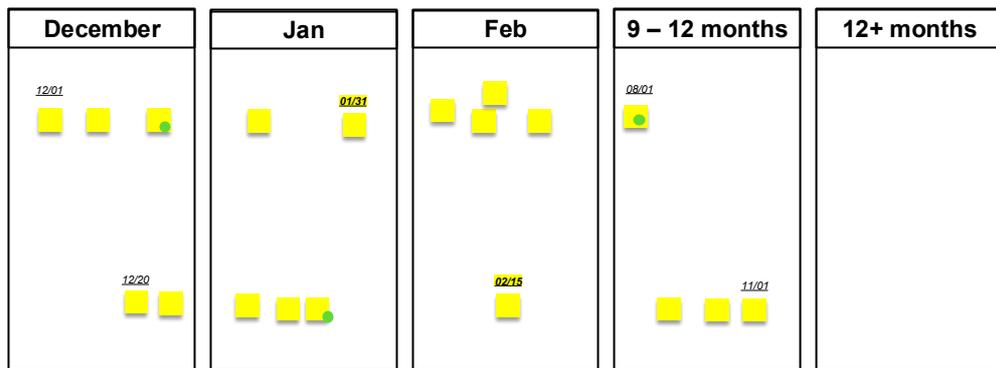
- **Timing:** 10 minutes
- For each initiative, determine key milestones that indicate **significant progress or completion** of major tasks.
- Place these milestones on the roadmap, ensuring they are spaced appropriately and aligned with the overall timeline.
- Adjust the placement as necessary to prevent overlaps or resource conflicts.

# WEEK 1 of 5

## Workshop 2 of 7 | Roadmap

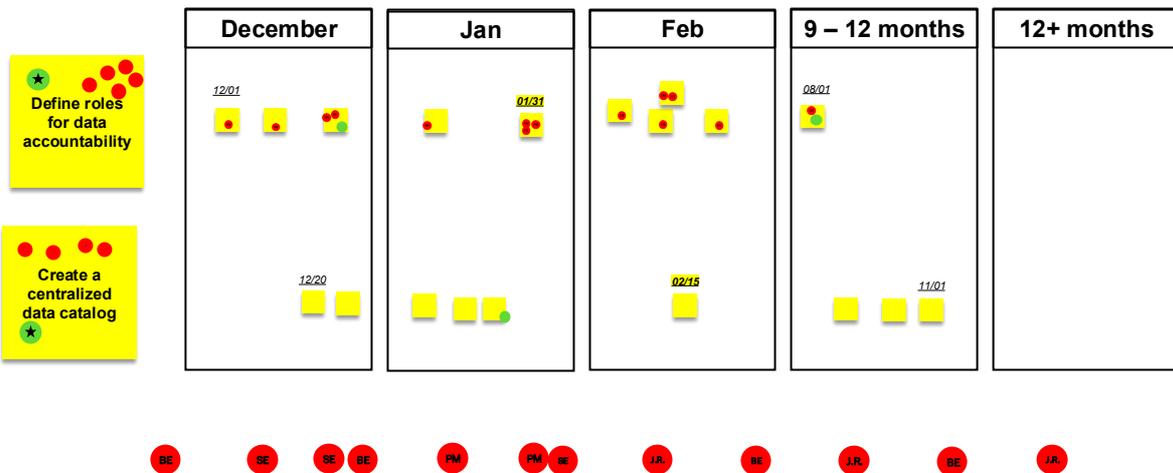
★ Define roles for data accountability

Create a centralized data catalog ★



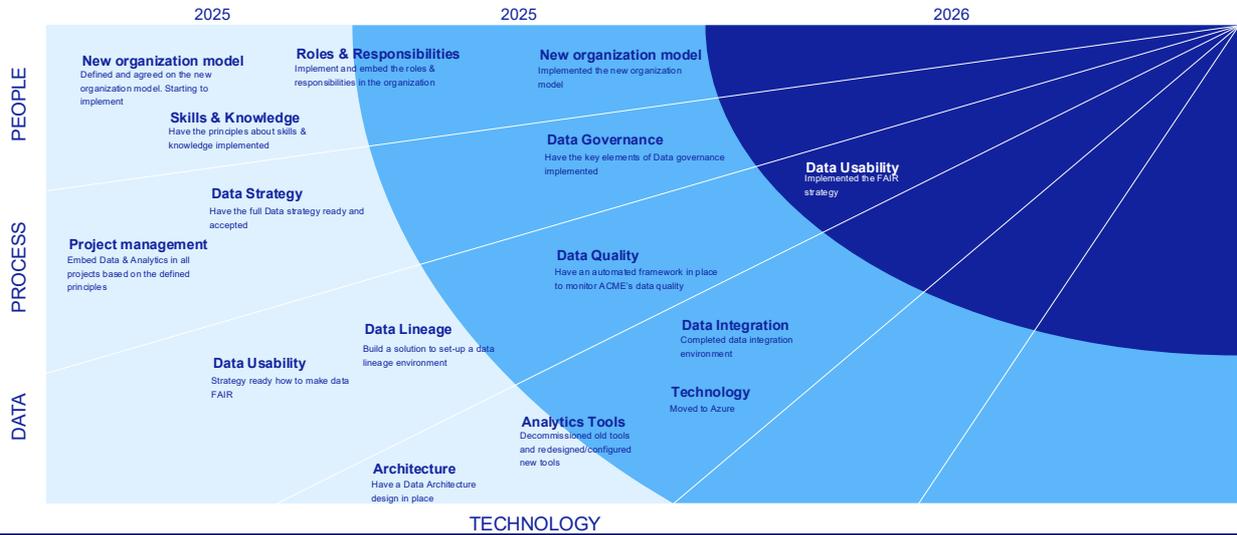
**Step 3: Accountability Assigner**

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 10 minutes BE
  - Ask people to **assign tasks to themselves** with a dot with their initials on.
  - Some steps can have multiple people assigned.



# WEEK 1 of 5

## Workshop 2 of 7 | Roadmap



# WEEK 1 of 5

## The Fundamentals | Workshop 2 of 7

**Exercise 1.** 10 for 10 Brainstorm

**Exercise 2.** Action Board

**Exercise 3.** Action Steps

**Exercise 4.** Roadmap

**Exercise 5.** CDE Shortlist

Welcome to the final exercise of our workshop, the **Critical Data Element (CDE) Shortlist**. In this session, we'll focus on identifying and prioritizing the most important data elements within our organization.

By narrowing down our focus to the top 10 CDEs, we lay the foundation for effective data governance, enabling us to make fast progress and **demonstrate value quickly**.

These CDEs will later be central to our prototyping phase, where we'll conduct data quality assessments and define these elements in our business glossary. For now, our goal is to identify and select these key data elements that are crucial to our organization's success.

# WEEK 1 of 5

Workshop 2 of 7 | CDE Shortlist

1. Timing

Between 15 to 20 minutes

- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

# WEEK 1 of 5

Workshop 2 of 7 | CDE Shortlist

1. Timing

2. What you'll need

- 3. Introducing the exercise
- 4. Flow



## WEEK 1 of 5

### Workshop 2 of 7 | CDE Shortlist

1. Timing

2. What you'll need

3. Introducing the exercise

4. Flow

- Our aim is to generate a comprehensive list of potential CDEs through a **10 for 10 brainstorm**.
- The goal is to identify **10 critical data elements** within 5 minutes.
- Participants will have a brief period to quickly write down as many CDEs as possible—focus on **quantity**, not quality!
- In the second part of the workshop, we'll use heatmap voting and a decider vote to select the top 10 most critical data elements that will be the focus of our prototyping efforts.
- Remember, each sticky note should contain only one CDE!

## WEEK 1 of 5

### Workshop 2 of 7 | CDE Shortlist

1. Timing

2. What you'll need

3. Introducing the exercise

4. Flow

#### Step 1: Identify CDEs

- **Timing:** 5 minutes
- Each participant should identify 10 potential CDEs, writing each on a separate sticky note.
- Focus on data elements that are vital to business processes, decision-making, or regulatory compliance.
- Keep the CDEs brief and to the point; we'll dive deeper into them later.

# WEEK 1 of 5

## Workshop 2 of 7 | CDE Shortlist

### Step 1: Identify CDEs

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- Make sure to prepare **some examples!**



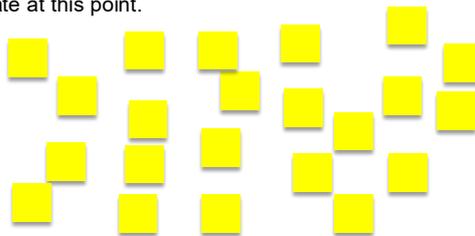
# WEEK 1 of 5

## Workshop 2 of 7 | CDE Shortlist

### Step 2: Visualize CDEs

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Ask participants to stick their CDEs on the designated wall.
- Don't categorize the CDEs at this stage—just get them all up there.
- Quickly remove any obvious **duplicates**, but avoid discussion or debate at this point.



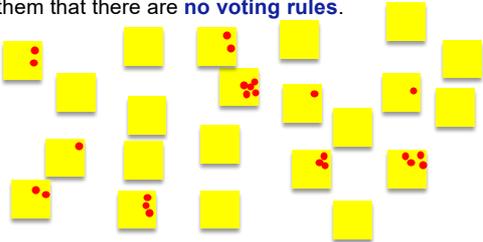
# WEEK 1 of 5

Workshop 2 of 7 | CDE Shortlist

### Step 3: Heatmap Vote

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 5 minutes 
- Give every participant **10 voting dots**.
- Participants should place their dots on the CDEs they believe are the **most critical**. Encourage participants to distribute their dots based on the importance and impact of each CDE.
- Tell them that there are **no voting rules**.



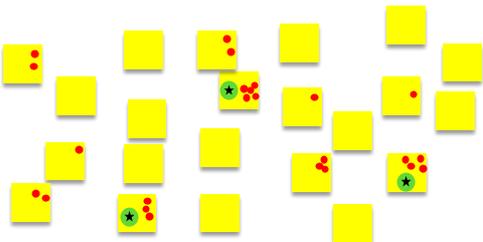
# WEEK 1 of 5

Workshop 2 of 7 | CDE Shortlist

### Step 4: Decider Vote

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 5 minutes 
- Give the decider **3 special voting dots**.
- The decider goes last and is encouraged to talk about their decision.
- There are no voting rules here as well.



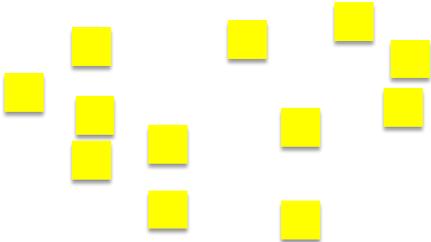
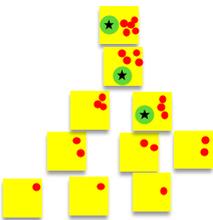
# WEEK 1 of 5

Workshop 2 of 7 | CDE Shortlist

## Step 5: Revisualize

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 1 minute
- Take the **top 10 CDEs** with votes on them off the wall.
- Place the CDEs in order of most votes next to the wall.

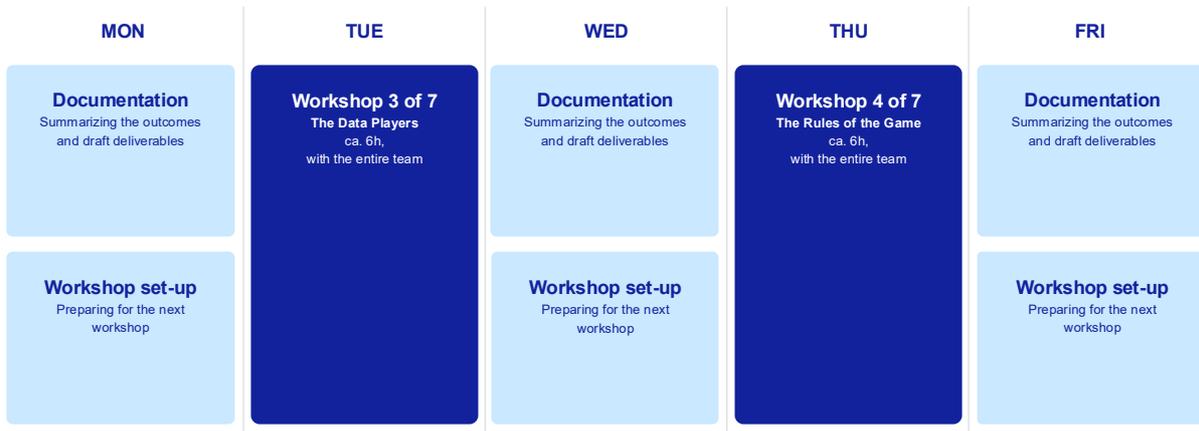


# Week 2

1 Monday	2 Tuesday	3 Wednesday	4 Thursday	5 Friday
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## WEEK 2 of 5

### The Data Players | The Rules of the Game



## WEEK 2 of 5

### The Data Players | The Rules of the Game

#### Welcome to Week 2: Building the Data Governance Framework

In Week 2, we transition from strategic visioning to the practical development of your **data governance framework**. This week is dedicated to defining the key roles, responsibilities, and operating models that will drive your data governance efforts, as well as establishing the foundational processes for managing your Critical Data Elements (CDEs).

Through two targeted workshops, we'll develop clear, actionable deliverables that will ensure your data governance structure is both **robust and sustainable**. By the end of this week, you'll have a well-defined framework that aligns with your organization's goals and prepares you for the next steps in your data governance journey.

# Week 2



## WEEK 2 of 5 The Fundamentals | Documentation

The Documentation phase on Monday is all about taking the raw insights and outcomes from The Fundamentals workshops in Week 1 and transforming them into **polished, actionable documents**.

This is where we clean up the rough edges, organize our thoughts, and create professional artifacts that will guide our ongoing data governance efforts. The goal is to **consolidate** everything we've learned into clear, concise deliverables that can be easily communicated and implemented across the organization.

### Clean Up the Challenge Map

- Organize and refine the challenge map, ensuring that it accurately reflects the key challenges and opportunities identified during the workshops.

### Draft the Data Governance Charter

- Start drafting a Data Governance Charter that includes the purpose (vision) and guiding principles, providing a foundational document that guides all future governance activities.

### Finalize the Action Board

- Polish the action board by clearly defining the prioritized initiatives and their associated task flows.

### Create a Fancy Roadmap

- Develop a visually appealing and clear roadmap that outlines the timeline and milestones for implementing the prioritized initiatives.

### Compile a Concise List of Use Cases and CDEs

- Summarize the top use cases and critical data elements (CDEs) identified during the workshops, creating a clear focus for the next phases.

## WEEK 2 of 5

### The Data Players | Workshop Set-up

Effective preparation is crucial for a productive workshop. This week, we'll focus on setting up the environment and materials for the upcoming workshops: The Data Players and The Rules of the Game.

By prepopulating templates and preparing the necessary tools, we'll ensure that each session runs smoothly and that we can maximize our time together.

#### Reserve Workshop Space

- Secure the dedicated (War) room and necessary materials for Workshops 3 and 4, ensuring the environment is conducive to collaboration.

#### Test Technology

- Ensure all technology, such as projectors and collaboration tools, is tested and ready to minimize disruptions.

## Week 2

1

Monday

2

Tuesday

3

Wednesday

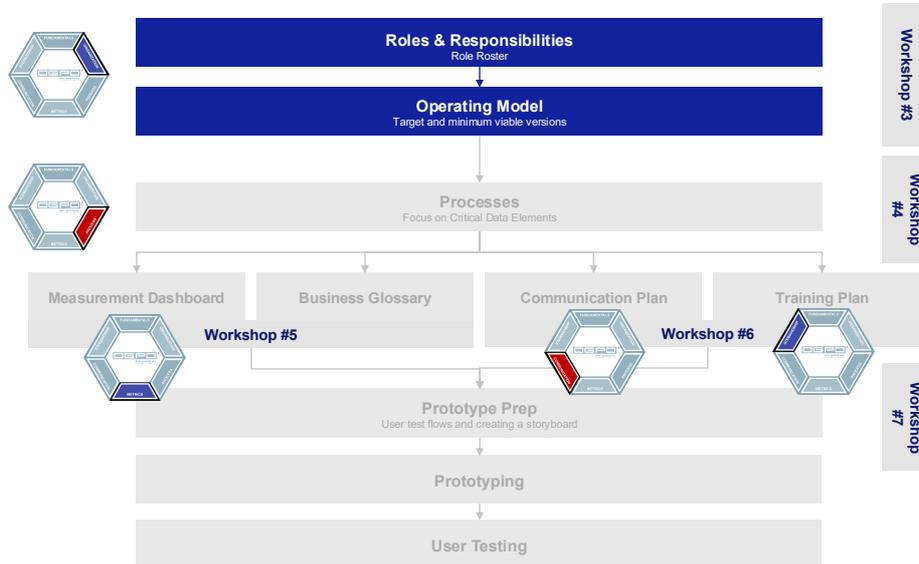
4

Thursday

5

Friday

# Data Governance SPRINT™



## WEEK 2 of 5

### The Data Players | Workshop 3 of 7

#### The Data Players Workshop: Defining Responsibilities, Roles, and the Operating Model

Workshop 3 is where we begin to shape the structural backbone of your data governance program by defining the key responsibilities, roles, and operating model that will drive your efforts forward. In this session, we'll start by envisioning the **target version** of these roles and the operating framework—how we want it to look and function ideally within the next 2 to 4 years to fully support our data governance purpose.

However, recognizing the need for immediate, actionable steps, we'll also develop a **minimum sustainable version\*** of the roles and operating model. This scaled-down version will focus specifically on what's needed to support our Critical Data Elements (CDEs) during the prototype and testing phase. By balancing ambition with practicality, we ensure that we can start implementing effective governance quickly, while still working towards the more comprehensive, long-term structure.

##### Workshop 3: Tuesday Full-Day

- Focus on defining the roles and responsibilities within your data governance framework.
- Identify and align on key roles such as data stewards, data owners, and data custodians.
- Develop both the target and minimum sustainable versions of your operating model, aligning them with your data governance vision.
- Work through four key exercises: Responsibility Mapping, Lightning Demos, Concept Creation, and Role Roster.

\* The concept of a "minimum sustainable version" comes from John Ladley and First San Francisco Partners.

## WEEK 2 of 5

### The Data Players | Workshop 3 of 7

#### Exercise 1. Responsibility Mapping

#### Exercise 2. Lightning Demos

#### Exercise 3. Concept Creation

#### Exercise 4. Roles Roster

In this exercise, we'll embark on a journey to uncover and define the **key responsibilities** that are essential for achieving our data governance vision.

Rather than starting with predefined roles, we'll focus first on identifying **what needs to be done**—what are the crucial tasks, decisions, and accountabilities that will drive our success?

By mapping these responsibilities, we'll then naturally evolve into **defining the roles** that will carry them out. This approach ensures that our roles are rooted in the real needs of our organization, making our data governance framework both practical and impactful.

## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### 1. Timing

Between 1 to 2 hours

#### 2. What you'll need

#### 3. Introducing the exercise

#### 4. Flow

## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- The objective of this exercise is to identify and map the **key responsibilities** required to achieve our data governance purpose and objectives.
- This exercise will help define the specific roles within the organization by **mapping responsibilities to roles**.
- The exercise will culminate in identifying the top-voted roles and responsibilities that are crucial for **supporting the target state**.

## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### Step 1: Responsibility Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 minutes
- Distribute a set of **Data Responsibility Cards**® to each participant (or a subset if sharing a single deck).
- If the deck isn't available, you can print out the necessary templates—see the [resources section](#) for details.
- Each participant will individually map out the responsibilities they believe are essential to achieving the **target version** of our data governance purpose, ensuring alignment with our roadmap.
- Encourage participants to concentrate on **key responsibilities**, aiming to limit their selection to a **maximum of 20 cards**.
- Prompt participants to think broadly about the actions required to support effective data governance.

## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### Step 1: Responsibility Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- For **each participant**, this could look like this for example:

Is the authority for decisions about data (and data needs) within his/her subject area	Provide technical support for ensuring data quality	Identifying and documenting regulatory and legal/risk issues	Trains, educates, and creates awareness for members in their respective functional areas	Approves funding, budget and resource allocation for strategic data projects
Promote data literacy across the organization by providing training and resources on data handling	Is accountable for the proper execution of the data policies and the day-to-day execution of data management	Establish and enforce data quality standards to ensure that the data is accurate, complete, and reliable	Identifying and classifying data access levels	Monitor and measure the quality of data against defined standards and metrics
Ensures strategic alignment with corporate objectives and other business unit initiatives	Oversees data privacy policies and procedures, ensuring compliance.	Assist in the development of reports and dashboards by providing accurate and relevant data	Responsible for communicating program components and value to organization	Maintain detailed documentation for data elements, including definitions, formats, and usage guidelines

## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



### Step 2: Present

- **Timing:** 2 minutes per person
- Each participant **briefly presents** the responsibilities they've selected.
- As participants present, they place their Data Responsibility Cards© in the center of the table where everyone can easily see them.
- Keep the presentations brief and **avoid debates** at this stage—this is about sharing, not discussing.
- As each responsibility is presented, the facilitator will stack or **remove duplicates**, ensuring a clean set of unique responsibilities.

## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

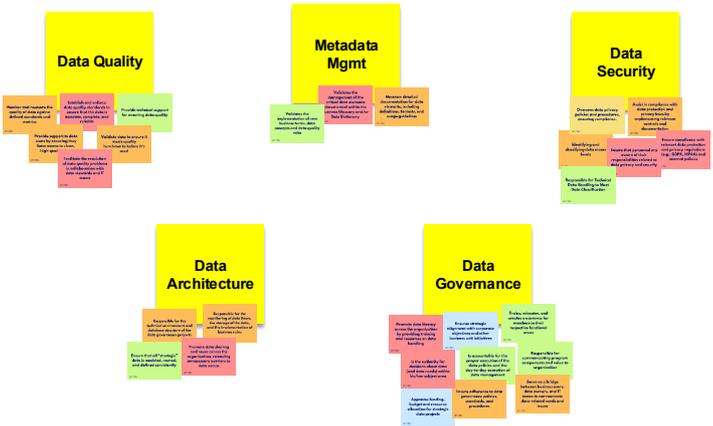
### Step 3: Domain Grouping

- **Timing:** 10 minutes
- The facilitator will guide a focused, **time-boxed discussion** to categorize the presented responsibilities into **broader data management domains** (e.g., Data Quality, Data Security, Data Integration). We do to ensure that we consider the comprehensive management of data assets across all relevant data knowledge areas.
- Participants will collaboratively organize the Data Responsibility Cards© in the center of the table based on the data domains they identify.
- **Label each group** with a sticky note indicating the respective domain, placing it above the corresponding stack of cards.
- Keep the discussion streamlined and efficient, ensuring that responsibilities are logically grouped without delving into excessive detail.

**WEEK 2 of 5**  
Workshop 3 of 7 | Responsibility Mapping

**Step 3: Domain Grouping**

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

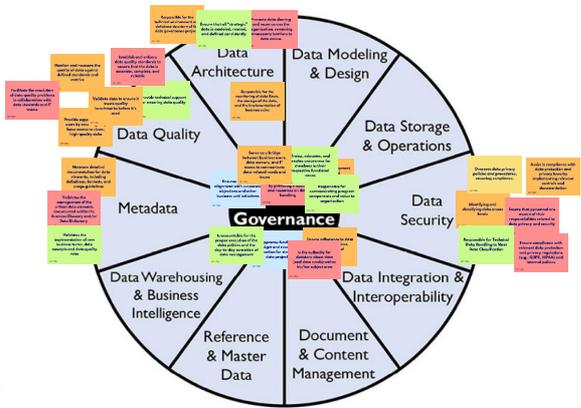


**WEEK 2 of 5**  
Workshop 3 of 7 | Responsibility Mapping

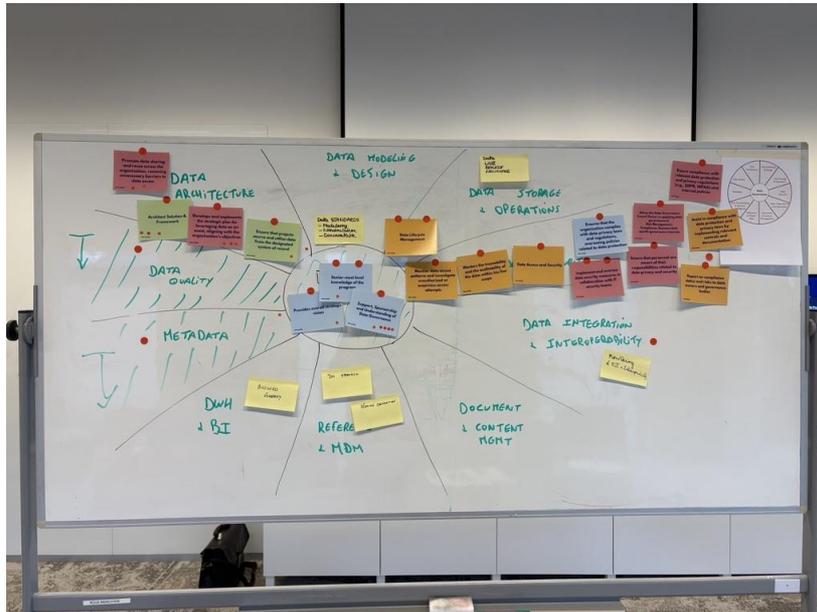
**Step 3: Domain Grouping**

- Alternatively, consider using a large printout of the **DAMA Wheel** (in A3 format) as a reference.

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



Source: DAMA-DMBOK2 Data Management Framework © 2017, DAMA International





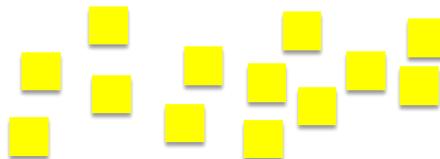
## WEEK 2 of 5

Workshop 3 of 7 | Responsibility Mapping

### Step 4: Responsibility Brainstorm

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Each participant should write down some **additional responsibilities** — one per sticky note— that may have been missed within the identified data management domains, or in domains not yet identified.
- Focus on generating a wide variety of responsibilities. Keep the responsibilities brief and to the point.



## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### Step 5: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minutes
- Ask participants to add their additional responsibilities to the respective group of data management domains.
- Quickly remove any obvious duplicates, but avoid discussion or debate at this point.



## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### Step 6: Role Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 20 minutes
- Now that responsibilities are grouped by domain, it's time to map each responsibility to a specific role using the **Data Role Cards**®.
- The participants work together to **assign each responsibility** to an appropriate **data role**.
- As the facilitator, **guide the group** to ensure balanced participation, helping them categorize responsibilities under the right roles, and ensuring clarity in the process.

# WEEK 2 of 5

## Workshop 3 of 7 | Responsibility Mapping

### Step 6: Role Mapping

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The Data Role Cards© are divided by **levels\*** (Support, Operational, Tactical, Strategic, Executive) to help streamline the discussion and ensure that roles are assigned appropriately.
    - **Executive:** Top-level leaders like CEOs and Presidents who make high-level decisions and set the overall direction for data governance.
    - **Strategic:** Senior leaders who are tasked with overseeing specific initiatives and ensuring that data governance strategies are successfully implemented.
    - **Tactical:** Subject matter experts and key decision-makers responsible for specific areas of data, making sure that data-related decisions align with the organization's goals.
    - **Operational:** All employees who interact with data in their daily work, ensuring that data is handled properly according to policies and standards.
    - **Support:** Teams that provide essential backing for the data governance program, including IT, Project Management, Compliance, and Legal, ensuring the smooth execution of data governance activities.

\*Source: Seiner, R. S. (2014). *Non-Invasive Data Governance: The Path of Least Resistance and Greatest Success*. Technics Publications.

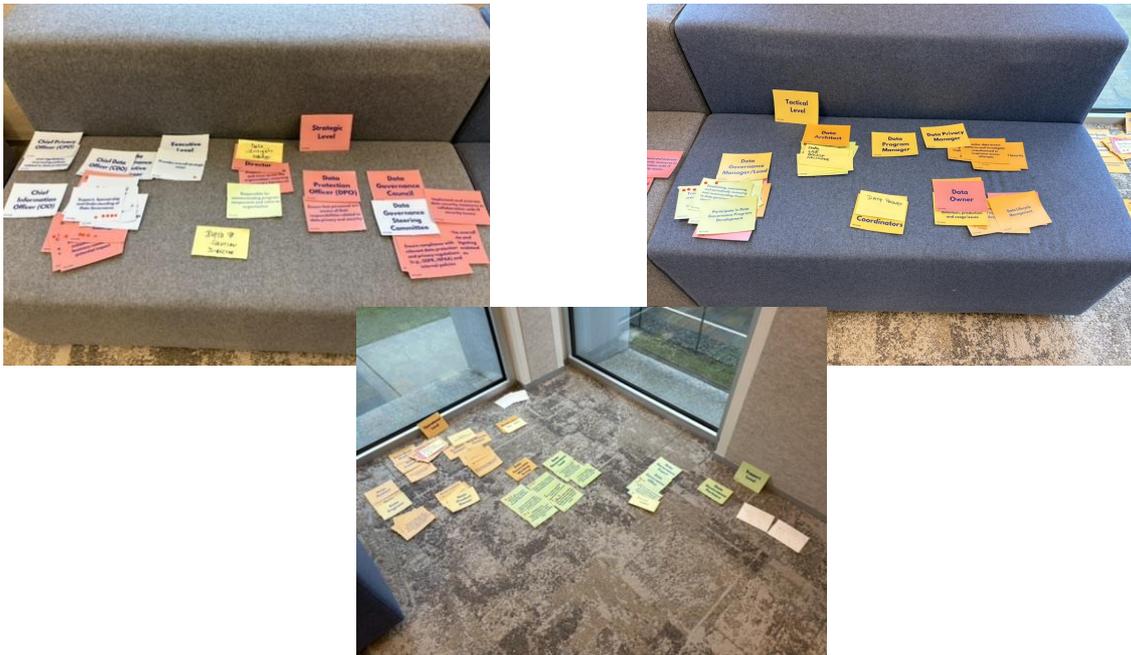
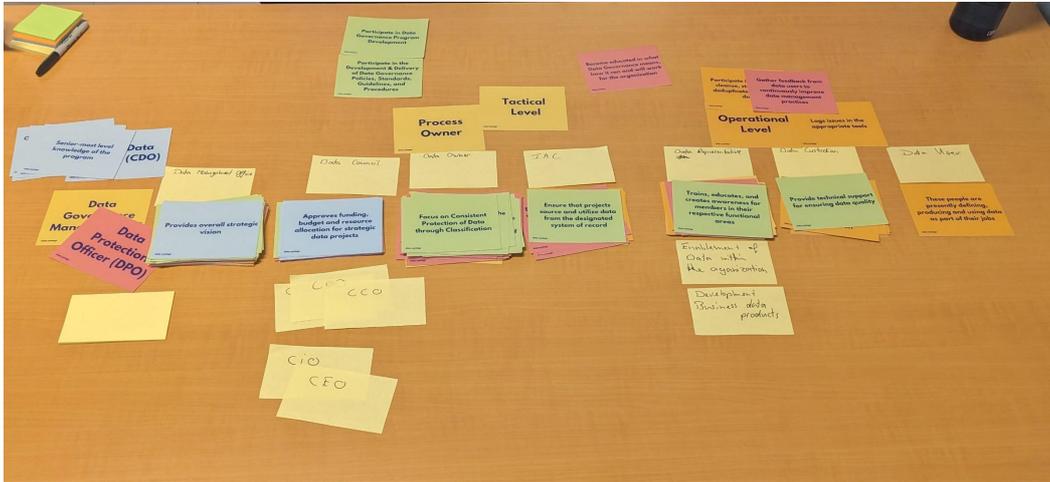
# WEEK 2 of 5

## Workshop 3 of 7 | Responsibility Mapping



# WEEK 2 of 5

## Workshop 3 of 7 | Responsibility Mapping



## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### Step 7: Heatmap Voting

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes ●●●●●
- Give every participant **10 voting dots**.
- Let them **silently vote** on the roles and responsibilities they believe are essential for achieving the data governance purpose and target state—avoid discussions.
- Tell them that there are **no voting rules**.



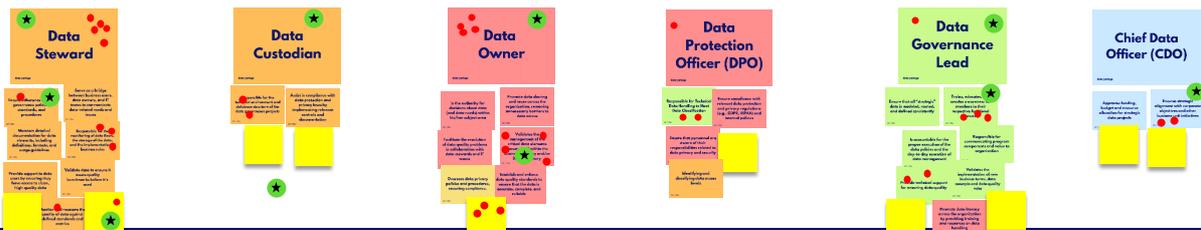
## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### Step 8: Decider Vote

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes ★ ★ ★ ★ ★
- Give the decider **10 special voting dots**.
- The decider will place special voting dots on the roles and responsibilities that they determine are most crucial to prioritize.
- The decider may choose to **move around responsibilities** from different roles, ensuring it aligns with the overall data governance purpose and strategic goals.



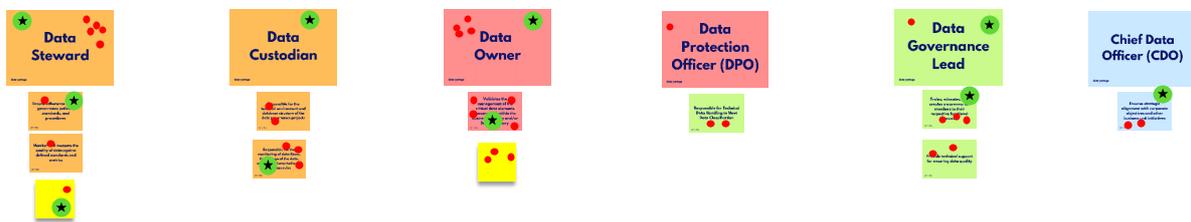
## WEEK 2 of 5

### Workshop 3 of 7 | Responsibility Mapping

#### Step 9: Revisualize

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Separate the top-voted roles and responsibilities from the rest of the stack.
- This will give us a **clear, high-level view** of the key roles and responsibilities.



## WEEK 2 of 5

### The Data Players | Workshop 3 of 7

**Exercise 1.** Responsibility Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

**Exercise 4.** Roles Roster

Now that we've identified and prioritized the key roles and responsibilities crucial to our data governance framework, it's time to explore how these elements will interact within an **effective operating model**.

This exercise is an inspiration-gathering exercise to stimulate creativity before concept creation and is aimed to **inspire creative and practical ideas** for structuring our data governance operating model.

This fast-paced, idea-generating session is designed to spark innovation by **showcasing different approaches** to data governance structures.

## WEEK 2 of 5

Workshop 3 of 7 | Lightning Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

Between 30 to 45 minutes

## WEEK 2 of 5

Workshop 3 of 7 | Lightning Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



# WEEK 2 of 5

## Workshop 3 of 7 | Lightning Demos

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- Ensure all participants have device access and internet connectivity.
  - The objective of this exercise is to search and explore a variety of **potential operating models** of other companies or resources.
  - Emphasize **learning from others' solutions**, not just copying them, to avoid reinventing the wheel.
  - These Lightning Demos will help us **identify key features and approaches** that can be adapted to create our very own robust data governance operating model.
  - Remind participants to **stay focused** on the task and resist distractions like checking emails or Teams messages.

# WEEK 2 of 5

## Workshop 3 of 7 | Lightning Demos

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- Show some real **examples** before the exercise starts.



**HOSPITAL**

**Big Idea:**  
A Data Governance Center of Excellence

**LARGE BANK**

**Big Idea:**  
Federated operating model with support structure

**COLLIBRA**

**Big Idea:**  
Centralized operating model with Data citizens

## WEEK 2 of 5

### Workshop 3 of 7 | Lightning Demos

#### Step 1: Search for Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 - 30 minutes
- Instruct participants to search online for examples of how other companies have defined their operating models or for operating models that they find inspiring.
- The examples do not need to be from the same industry or sector (e.g., fashion).
- By the end of this exercise, each participant should have **2-3 examples** ready to present, along with an explanation of what makes each one inspiring.
- For each Lightning Demo, ask participants to summarize the key concept on a rectangular sticky note, giving it a catchy title as well.

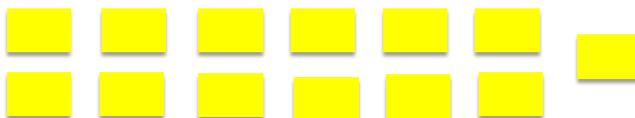
## WEEK 2 of 5

### Workshop 3 of 7 | Lightning Demos

#### Step 2: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

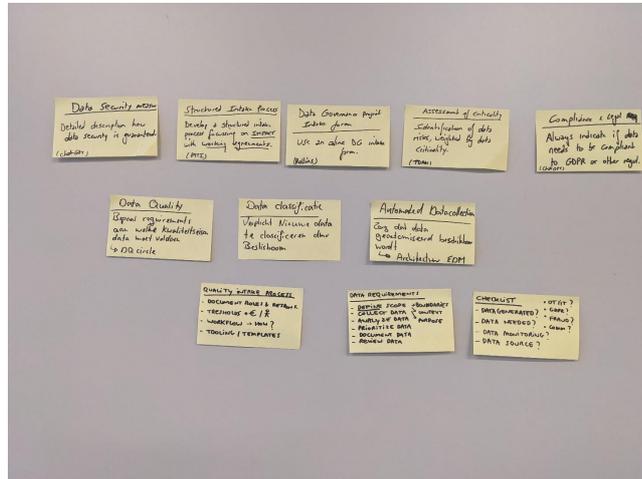
- **Timing:** 5 minutes per person
- Allow each participant to present their Lightning Demos. Emphasize that the focus should be on the **essential features** of the operating model and how it could potentially apply to our organization.
- Encourage participants to **take notes** on ideas they find particularly interesting or applicable.
- Once everyone has presented, stick the sticky notes on the wall so everyone has a view of what's been presented.



## WEEK 2 of 5

### Workshop 3 of 7 | Lightning Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 2 of 5

### The Data Players | Workshop 3 of 7

- Exercise 1. Responsibility Mapping
- Exercise 2. Lightning Demos
- Exercise 3. Concept Creation
- Exercise 4. Roles Roster

Next up, we'll take the insights gained from our Lightning Demos and the roles and responsibilities we've defined to design a set of **operating model concepts** tailored to our organization.

This is where creativity meets strategy—each participant will have the opportunity to envision how our data governance framework could be structured to optimize **communication flows, workflows, and organizational bodies**.

The goal is to create a robust, effective operating model that aligns with our data governance purpose and strategic goals. By the end of this exercise, we'll collaboratively refine these ideas into a **cohesive target operating model** that will guide our future efforts.

## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation

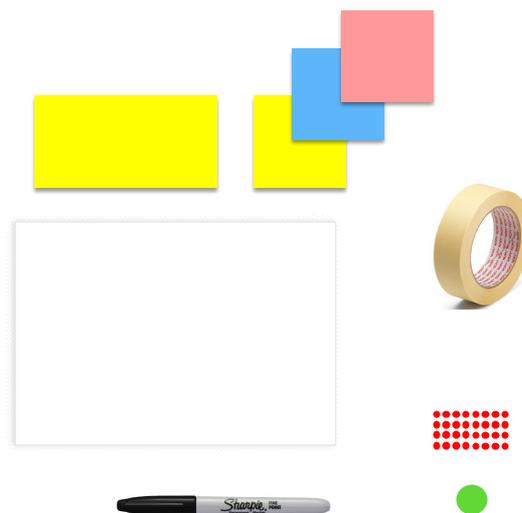
1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

Between 2 to 3 hours

## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective is to create a **self-explanatory concept** for an effective operating model that best supports our data governance framework, focusing on communication flows, workflows, and organizational structure.
  - Participants will create individual concepts, present them to the group, and then use a **structured voting process** to select and refine the best elements into a final target operating model.

## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation

#### Step 1: Concept Creation

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 20 - 30 minutes
  - Each participant is provided with a large A3-sized paper and a set of sticky notes (different sizes and colors).
  - Individually, participants will sketch out **their vision of the operating model**, placing the defined roles in appropriate locations, defining organizational bodies, and focusing on **communication flows** and **workflows**.
  - Encourage participants to be creative while ensuring their concepts are practical and aligned with the insights gained from the Lightning Demos.
  - Also ask participants to give their concept a name, this will come in handy later.

# WEEK 2 of 5

## Workshop 3 of 7 | Concept Creation

### Step 1: Concept Creation

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

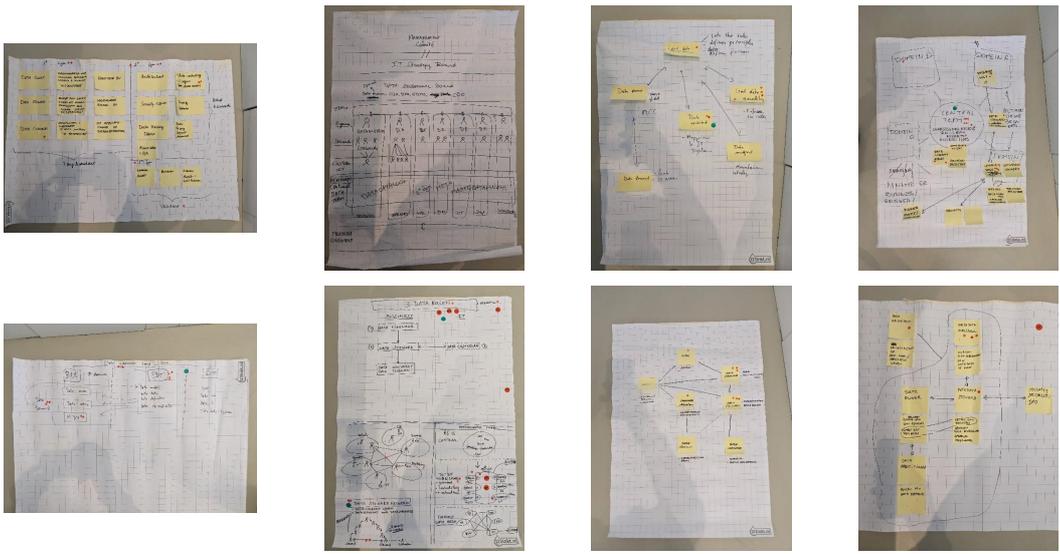


#### What are organizational bodies?

- Organizational bodies in data governance refer to **structured groups or committees** responsible for overseeing, guiding, and implementing data governance policies and practices within an organization.
- These bodies often include a Data Governance Council, Data Management Office, and specific working groups focused on data quality, security, or compliance.

# WEEK 2 of 5

## Workshop 3 of 7 | Concept Creation



## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation

#### Step 2: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 - 20 minutes
- After completing their sketches, each participant presents their operating model concept to the group.
- Presenters should explain the structure, the placement of roles, how communication flows are managed, and how workflows are integrated.
- Encourage the group to **take notes** on interesting ideas or elements they find particularly compelling. This will come in handy during the Strawpoll voting.
- After presenting, stick the concepts on the wall.

## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation

#### Step 3: Heatmap Voting



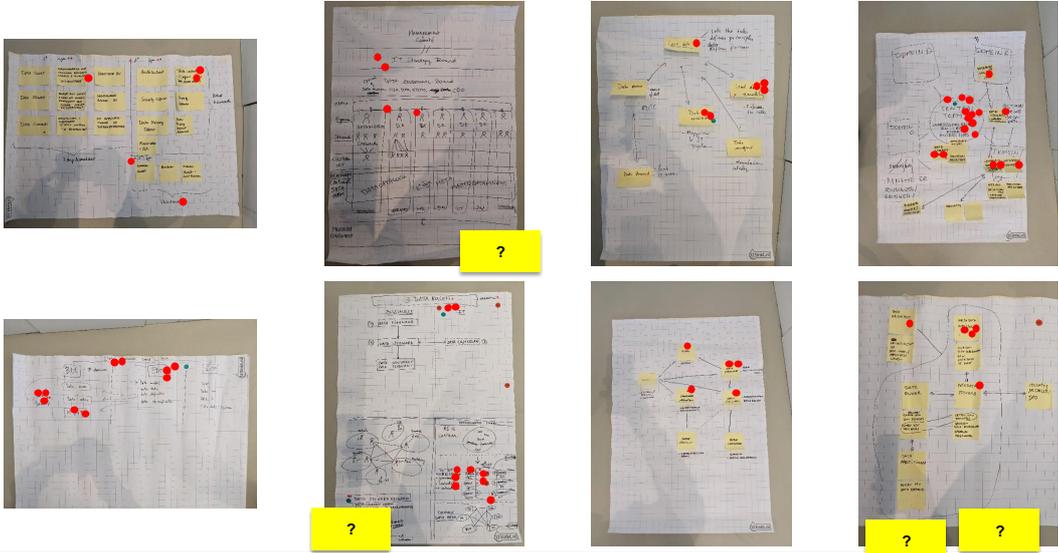
1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 minutes
- Participants are given **as many voting dots as possible** and asked to place them on the specific elements of the operating models they find critical or particularly effective. It's all about collecting a "heat map" of opinions.
- Focus on **voting for elements** that you believe are essential to the success of the operating model, considering alignment with the data governance purpose and goals.
- As they read along, they can jot down **any questions** that are simply for clarification on a separate sticky note. So, if there's something they're not quite grasping in a concept, they can write a question on a sticky note and pop it underneath.



# WEEK 2 of 5

## Workshop 3 of 7 | Concept Creation



# WEEK 2 of 5

## Workshop 3 of 7 | Concept Creation

### Step 3bis: Separate Facilitator Task

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- While the Heatmap Voting is happening, you as a Facilitator will be taking **quick notes** so that after this you can present to everyone the general idea with the concepts and the **essential elements** that have collected the most heat.
- So, have a notepad and take very quick notes on each concept.
  - ✓ Concept name (if it has a name)
  - ✓ The big idea
  - ✓ The essential elements with the most "heat"

### Step 4: Operating Models Presentation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- **Timing:** 2 minutes per concept
- Now it's time to bring everything together and make sure everyone on the team is on the same page. The goal is to align everyone's understanding and avoid any misinterpretations by having **the Facilitator cover all** the operating model concepts once more.
- In this step, you as the Facilitator, really just **calling out the main idea** of each concept and just the few elements that really got a lot of heat with the votes from the whole team.
- So, we're already starting to narrow down and help all of us, especially the Decider, to **start narrowing down** from a bunch of different ideas and pieces. This way, we can have a smaller set to choose from.

### Step 4: Operating Models Presentation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- Keep in mind that it's **NOT** about describing every single part of the concept. It's just about **calling out** those interesting ones that got all of those dots.
- The Facilitator uses the notes that they have taken during the Heatmap Voting exercise.
- Then quickly present each concept, aiming at 2 min per concept. So you'll be calling out:
  - ✓ Concept name (if it has a name)
  - ✓ The big idea
  - ✓ The essential elements with the most "heat"
  - ✓ Address the questions (if any)
- End with this sentence:
  - *"Did anyone vote on this for a **different reason** than what I explained?"*

### Step 5: Strawpoll Voting

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 minutes
- The Strawpoll vote is all about getting a sense of what everyone thinks about which operating model concepts we should go after.
- Set a timer for 5 minutes and have participants **silently decide** which concept they think is most appealing (without voting) and best serves our data governance purpose.
- Once they've decided which one they'll choose, they should write their **reasoning** on a sticky note. Make sure they also write the concept name on it.
- Once that's done, we do a **synchronized voting**. This way we make sure that everyone's made that decision without being influenced by anyone else.

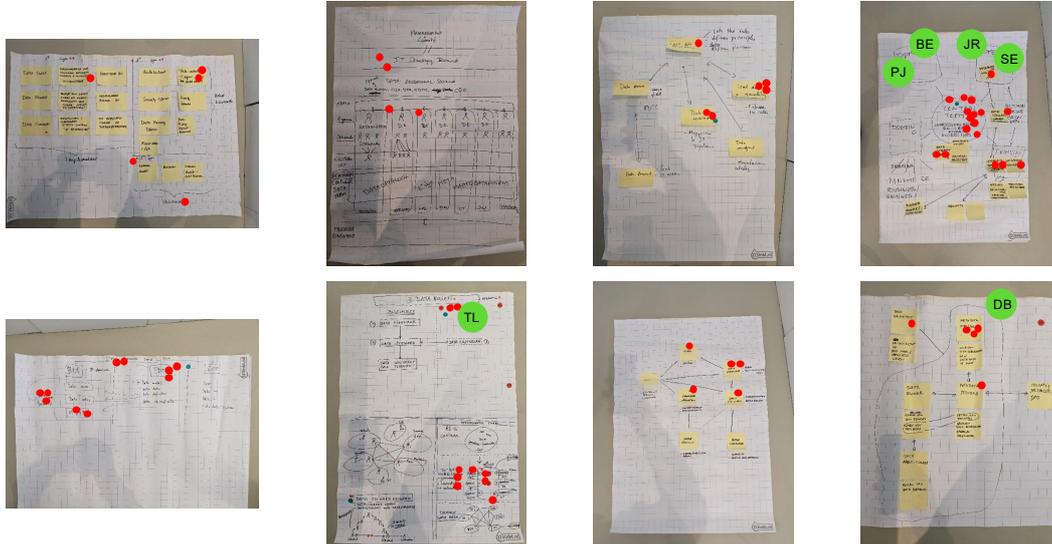
### Step 5: Strawpoll Voting

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 minutes
- Give each participant **one large voting dot** and have them write their **initials** on it.
- Set again a timer for 5 minutes, once the time is up, everyone should **vote at the same time** to avoid influencing each other's votes.
- Keep in mind that it's everyone's responsibility to inform the decider.

## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation



## WEEK 2 of 5

### Workshop 3 of 7 | Concept Creation

#### Step 6: Present

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 2 minutes per person
  - The Facilitator goes over the Strawpoll votes and calls each participant **one by one** to **explain** to the group :
    1. Which concept they've chosen
    2. Why did they choose it
  - The Facilitator needs to take care that the participants don't ramble and **don't take more than one minute** to explain their reasoning.

# WEEK 2 of 5

## Workshop 3 of 7 | Concept Creation

### Step 7: Decider Vote



- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 3 minutes
- The Decider reviews the results of the heatmap and strawpoll votes.
- The Decider casts the final vote, selecting the **primary operating model** and, if desired, **integrating top-voted elements** from other concepts. The Decider has the authority to switch up elements and finalize the structure.
- This step solidifies the key components of the final target operating model.

# WEEK 2 of 5

## Workshop 3 of 7 | Concept Creation



**WEEK 2 of 5**  
Workshop 3 of 7 | Concept Creation

**Step 8: Creating the Target Operating Model**

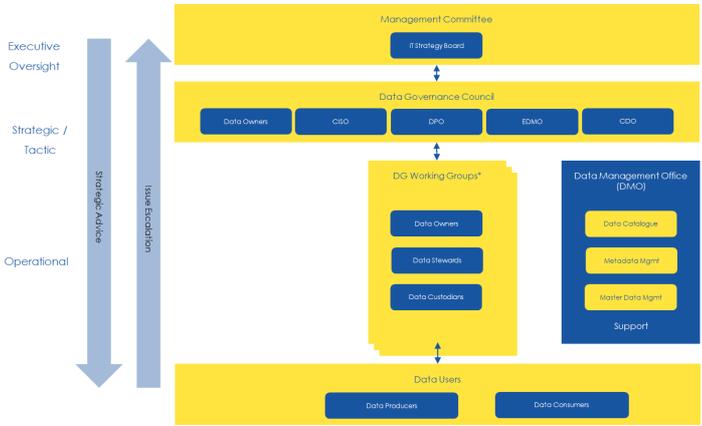
- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 10 minutes
- Summarize the top-voted elements from the previous voting sessions by **sketching out the target** operating model on a large sheet (or a whiteboard), incorporating all the top-voted elements and critical parts. Use the following approach:
  1. Place roles
  2. Define organizational bodies
  3. Illustrate communication flows
  4. Outline workflow
- As you sketch, invite participants to **provide input** and ensure that all critical elements are accurately represented. This collaborative approach helps ensure that everyone's insights are reflected in the final model.
- This final sketch will serve as the blueprint for your organization's data governance operating model moving forward.

**WEEK 2 of 5**  
Workshop 3 of 7 | Concept Creation

**Step 8: Creating the Target Operating Model**

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



## WEEK 2 of 5

### The Data Players | Workshop 3 of 7

**Exercise 1.** Responsibility Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

**Exercise 4.** Roles Roster

The goal of this final exercise – Roles Roster - is to identify the **bare minimum responsibilities** and roles necessary to effectively maintain data quality and document metadata for the selected CDEs.

By downsizing our target roles, responsibilities, and operating model, we will establish the most efficient and sustainable structure that can be **practically implemented** during our prototype and testing phase.

This simplified version will ensure that we are focusing our resources where they matter most, while still upholding the core principles of our data governance strategy.

## WEEK 2 of 5

### Workshop 3 of 7 | Roles Roster

**1.** Timing

Between 30 to 60 minutes

**2.** What you'll need

**3.** Introducing the exercise

**4.** Flow

## WEEK 2 of 5

### Workshop 3 of 7 | Roles Roster

Workshop 3  
Exercise 4

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 2 of 5

### Workshop 3 of 7 | Roles Roster

Workshop 3  
Exercise 4

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- The objective is to downsize and refine the list of roles, responsibilities, and the operating model to a **minimum sustainable version**, focusing specifically on the selected Critical Data Elements (CDEs) and their management.
- Participants will review the CDE shortlist, remove non-essential elements from the target roles and operating model, and use a **voting process** to finalize the streamlined version for the prototype and testing phase.

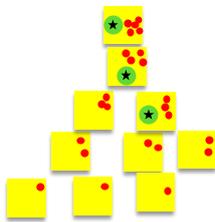
## WEEK 2 of 5

### Workshop 3 of 7 | Roles Roster

#### Step 1: Review the CDEs

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Start by revisiting the **CDE shortlist** that was created in the previous workshop.
- Ensure all participants are familiar with the selected CDEs and understand the importance of maintaining **data quality** and documenting **metadata** for these elements.



## WEEK 2 of 5

### Workshop 3 of 7 | Roles Roster

#### Step 2: Downsizing Roles and Responsibilities

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 – 15 minutes
- Begin by examining the current list of roles and responsibilities.
- Remove any roles or responsibilities that are **not critical or essential** to maintaining data quality and documenting metadata for the selected CDEs.
- Focus on **identifying the minimum set** of roles and responsibilities needed to ensure effective management.
- Encourage participants to **discuss and agree** on which elements are essential and which can be removed.



# WEEK 2 of 5

## Workshop 3 of 7 | Roles Roster

### Step 2: Downsizing Roles and Responsibilities

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 – 15 minutes
- As specific responsibilities are **adjusted or modified**, the facilitator notes these changes on sticky notes and adds them to the corresponding responsibility, ensuring all updates are clearly documented.



# WEEK 2 of 5

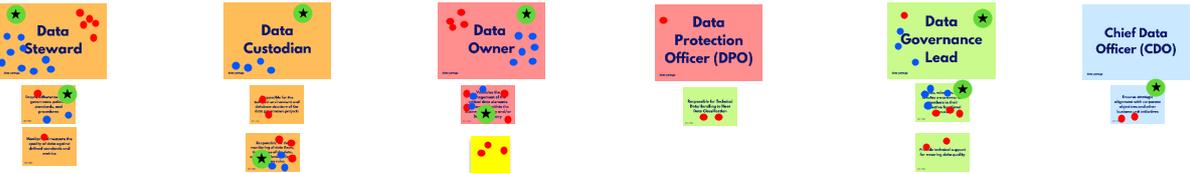
## Workshop 3 of 7 | Roles Roster

### Step 2: Downsizing Roles and Responsibilities

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

**i** **Facilitator Tip**

➤ If the participants are unable to reach a consensus on downsizing, distribute **voting dots** (using a different color from previous voting exercises) and conduct a **heatmap voting** session. Afterward, the Decider can make the final decision on the minimum set of roles and responsibilities needed to move forward.



## WEEK 2 of 5

### Workshop 3 of 7 | Roles Roster

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 3: Downsizing the Operating Model

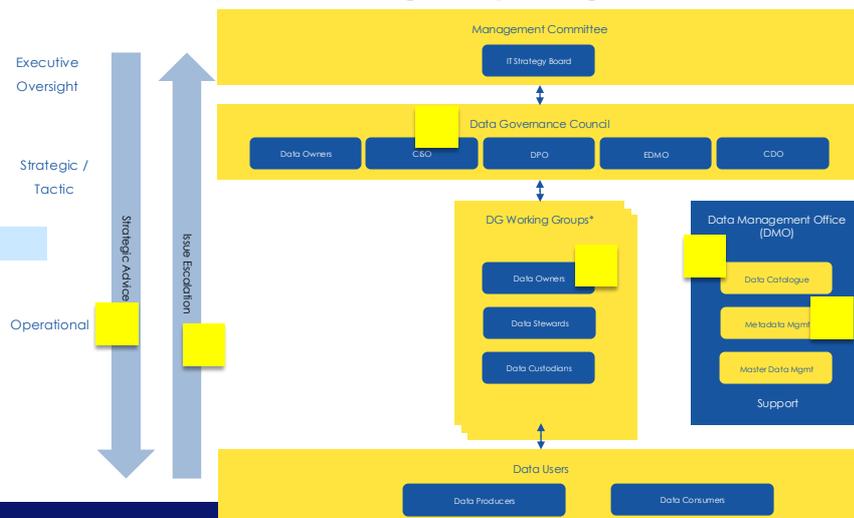
- **Timing:** 10 – 15 minutes
- Apply the same simplification process to the operating model, focusing only on the elements essential for managing the selected CDEs.
- **Remove any parts** of the operating model that do not directly contribute to CDE management, ensuring the structure remains lean and practical.
- The goal is to create a streamlined operating model that can be **easily implemented and sustained** during the prototype and testing phase.
- Facilitate this step as a **group discussion**. If consensus cannot be reached, conduct a heatmap voting session.
- As the facilitator, take notes of any **adjustments or modifications** on sticky notes and add them to the respective parts of the operating model.

## WEEK 2 of 5

### Workshop 3 of 7 | Roles Roster

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 3: Downsizing the Operating Model



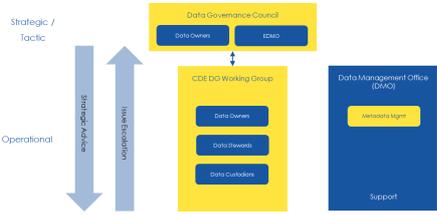
# WEEK 2 of 5

Workshop 3 of 7 | Roles Roster

## Step 4: Revisualize

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 10 minutes
- Summarize the final decisions by sketching out the new, streamlined **minimum sustainable version** of the roles, responsibilities, and operating model on whiteboard (or a large sheet).
- This finalized version will serve as the blueprint for the prototype and testing phase, focusing on the **practical management** of the selected CDEs.



# Week 2

1 Monday

2 Tuesday

3 Wednesday

4 Thursday

5 Friday

## WEEK 2 of 5

### The Data Players | Documentation

The Documentation phase on Wednesday is dedicated to refining and formalizing the **insights and outcomes** from The Data Players workshops conducted on Tuesday.

This phase is crucial for transforming the rough, collaborative work done in the workshop into **polished, actionable documents and artifacts** that will guide our data governance efforts moving forward.

Our goal is to take the raw outputs—such as the roles, responsibilities, the target operating model, and the minimum sustainable operating model—and turn them into clear, organized documentation that can be easily referenced and implemented.

#### Process and Refine Workshop Outcomes

- Clean up and organize the list of roles and responsibilities into a clear, concise document that reflects the decisions made during the workshop.
- Create a polished overview of the target operating model, ensuring that all elements are visually clear and well-defined.
- Develop a streamlined version of the operating model that includes the bare minimum roles and responsibilities necessary to effectively manage the selected CDEs.

#### Update the Data Governance Charter

- Begin integrating the documented roles, responsibilities, and operating models into the Data Governance Charter, ensuring that this foundational document reflects the latest decisions and strategies.

#### Create Visual and Functional Artifacts

- Design a visually appealing and easy-to-understand diagram or document that represents the finalized target operating model and the minimum sustainable operating model.

# Week 2

1  
Monday

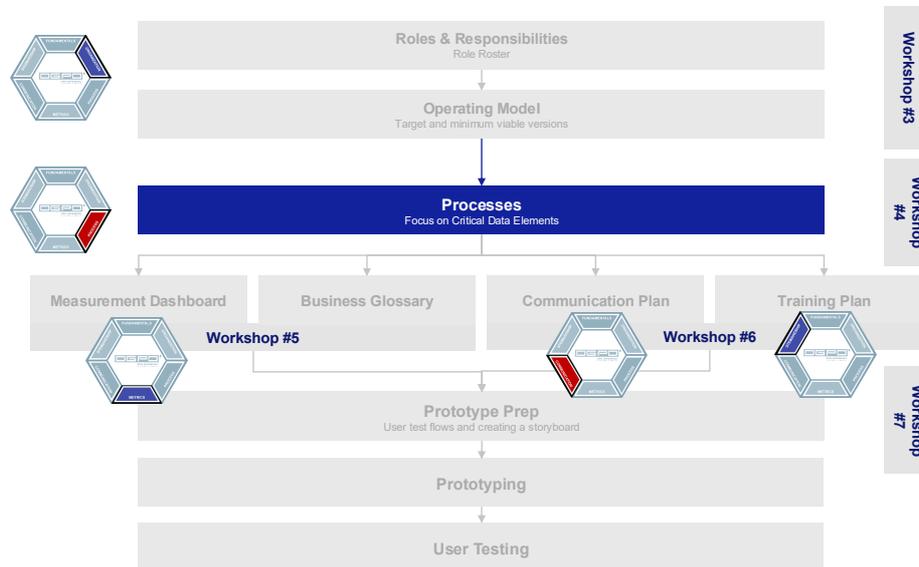
2  
Tuesday

3  
Wednesday

4  
Thursday

5  
Friday

# Data Governance SPRINT™



## WEEK 2 of 5

### The Rules of the Game | Workshop 4 of 7

#### The Rules of the Game Workshop: Defining Processes

Welcome to the fourth workshop of our Data Governance Sprint™—The Rules of the Game. In this critical session, we will establish the processes that will govern our data governance efforts, with a strong emphasis on the Critical Data Elements (CDEs) we've identified.

By **focusing on CDEs**, particularly their data quality and metadata documentation, we are zeroing in on the areas where we can deliver quick, tangible value. This approach not only showcases the effectiveness of data governance but also lays a solid foundation for scaling these practices across the organization.

During this workshop, we will delve deep into creating and refining the processes that will ensure consistent **data quality** and thorough **metadata documentation** for our selected CDEs. By the end of the day, we aim to have clear, actionable processes that can be immediately put to use during our prototype and testing phase. This is where we turn strategy into action, setting the rules that will guide our data governance initiatives to success.

##### Workshop 4: Thursday Full-Day

- Define and refine processes for managing CDEs, with a focus on data quality and metadata documentation.
- Achieve quick wins by honing in on CDEs, showcasing the tangible value of data governance.
- Include Applied Users Story Mapping, 3-layer Voting, and The Process Map to develop practical, aligned processes.
- Deliver a CDE Data Quality Process and a CDE Metadata Documentation Process for immediate implementation.

## WEEK 2 of 5

### The Rules of the Game | Workshop 4 of 7

#### Round 1: Data Quality Focus

**Exercise 1.** Applied Users Story Mapping

**Exercise 2.** The Process Map

**Exercise 3.** Applied Users Story Mapping

**Exercise 4.** The Process Map

In this exercise, we will dive into the practical aspects of **maintaining and improving the quality** of our Critical Data Elements (CDEs).

By mapping out the story of how data quality is managed within our organization, we'll create a clear, **step-by-step process** that ensures our data remains accurate, reliable, and valuable.

This is where strategy meets action—each of you will bring your insights to the table, mapping out how data quality issues are identified, addressed, and resolved.

By the end of this exercise, we'll have a well-defined process that can be implemented to safeguard the integrity of our most critical data.

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

**1. Timing**

Between 1 to 2 hours

**2. What you'll need**

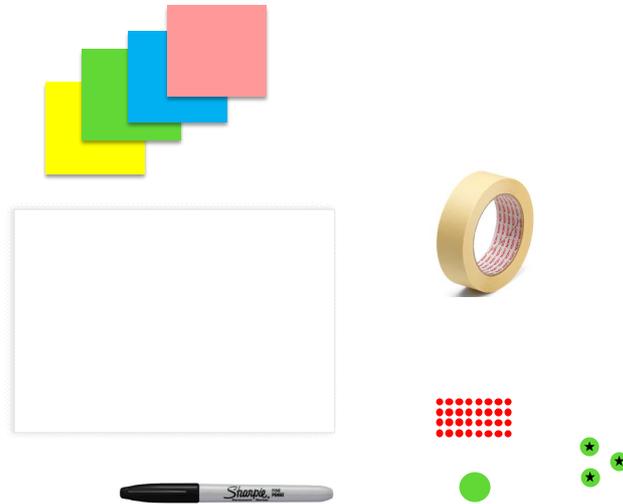
**3. Introducing the exercise**

**4. Flow**

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- The objective of this in-depth brainstorming exercise is to create a **detailed and actionable process flow** for maintaining and improving the data quality of Critical Data Elements (CDEs).
- Think of it as a **timeline of data activities** for specific users, aiming for the **target version**.
- Participants will individually map out the business process flow, identifying roles, responsibilities, activities, and decision points involved in managing data quality. The exercise will culminate in group presentations, voting, and the selection of a final process to be implemented.

# WEEK 2 of 5

## Workshop 4 of 7 | Applied Users Story Mapping

### Step 1: Set-up and Explanation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Provide each participant with a large sheet of paper (e.g., A3 or flipchart size) and **four colors** of sticky notes:

- 
➤ **Yellow:** Activities involved in the data quality process.
- 
➤ **Blue:** Data roles responsible for each activity.
- 
➤ **Pink:** Data governance bodies involved in the process.
- 
➤ **Green:** Gateways or decision points that influence the process flow.

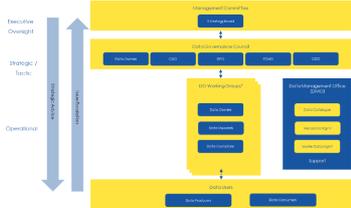
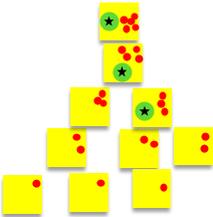
# WEEK 2 of 5

## Workshop 4 of 7 | Applied Users Story Mapping

### Step 1: Set-up and Explanation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- Begin by giving a brief explanation of the exercise, emphasizing that participants should focus specifically on the processes related to the **Critical Data Elements** (CDEs).
- Highlight that the goal is to map out the **data quality process**, and they should consider the previously created target roles, responsibilities, and operating model when designing their process.



## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

#### Step 2: Create the Story

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 20 minutes
- Ask every participant to write the **individual steps or activities** of the process for maintaining and improving the data quality of a CDE.
- Each step or activity should be on a single **yellow sticky note** and be easy to read.
- Each participant should aim to create **15-25 steps**.
- Encourage participants to **use swimlanes** to separate activities by role, making it clear who is responsible for what.
- Tell participants to **draw arrows** to indicate the sequence of activities, workflows, and communication flows between roles and bodies.

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

#### Step 2: Create the Story

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

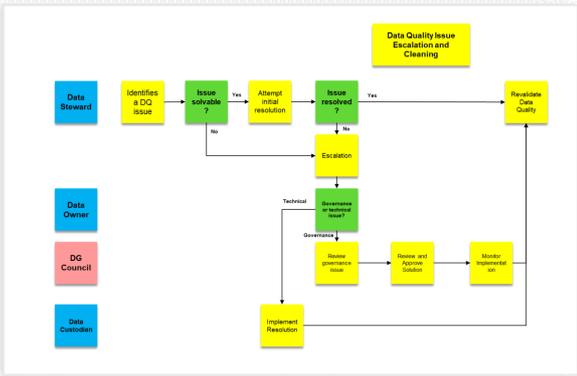
- Remind the participants to:
  - **Identify Activities:** Use yellow sticky notes to outline key activities such as data validation, issue reporting, and data cleansing.
  - **Assign Roles:** Use blue sticky notes to designate which roles are responsible for each activity.
  - **Involve Governance Bodies:** Use pink sticky notes to indicate the involvement of governance bodies in overseeing or supporting these activities.
  - **Decision Points:** Use green sticky notes for gateways or decision points where critical choices are made (e.g., when to escalate an issue).

# WEEK 2 of 5

## Workshop 4 of 7 | Applied Users Story Mapping

### Step 2: Create the Story

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

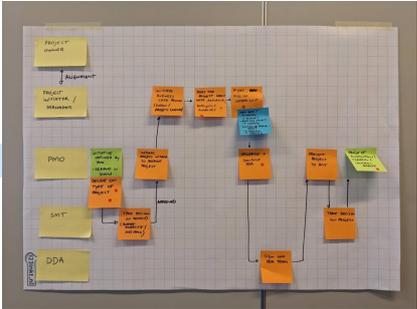


# WEEK 2 of 5

## Workshop 4 of 7 | Applied Users Story Mapping

### Step 2: Create the Story

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

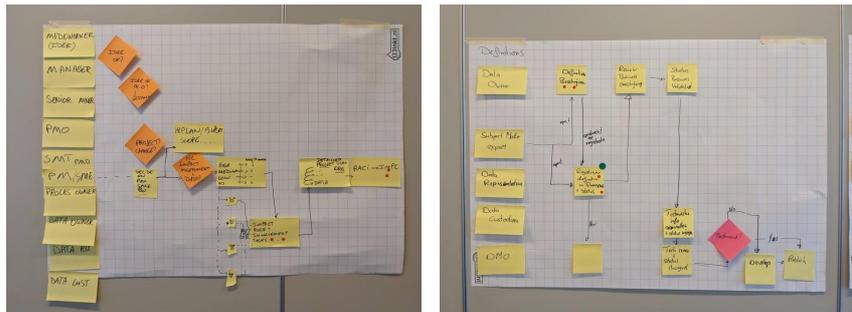


## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

#### Step 2: Create the Story

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

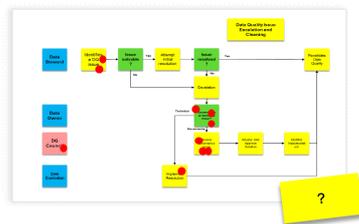
#### Step 3: Present

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 3 minutes per person
  - Once the process maps are complete, participants stick their concepts on the wall.
  - Each participant presents their process flow to the group, explaining the roles, activities, and decision points they've identified.

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



### Step 4: Heatmap Voting



- **Timing:** 15 minutes
- Participants are given **as many voting dots as possible** and asked to place them on the specific elements of the concepts they find critical or particularly effective. It's all about collecting a "heat map" of opinions.
- Focus on **voting for elements** that you believe are essential to the success of the CDE data quality process, considering alignment with the data governance purpose and goals.
- As they read along, they can jot down **any questions** that are simply for clarification on a separate sticky note. So, if there's something they're not quite grasping in a concept, they can write a question on a sticky note and pop it underneath.



## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



### Step 4bis: Separate Facilitator Task

- While the Heatmap Voting is happening, you as a Facilitator will be taking **quick notes** so that after this you can present to everyone the general idea with the concepts and the **essential elements** that have collected the most heat.
- So, have a notepad and take very quick notes on each concept.
  - ✓ Concept name (if it has a name)
  - ✓ The big idea
  - ✓ The essential elements with the most "heat"

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

#### Step 5: Users Stories Presentation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- **Timing:** 2 minutes per concept
- Now it's time to bring everything together and make sure everyone on the team is on the same page. The goal is to align everyone's understanding and avoid any misinterpretations by having **the Facilitator cover all** the process flow concepts once more.
- In this step, you as the Facilitator, really just **calling out the main idea** of each concept and just the few elements that really got a lot of heat with the votes from the whole team.
- So, we're already starting to narrow down and help all of us, especially the Decider, to **start narrowing down** from a bunch of different ideas and pieces. This way, we can have a smaller set to choose from.

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

#### Step 5: Users Stories Presentation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- Keep in mind that it's **NOT** about describing every single part of the concept. It's just about calling out those interesting ones that got all of those dots.
- The Facilitator uses the notes that they have taken during the Heatmap Voting exercise.
- Then quickly present each concept, aiming at 2 min per concept. So you'll be calling out:
  - ✓ Concept name (if it has a name)
  - ✓ The big idea
  - ✓ The essential elements with the most "heat"
  - ✓ Address the questions (if any)
- End with this sentence:
  - *"Did anyone vote on this for a **different reason** than what I explained?"*

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

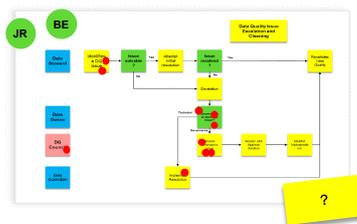
#### Step 6: Strawpoll Voting

- **Timing:** 10 minutes
- The Strawpoll vote is all about getting a sense of what everyone thinks about which users story or process flow concepts we should go after.
- Set a timer for 5 minutes and have participants **silently decide** which concept they think is most appealing (without voting) and best serves our purpose of maintaining data quality.
- Once they've decided which one they'll choose, they should write their **reasoning** on a sticky note. Make sure they also write the concept name on it.
- Once that's done, we do a **synchronized voting**. This way we make sure that everyone's made that decision without being influenced by anyone else.

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



#### Step 6: Strawpoll Voting

- **Timing:** 10 minutes
- Give each participant **one large voting dot** and have them write their **initials** on it.
- Set again a timer for 5 minutes, once the time is up, everyone should **vote at the same time** to avoid influencing each other's votes.
- Keep in mind that it's everyone's responsibility to inform the decider.

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

#### Step 7: Present

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 2 minutes per person
  - The Facilitator goes over the Strawpoll votes and calls each participant **one by one** to **explain** to the group :
    1. Which concept they've chosen
    2. Why did they choose it
  - The Facilitator needs to take care that the participants don't ramble and **don't take more than one minute** to explain their reasoning.

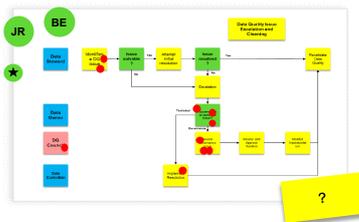
## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

#### Step 8: Decider Vote



1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 3 minutes
  - The Decider reviews the results of the heatmap and strawpoll votes.
  - The Decider casts the final vote, selecting the **primary process flow** and, if desired, **integrating top-voted elements** from other concepts. The Decider has the authority to switch up elements and finalize the structure.
  - This step solidifies the key components of the final target data quality process flow for CDEs.



## WEEK 2 of 5

### The Rules of the Game | Workshop 4 of 7

#### Round 1: Data Quality Focus

**Exercise 1.** Applied Users Story Mapping

**Exercise 2.** The Process Map

**Exercise 3.** Applied Users Story Mapping

**Exercise 4.** The Process Map

After exploring individual concepts in the previous exercise, it's time to bring our ideas together and collaboratively create a **unified process map** for maintaining and improving the data quality of our Critical Data Elements (CDEs).

This exercise will **synthesize the best elements** from our individual efforts into a clear, practical process that can be implemented across the organization.

By working together, we'll ensure that the final process map is comprehensive, effective, and aligned with our data governance objectives.

## WEEK 2 of 5

### Workshop 4 of 7 | The Process Map

**1.** Timing

Between 30 to 60 minutes

**2.** What you'll need

**3.** Introducing the exercise

**4.** Flow

## WEEK 2 of 5

### Workshop 4 of 7 | The Process Map

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 2 of 5

### Workshop 4 of 7 | The Process Map

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of this exercise is to collaboratively develop a **finalized process map** for maintaining and improving the data quality of CDEs, integrating the most effective elements from the individual concepts.
  - Participants will engage in a **facilitated group discussion** to refine and consolidate the data quality process, ensuring it is practical, comprehensive, and ready for implementation.

## WEEK 2 of 5

### Workshop 4 of 7 | The Process Map

#### Step 1: Set Up the Data Players

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 2 minutes
- Begin by adding the **selected data roles** from Exercise 1 to the left side of the whiteboard, creating swimlanes for each role.
- These **swimlanes** will help organize the activities and responsibilities of each data player in the process.
- The facilitator guides the group in identifying and placing the top-voted and Decider-selected data roles, ensuring that all key players are represented in the swimlanes.

## WEEK 2 of 5

### Workshop 4 of 7 | The Process Map

#### Step 2: Define the Goal

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 2 minutes
- Clearly define the **goal of the process**, which could be for example the monitored data quality of a CDE. Write the goal on the right side of the whiteboard.
- If there is no clear consensus among participants, use a note and vote method to decide on the goal.
- The facilitator ensures that the goal is well-understood and agreed upon by all participants, as this will guide the rest of the process mapping.

### Step 3: Collaborative Process Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 minutes
- With the swimlanes and goal in place, the facilitator leads the group in adding activities, decision points, and communication flows to the process map.
- Begin by **summarizing the top-voted elements** from the previous exercise, where participants identified the critical activities, roles, and concepts they found essential.
- Start by **outlining the sequence of activities** that constitute the data quality process. Ensure that each step is logically ordered and flows smoothly from one to the next.
- As you sketch, invite participants to **provide input** and make sure that all critical elements are accurately represented. This collaborative approach ensures that everyone's insights are reflected in the final model.

### Step 3: Collaborative Process Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 minutes
- Clearly define the **data governance bodies** involved in the process, placing them appropriately in the flow where their roles are most relevant.
- Draw **arrows or lines** to represent the communication flows between roles and bodies, ensuring that the exchange of information is clear and effective throughout the process.
- The final sketch will serve as the blueprint for your organization's data quality process within the data governance framework, ready for implementation and further refinement during the prototype and testing phases.

**Step 4: Refinement**

- 1. Timing
  - 2. What you'll need
  - 3. Introducing the exercise
  - 4. Flow
- **Timing:** 10 minutes
  - Review the completed process map as a group. Identify any **gaps** or areas that need further **refinement**.
  - The facilitator guides the group through any final adjustments, ensuring the process map is comprehensive and ready for implementation.

**Exercise 1.** Applied Users Story Mapping

**Exercise 2.** The Process Map

**Round 2: Metadata Documentation Focus**

**Exercise 3.** Applied Users Story Mapping

**Exercise 4.** The Process Map

In this second round of exercises, we shift our focus from maintaining and improving data quality to the crucial task of **documenting the metadata** for our Critical Data Elements (CDEs).

Effective metadata documentation is essential for ensuring that data definitions, business rules, and other key aspects of our CDEs are well-understood and consistently applied across the organization.

In this round we'll work on creating a **structured process** for documenting metadata. For this second round of exercises, we will follow a **similar approach** as we did in the first round, but with a focus on metadata documentation.

## WEEK 2 of 5

### Workshop 4 of 7 | Applied Users Story Mapping

**Exercise 1.** Applied Users Story Mapping

**Exercise 2.** The Process Map

**Round 2: Metadata Documentation Focus**

**Exercise 3.** Applied Users Story Mapping

**Exercise 4.** The Process Map

Just as we did with the data quality process, you'll be **mapping out the process flow** and the individual activities, but this time, we'll concentrate on how to effectively document metadata for CDEs.

**Follow the same steps outlined in Exercise 1**, but apply them to the metadata documentation process. Remember to consider the roles, responsibilities, and operating model we previously established.

## WEEK 2 of 5

### Workshop 4 of 7 | The Process Map

**Exercise 1.** Applied Users Story Mapping

**Exercise 2.** The Process Map

**Round 2: Metadata Documentation Focus**

**Exercise 3.** Applied Users Story Mapping

**Exercise 4.** The Process Map

In this exercise, we'll once again bring together the best ideas from the previous exercise to create a **unified process map**. Our goal is to develop a clear, actionable process for documenting metadata that can be implemented across the organization.

**Use the same approach as described in Exercise 2**, but this time focus on creating a process map for metadata documentation. Ensure that all critical elements identified in the previous exercise are incorporated into the final process flow.

# Week 2

1

Monday

2

Tuesday

3

Wednesday

4

Thursday

5

Friday

## WEEK 2 of 5

### The Rules of the Game | Documentation

On Friday, we focus exclusively on **documenting the insights and results** from the Thursday workshops, "The Rules of the Game."

The primary goal of this phase is to refine and formalize the outcomes of our work, ensuring that we have clear, well-structured documents and artifacts that can guide the next steps in our data governance journey.

#### Process and Refine Workshop Outcomes

- Clean up and refine the rough process flows developed during the workshops, ensuring they are clear, actionable, and visually appealing.
- Create polished versions of the CDE Data Quality Process and the CDE Metadata Documentation Process that can be easily shared and referenced within the organization.
- Develop detailed process flow diagrams for both the CDE Data Quality Process and the CDE Metadata Documentation Process.

#### Drafting a small policy (optional)

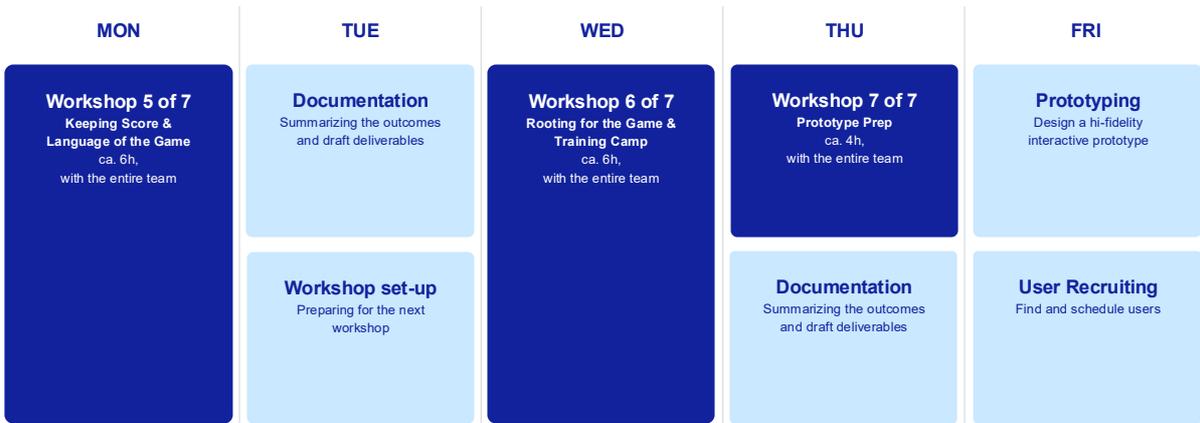
- Start drafting a concise policy that incorporates the process flows.
- Break down the activities outlined in the process flow, and clearly identify the roles and responsibilities involved in each step.
- Ensure that the policy is straightforward and practical, ready for immediate implementation.

# Week 3



## WEEK 3 of 5

Designing Governance Essentials | [Define & Decide](#)



## WEEK 3 of 5

Designing Governance Essentials | Define & Decide

### Welcome to Week 3: Designing Governance Essentials

This week marks a critical phase in our Data Governance Sprint™ as we shift our focus to creating and building the **tangible, essential elements** of our data governance program. Our goal is to develop practical tools that are ready for immediate use, starting with a simple yet effective **measurement dashboard** and a **business glossary** template. These tools will provide the foundation for consistent communication and tracking of our data governance efforts.

Recognizing that change management and communication are pivotal to the success of any data governance program, we'll also identify and plan the **communication and training activities** that will ensure all stakeholders are informed, engaged, and prepared to execute their roles.

As we progress, we'll prepare for the **prototyping phase**, where we'll bring together everything we've built and create a **minimum sustainable version** of our data governance program. This version will be put into practice and tested next week. To support this, we will also begin **recruiting our test audience**. The entire week is centered around defining the practical aspects of our program and making crucial decisions that will guide our next steps.

## Week 3

1

Monday

2

Tuesday

3

Wednesday

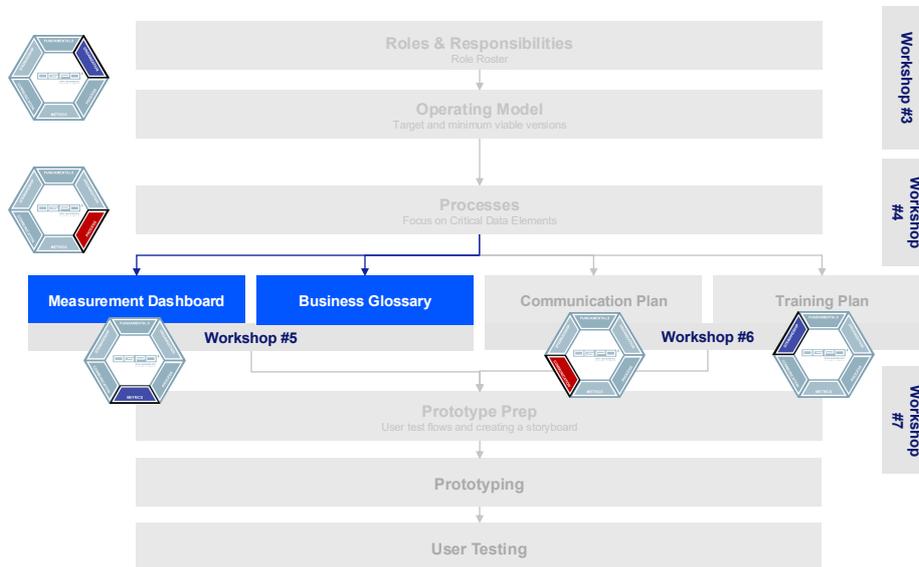
4

Thursday

5

Friday

## Data Governance SPRINT™



## WEEK 3 of 5

### Designing Governance Essentials | Workshop 5 of 7

#### Keeping Score Workshop: Creating a Measurement Dashboard

The first part of Monday's workshop focuses on creating a Measurement Dashboard that will serve as the backbone of our data governance **performance tracking**. We'll work together to identify the most **meaningful metrics** that align with our business goals and governance objectives.

By the end of this session, we'll have a clear, actionable dashboard template that includes both quantitative and qualitative metrics.

#### The Language of the Game Workshop: Setting up the Business Glossary

In the second part of the day, we shift our focus to establishing a Business Glossary. This glossary will be the cornerstone of **consistent and effective communication** across all data governance efforts.

The template we will design will help define critical terms and concepts, ensuring that everyone in the organization is on the same page.

## WEEK 3 of 5

### Designing Governance Essentials | Workshop 5 of 7

#### Workshop 5: Monday Full-Day

- Identify and prioritize key data quality metrics and governance KPIs.
- Design a dashboard layout that is intuitive and provides actionable insights.
- Determine and prioritize key elements for a business glossary and data dictionary.
- Develop a practical, easily implementable glossary template that can be regularly updated and expanded over time.

## WEEK 3 of 5

### Keeping Score | Workshop 5 of 7

#### Round 1: Measurement Focus

**Exercise 1.** Metrics Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

**Exercise 4.** Lightning Demos

**Exercise 5.** 10 for 10 Brainstorm

**Exercise 6.** Concept Creation

In this first exercise, we will identify and map out the **key data quality metrics and governance KPIs** that will form the foundation of our data governance dashboard.

These metrics will allow us to measure not only the health and integrity of our Critical Data Elements (CDEs) but also the efficiency and effectiveness of our overall data governance program.

By selecting the right metrics, we ensure that our data governance initiatives are driven by meaningful, measurable goals. Through collaboration, we will narrow down the most important metrics, enabling us to track progress and drive impactful decision-making

# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

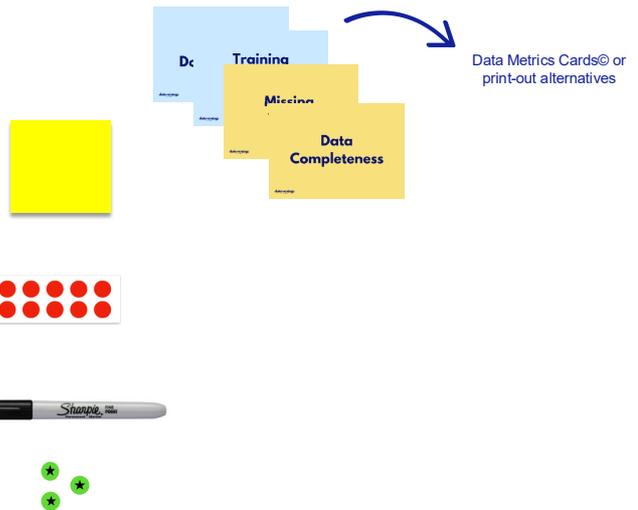
- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

Between 1 to 2 hours

# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



## WEEK 3 of 5

### Workshop 5 of 7 | Metrics Mapping

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of this exercise is to identify and prioritize essential **data quality metrics** (e.g., completeness, accuracy) and **governance KPIs** (e.g., policy compliance, data stewards onboarded) that will be used to measure the success of the data governance program.
  - Participants will use **Data Metrics Cards**® to individually map key metrics, then collaborate to categorize and vote on the most critical metrics to include in the final dashboard.

## WEEK 3 of 5

### Workshop 5 of 7 | Metrics Mapping

#### Step 1: Metrics Mapping

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 15 minutes
  - Distribute a set of **Data Metrics Cards**® to each participant (or a subset if sharing a single deck).
  - If the deck isn't available, you can print out the necessary templates—see the [resources section](#) for details.
  - Each participant will individually select the **data quality metrics and data governance KPIs** they believe are essential for achieving the data governance goals.
  - Encourage participants to concentrate on CDE metrics and governance KPIs that track both efficiency and effectiveness, aiming to limit their selection to a **maximum of 20 cards**.
  - Prompt participants to prioritizing those most relevant to your organization's goals.

# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 1: Metrics Mapping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

For each participant, this could look like this for example:

Missing Values	Outdated Records	Error Rate	Data Stewards Onboarded
Data Completeness	Data Consistency	Training Sessions Delivered	Data Validity
DG Audits Completed	CDEs Documented	Resolved Data Issues	Stakeholder Engagement

# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 2: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- Timing: 2 minutes per person
- Each participant **presents the metrics** they selected, briefly explaining their choices, and places their Data Metrics Cards® in the center of the table for review.
- Avoid discussion** at this stage—simply share the selected metrics and reasons behind them.
- The facilitator will stack or remove any duplicate metrics to maintain clarity.



# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 3: Domain Grouping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



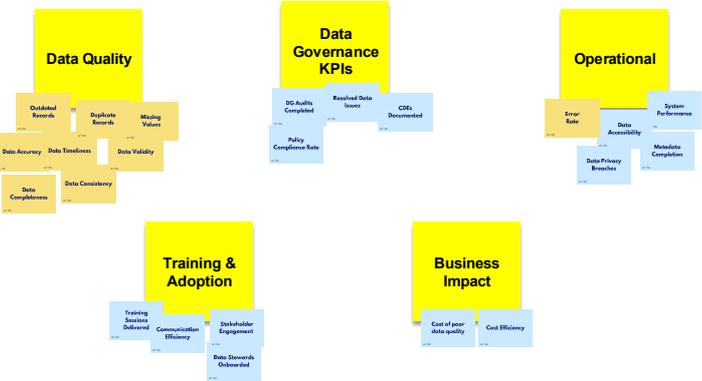
- **Timing:** 10 minutes
- The facilitator leads a **time-boxed discussion** to group the metrics into broader domains, such as Data Quality, Business Impact, Governance KPIs or Training.
- Participants collaborate to categorize the metrics, placing them into **logical groups**.
- **Label each group** with a sticky note indicating the respective domain, placing it above the corresponding stack of cards.
- Keep the discussion streamlined and efficient, ensuring that the metrics and KPIs are logically grouped without delving into excessive detail

# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 3: Domain Grouping

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



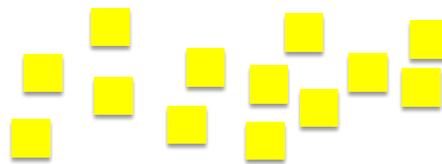
# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 4: Metrics Brainstorm

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Each participant should write down some **additional metrics or KPIs** — one per sticky note— that may have been missed within the identified domains, or in domains not yet identified.
- Focus on generating a wide variety of metrics and KPIs. Keep them brief and to the point.



# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 5: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minutes
- Ask participants to add their additional metrics and KPIs to the respective group of data management domains.
- Quickly remove any obvious duplicates, but avoid discussion or debate at this point.



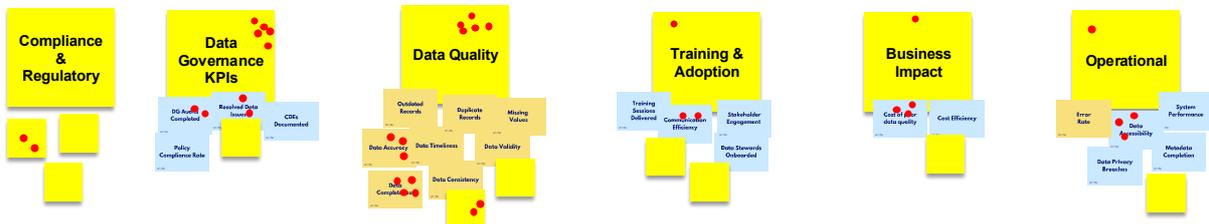
# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 6: Heatmap Voting

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Give every participant **10 voting dots**.
- Let them **silently vote** on the metrics and KPIs they believe are essential for achieving the data governance purpose and target state– avoid discussions.
- Tell them that there are **no voting rules**.



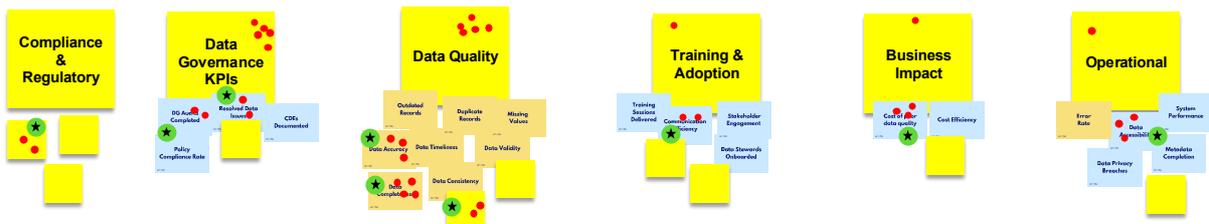
# WEEK 3 of 5

## Workshop 5 of 7 | Metrics Mapping

### Step 7: Decider Vote

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Give the decider **10 special voting dots**.
- The decider will place special voting **dots on the metrics** and KPIs that they determine are most crucial to prioritize.



# WEEK 3 of 5

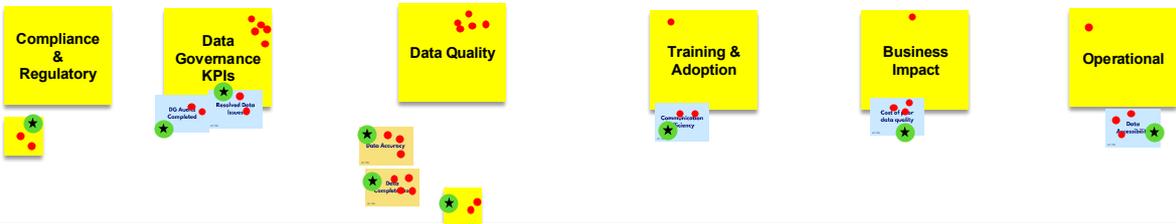
## Workshop 5 of 7 | Metrics Mapping

### Step 8: Revisualize

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise

- **Timing:** 1 minute
- Separate the top-voted metrics from the rest of the stack.
- This will give us a **clear, high-level view** of the key metrics and KPIs.

#### 4. Flow



# WEEK 3 of 5

## Keeping Score | Workshop 5 of 7

### Round 1: Measurement Focus

- Exercise 1. Metrics Mapping
- Exercise 2. Lightning Demos
- Exercise 3. Concept Creation

In this exercise, we'll take a moment to step outside our own organization and **gather inspiration** from the world around us.

By looking at how other companies and industries visualize their data quality metrics and governance KPIs, we can uncover fresh ideas and discover innovative ways to design our own dashboard.

These "Lightning Demos" will help spark creativity, ensuring that we **create a dashboard** that is not only functional but also intuitive and engaging for stakeholders. Think of it as a quick dive into the best practices and visualizations that can elevate our data governance efforts.

- Exercise 4. Lightning Demos
- Exercise 5. 10 for 10 Brainstorm
- Exercise 6. Concept Creation

## WEEK 3 of 5

Workshop 5 of 7 | Lightning Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

Between 30 to 45 minutes

## WEEK 3 of 5

Workshop 5 of 7 | Lightning Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow





## WEEK 3 of 5

### Workshop 5 of 7 | Lightning Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

#### Step 1: Search for Demos

- **Timing:** 15 - 30 minutes
- Each participant will **search the web for examples** of data metrics dashboards from other companies or industries.
- Encourage them to find examples that go beyond your specific industry—creativity can come from anywhere.
- Examples can focus on different types of metrics, visualization techniques, or overall dashboard layouts that are functional and engaging.
- By the end of this exercise, each participant should have **2-3 examples** ready to present, along with an explanation of what makes each one inspiring.
- For each Lightning Demo, ask participants to summarize the key concept on a rectangular sticky note, giving it a catchy title as well.

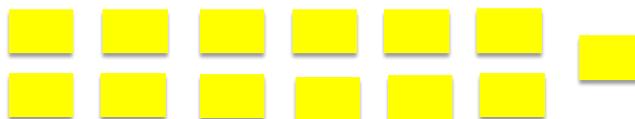
## WEEK 3 of 5

### Workshop 5 of 7 | Lightning Demos

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

#### Step 2: Present

- **Timing:** 5 minutes per person
- Participants present their selected dashboards, showcasing what they find inspiring and explaining how the concepts could be applied to your organization's data governance metrics.
- Focus on **key elements** like layout, data visualization techniques, and usability features that stand out.
- Stick the demo's summary sticky note on the wall for others to see and refer to.



## WEEK 3 of 5

Keeping Score | Workshop 5 of 7

### Round 1: Measurement Focus

**Exercise 1.** Metrics Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

**Exercise 4.** Lightning Demos

**Exercise 5.** 10 for 10 Brainstorm

**Exercise 6.** Concept Creation

Now that we've drawn inspiration from a range of dashboards through our Lightning Demos, it's time to shift gears and start **creating our own**.

In this Concept Creation exercise, we'll design the foundation of our data metrics dashboard, turning ideas into a tangible, workable structure. This is where creativity meets practicality.

Each participant will **map out their vision** for a dashboard that effectively displays the key metrics we've prioritized. The goal is to create something simple, intuitive, and impactful—something that will help drive data governance forward by keeping the most essential metrics front and center.

## WEEK 3 of 5

Workshop 5 of 7 | Concept Creation

**1.** Timing

Between 1 to 2 hours

**2.** What you'll need

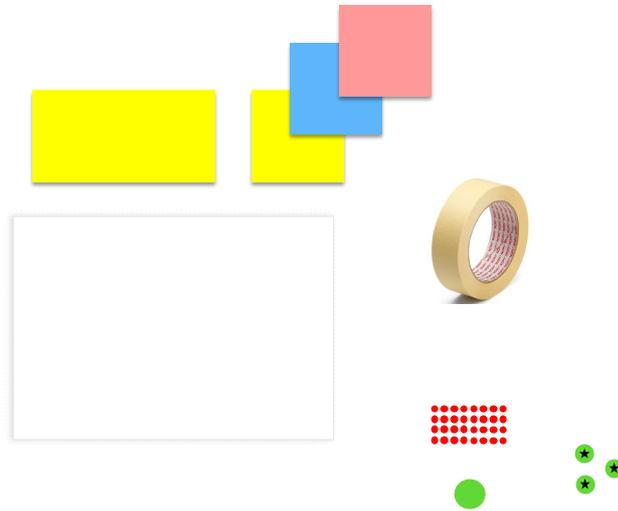
**3.** Introducing the exercise

**4.** Flow

## WEEK 3 of 5

Workshop 5 of 7 | Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 3 of 5

Workshop 5 of 7 | Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- The objective is to design the **basic layout of a data metrics dashboard** by placing the prioritized metrics into a simple and effective dashboard structure.
- Participants will **individually sketch** their concepts for a data metrics dashboard, incorporating both data quality metrics and governance KPIs, and then share their designs for group feedback and voting.

## WEEK 3 of 5

### Workshop 5 of 7 | Concept Creation

#### Step 1: Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

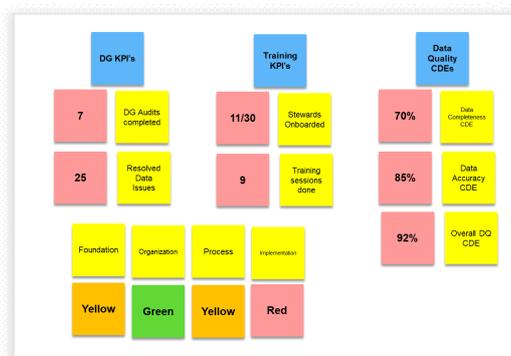
- **Timing:** 20 - 30 minutes
- Each participant is provided with a large A3-sized paper and a set of sticky notes (different sizes and colors).
- They will then create a **draft dashboard** that organizes and visualizes the top-voted metrics from Exercise 1.
- Focus on laying out the dashboard in a way that makes the metrics easily **understandable and actionable**.
- Consider both the data quality metrics (e.g., completeness, accuracy) and governance KPIs (e.g., policy compliance rate, data stewards onboarded). Think about clarity, simplicity, and how to make the dashboard accessible for all stakeholders.
- Also ask participants to give their concept a name, this will come in handy later.

## WEEK 3 of 5

### Workshop 5 of 7 | Concept Creation

#### Step 1: Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



# WEEK 3 of 5

## Workshop 5 of 7 | Concept Creation

### Step 2: Present

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 15 - 20 minutes
  - Each participant **presents their dashboard** concept to the group, explaining how the layout works, why they chose certain visual elements, and how the dashboard helps to meet the organization's data governance goals.
  - Focus on how the metrics are arranged and how the dashboard will be used by different roles within the organization.
  - Encourage the group to **take notes** on interesting ideas or elements they find particularly compelling. This will come in handy during the Strawpoll voting.
  - After presenting, stick the concepts on the wall.

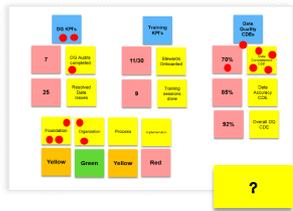
# WEEK 3 of 5

## Workshop 5 of 7 | Concept Creation

### Step 3: Heatmap Voting



1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 15 minutes
  - Participants are given **as many voting dots as possible** and asked to place them on the specific elements they believe are most effective from each concept. It's all about collecting a "heat map" of opinions.
  - Focus on **voting for elements** that you believe are critical to include in the final dashboard.
  - As they read along, they can jot down **any questions** that are simply for clarification on a separate sticky note. So, if there's something they're not quite grasping in a concept, they can write a question on a sticky note and pop it underneath.



### Step 3bis: Separate Facilitator Task

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- While the Heatmap Voting is happening, you as a Facilitator will be taking **quick notes** so that after this you can present to everyone the general idea with the concepts and the **essential elements** that have collected the most heat.
- So, have a notepad and take very quick notes on each concept.
  - ✓ Concept name (if it has a name)
  - ✓ The big idea
  - ✓ The essential elements with the most "heat"

### Step 4: Concept Presentation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



- **Timing:** 2 minutes per concept
- Now it's time to bring everything together and make sure everyone on the team is on the same page. The goal is to align everyone's understanding and avoid any misinterpretations by having **the Facilitator cover all** the measurement concepts once more.
- In this step, you as the Facilitator, really just **calling out the main idea** of each concept and just the few elements that really got a lot of heat with the votes from the whole team.
- So, we're already starting to narrow down and help all of us, especially the Decider, to **start narrowing down** from a bunch of different ideas and pieces. This way, we can have a smaller set to choose from.

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



### Step 4: Concept Presentation

- Keep in mind that it's **NOT** about describing every single part of the concept. It's just about calling out those interesting ones that got all of those dots.
- The Facilitator uses the notes that they have taken during the Heatmap Voting exercise.
- Then quickly present each concept, aiming at 2 min per concept. So you'll be calling out:
  - ✓ Concept name (if it has a name)
  - ✓ The big idea
  - ✓ The essential elements with the most "heat"
  - ✓ Address the questions (if any)
- End with this sentence:
  - "Did anyone vote on this for a **different reason** than what I explained?"

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 5: Strawpoll Voting

- **Timing:** 10 minutes
- Conduct a strawpoll vote to allow participants to vote on **the overall dashboard concept** they believe best aligns with the organization's needs and data governance strategy.
- Set a timer for 5 minutes and have participants **silently decide** which concept they think is most appealing (without voting) and best serves our data governance purpose.
- Once they've decided which one they'll choose, they should write their **reasoning** on a sticky note. Make sure they also write the concept name on it.
- Once that's done, we do a **synchronized voting**. This way we make sure that everyone's made that decision without being influenced by anyone else.

## WEEK 3 of 5

### Workshop 5 of 7 | Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



### Step 5: Strawpoll Voting

- **Timing:** 10 minutes
- Give each participant **one large voting dot** and have them write their **initials** on it.
- Set again a timer for 5 minutes, once the time is up, everyone should **vote at the same time** to avoid influencing each other's votes.
- Keep in mind that it's everyone's responsibility to inform the decider.

## WEEK 3 of 5

### Workshop 5 of 7 | Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 6: Present

- **Timing:** 2 minutes per person
- The Facilitator goes over the Strawpoll votes and calls each participant **one by one to explain** to the group :
  1. Which concept they've chosen
  2. Why did they choose it
- The Facilitator needs to take care that the participants don't ramble and **don't take more than one minute** to explain their reasoning.

## WEEK 3 of 5

### Workshop 5 of 7 | Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise

#### 4. Flow



### Step 7: Decider Vote



- **Timing:** 3 minutes
- The Decider reviews the results of the heatmap and strawpoll votes.
- The Decider casts the final vote, selecting **the best dashboard concept** and **integrating key elements** from other concepts, if necessary.
- The Decider has the flexibility to combine features to create the most effective dashboard structure.

## WEEK 3 of 5

### Workshop 5 of 7 | Concept Creation

1. Timing
2. What you'll need
3. Introducing the exercise

#### 4. Flow

### Step 8: Finalizing the Dashboard Layout

- **Timing:** 10 minutes
- Summarize the top-voted elements from the previous voting sessions by **sketching out the target** measurement dashboard on a large sheet (or a whiteboard), incorporating all the top-voted elements and critical parts.
- As you sketch, invite participants to **provide input** and ensure that all critical elements are accurately represented. This collaborative approach helps ensure that everyone's insights are reflected in the final model.
- This final sketch will serve as the blueprint for the data metrics dashboard moving forward, ready to be implemented as part of the data governance program.

## WEEK 3 of 5

### The Language of the Game | Workshop 5 of 7

**Exercise 1.** Metrics Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

#### Round 2: Business Glossary Focus

**Exercise 4.** Lightning Demos

**Exercise 5.** 10 for 10 Brainstorm

**Exercise 6.** Concept Creation

In this second part of the workshop, we focus on something crucial to any successful data governance initiative—building **a common language**.

The "Language of the Game" is all about setting up a **foundational business glossary**, a centralized reference point where everyone in your organization can align on the meanings of critical data terms and elements. By clearly defining these terms and their metadata, we can ensure that there is no ambiguity around the data you manage, share, and analyze.

We'll focus on creating a **Business Glossary template** that captures the most essential metadata for your Critical Data Elements (CDEs) and other important business terms.

## WEEK 3 of 5

### Workshop 5 of 7 | Lightning Demos

**Exercise 1.** Metrics Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

#### Round 2: Business Glossary Focus

**Exercise 4.** Lightning Demos

**Exercise 5.** 10 for 10 Brainstorm

**Exercise 6.** Concept Creation

- **Reference to the previous Lightning Demos exercise** from Exercise 2 in the "Keeping Score" part of the workshop. This time, participants will focus on gathering examples of Business Glossaries and Data Dictionaries.
- Specifically, they should look at the **essential metadata elements** that other organizations use to document their data assets, such as descriptions, data types, definitions, and governance-related metadata.
- The goal is to **get inspired** by how others organize and structure their business glossaries, ensuring participants can bring back useful ideas for the next exercises.

# WEEK 3 of 5

## Workshop 5 of 7 | Lightning Demos

**Exercise 1.** Metrics Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

**Round 2: Business Glossary Focus**

**Exercise 4.** Lightning Demos

**Exercise 5.** 10 for 10 Brainstorm

**Exercise 6.** Concept Creation

- Show some real **examples** before the exercise starts.



**EXCEL**

**Big Idea:**  
A simple data dictionary and business glossary in Excel

**SHAREPOINT**

**Big Idea:**  
Data dictionary in SharePoint, including approval flow

**COLLIBRA**

**Big Idea:**  
Fancy glossary in a high-end tool

# WEEK 3 of 5

## The Language of the Game | Workshop 5 of 7

**Exercise 1.** Metrics Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

**Round 2: Business Glossary Focus**

**Exercise 4.** Lightning Demos

**Exercise 5.** 10 for 10 Brainstorm

**Exercise 6.** Concept Creation

The "10 for 10 Brainstorm" is where the creative ideas flow freely, allowing the group to **generate as many ideas** as possible about what metadata elements we should include in the business glossary.

This exercise is critical because the success of the glossary depends on **capturing the right data** about each Critical Data Element (CDE) and business term. We want to think beyond just the typical fields and get creative, but also practical. What are the metadata elements that will bring the most clarity and value to the organization?

From descriptions and business rules to data quality guidelines and possible values, we will aim to identify every potential metadata element that could help ensure consistency and understanding across the organization.

## WEEK 3 of 5

Workshop 5 of 7 | 10 for 10 Brainstorm

1. Timing Between 15 to 20 minutes
2. What you'll need
3. Introducing the exercise
4. Flow

## WEEK 3 of 5

Workshop 5 of 7 | 10 for 10 Brainstorm

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 3 of 5

### Workshop 5 of 7 | 10 for 10 Brainstorm

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of this exercise is to generate a **wide range of metadata elements** that will help document and define Critical Data Elements (CDEs) and other business terms.
  - The goal is to build a strong foundation for the business glossary by brainstorming every possible metadata element that could provide value, ensuring no stone is left unturned.
  - By the end of this exercise, we'll have a comprehensive list of metadata elements that can be further refined and prioritized, ensuring that our glossary reflects the essential components needed for effective data governance.
  - Only one metadata element per sticky note!

## WEEK 3 of 5

### Workshop 5 of 7 | 10 for 10 Brainstorm

#### Step 1: Generate Ideas

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 5 minutes
  - Each participant should generate **10 ideas for metadata elements**—one idea per sticky note.
  - Encourage them to write quickly and not overthink, focusing on quantity.
  - Focus on generating a **wide variety of ideas**, from the simple and practical to the bold and innovative.
  - Keep the ideas brief and to the point; we'll dive deeper into them later.

## WEEK 3 of 5

Workshop 5 of 7 | 10 for 10 Brainstorm

### Step 1: Generate Ideas

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- Make sure to prepare **some examples!**



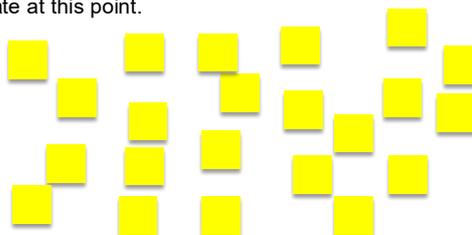
## WEEK 3 of 5

Workshop 5 of 7 | 10 for 10 Brainstorm

### Step 2: Visualize Ideas

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Ask participants to stick their ideas on the designated wall.
- Don't categorize the ideas at this stage—just get them all up there.
- Quickly remove any obvious **duplicates**, but avoid discussion or debate at this point.



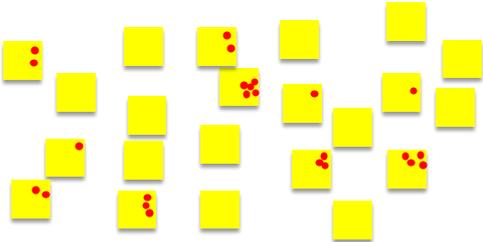
# WEEK 3 of 5

Workshop 5 of 7 | 10 for 10 Brainstorm

## Step 3: Heatmap Vote

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 5 minutes 
- Give every participant **10 voting dots**.
- Let them **silently vote** on the ideas they like the most – avoid discussions.
- Tell them that there are **no voting rules**.



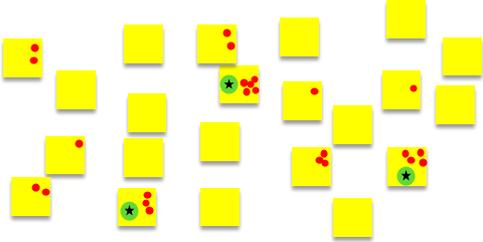
# WEEK 3 of 5

Workshop 5 of 7 | 10 for 10 Brainstorm

## Step 4: Decider Vote

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 5 minutes 
- Give the decider **3 special voting dots**.
- The decider goes last and is encouraged to talk about their decision.
- There are no voting rules here as well.



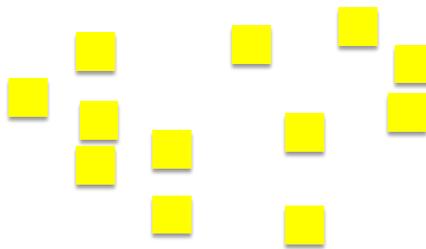
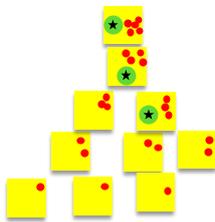
## WEEK 3 of 5

### Workshop 5 of 7 | 10 for 10 Brainstorm

#### Step 5: Revisualize

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Take the **top 10 ideas** with votes on them off the wall.
- Place the ideas in order of most votes next to the wall.



## WEEK 3 of 5

### Workshop 5 of 7 | Concept Creation

- Exercise 1.** Metrics Mapping
- Exercise 2.** Lightning Demos
- Exercise 3.** Concept Creation

#### Round 2: Business Glossary Focus

- Exercise 4.** Lightning Demos
- Exercise 5.** 10 for 10 Brainstorm
- Exercise 6.** Concept Creation

- **Reference to the previous Concept Creation exercise** from Exercise 3 in the "Keeping Score" part of the workshop.
- This time, the objective is to design the **basic layout of a business glossary template** that can be used in Excel, SharePoint or another platform.
- The focus is on creating a structure that integrates the prioritized metadata elements identified in the previous exercises. Each element should have a place in the template.

# WEEK 3 of 5

## Workshop 5 of 7 | Concept Creation

**Exercise 1.** Metrics Mapping

**Exercise 2.** Lightning Demos

**Exercise 3.** Concept Creation

**Round 2: Business Glossary Focus**

**Exercise 4.** Lightning Demos

**Exercise 5.** 10 for 10 Brainstorm

**Exercise 6.** Concept Creation

Data Element	Definition	Data Type	Owner	Source	Data Quality Rule
Customer ID	A unique identifier assigned to each customer in the system.	Number	Sales Director	SAP MDG	Must be unique and not null. No duplicates allowed.
Customer Name	The full legal name of the customer, including titles and surnames.	Text	Customer Service Manager	SAP MDG	Must be filled, no blank or incomplete names allowed.
Email address	The email address provided by the customer for communication and notifications.	Text	Sales Director	Salesforce CRM	Must be in a valid email format (e.g., name@domain.c) and no duplicates allowed.

# Week 3

1

Monday

2

Tuesday

3

Wednesday

4

Thursday

5

Friday

## WEEK 3 of 5

### Designing Governance Essentials | Documentation

The focus for Tuesday's documentation phase is to **refine and finalize the outcomes** of the Keeping Score and Language of the Game workshops held on Monday.

This phase is crucial for transforming rough ideas and drafts into clear, professional, and actionable outputs.

#### Visualize the Measurement Dashboard

- Refine the sketched-out dashboard from the workshop, incorporating the prioritized metrics.
- Create a polished version using PowerPoint, Excel, or a specialized dashboard visualization tool.
- Ensure the final version is easy to interpret and offers actionable insights on CDE data quality and governance KPIs.

#### Prepare the Business Glossary Template

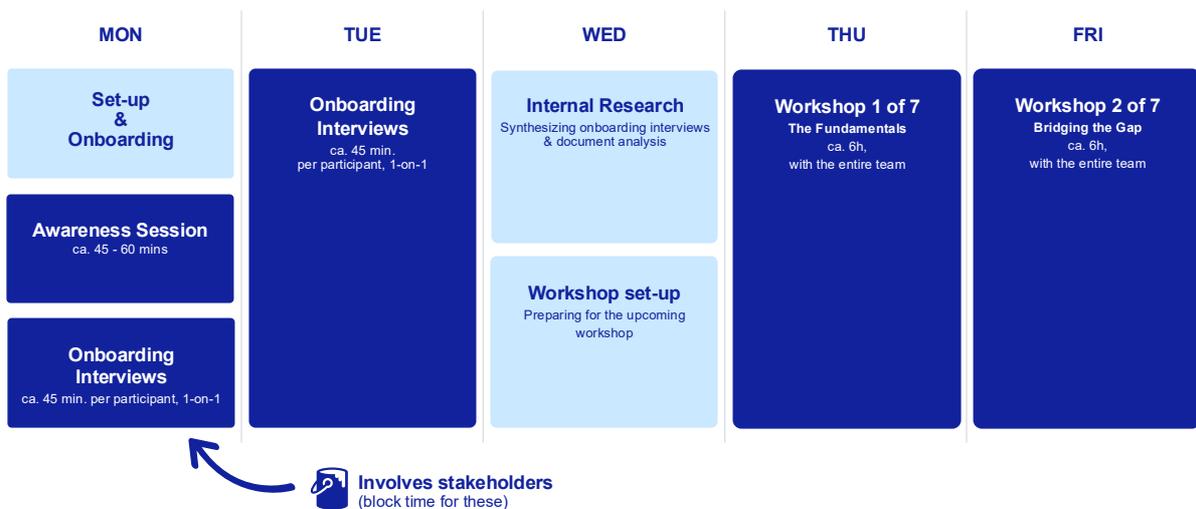
- Draft a functional glossary template in Excel or SharePoint based on the workshop outcomes.
- Ensure that all top-voted metadata elements are included in the template, with space for future additions.
- Align the glossary structure with the prioritized metadata elements to ensure ease of use and scalability.

#### Draft Supporting Guidelines

- Provide clear instructions on how to update the dashboard and glossary regularly, ensuring ongoing governance effectiveness.

## WEEK 1 of 5

### Laying the Groundwork | The Fundamentals



## WEEK 2 of 5

### The Data Players | The Rules of the Game

MON	TUE	WED	THU	FRI
<p><b>Documentation</b> Summarizing the outcomes and draft deliverables</p>	<p><b>Workshop 3 of 7</b> The Data Players ca. 6h, with the entire team</p>	<p><b>Documentation</b> Summarizing the outcomes and draft deliverables</p>	<p><b>Workshop 4 of 7</b> The Rules of the Game ca. 6h, with the entire team</p>	<p><b>Documentation</b> Summarizing the outcomes and draft deliverables</p>
<p><b>Workshop set-up</b> Preparing for the next workshop</p>		<p><b>Workshop set-up</b> Preparing for the next workshop</p>		<p><b>Workshop set-up</b> Preparing for the next workshop</p>

## WEEK 3 of 5

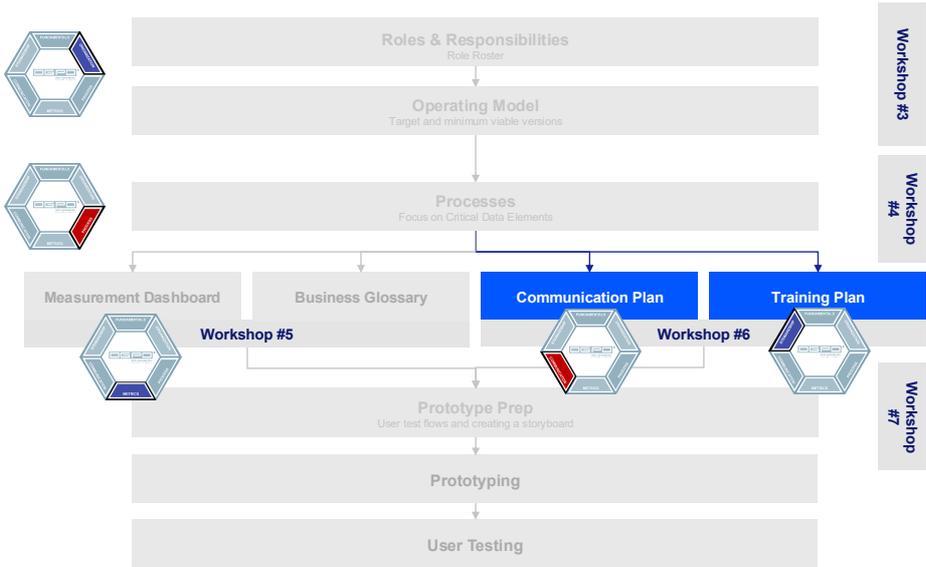
### Designing Governance Essentials | Define & Decide

MON	TUE	WED	THU	FRI
<p><b>Workshop 5 of 7</b> Keeping Score &amp; Language of the Game ca. 6h, with the entire team</p>	<p><b>Documentation</b> Summarizing the outcomes and draft deliverables</p>	<p><b>Workshop 6 of 7</b> Rooting for the Game &amp; Training Camp ca. 6h, with the entire team</p>	<p><b>Workshop 7 of 7</b> Prototype Prep ca. 4h, with the entire team</p>	<p><b>Prototyping</b> Design a hi-fidelity interactive prototype</p>
	<p><b>Workshop set-up</b> Preparing for the next workshop</p>		<p><b>Documentation</b> Summarizing the outcomes and draft deliverables</p>	<p><b>User Recruiting</b> Find and schedule users</p>

# Week 3



## Data Governance SPRINT™



## WEEK 3 of 5

### Designing Governance Essentials | Workshop 6 of 7

#### Rooting for the Game Workshop: Defining Communication Plan

On Wednesday, we'll focus on creating a structured Communication Plan that ensures that data governance efforts are clearly communicated across the organization and that all stakeholders are properly informed.

Effective communication is critical for creating awareness, securing buy-in, and fostering ongoing engagement from stakeholders. We'll explore multiple strategies, prioritize key activities, and craft a detailed communication roadmap.

#### Training Camp Workshop: Defining Training Plan

In the second half of the day, we'll shift our attention to developing a Training Plan that equips all data governance roles with the necessary skills and knowledge.

We will brainstorm training activities and key topics, prioritize the most essential ones, and develop a roadmap to deliver targeted training initiatives that align with our governance milestones.

## WEEK 3 of 5

### Designing Governance Essentials | Workshop 6 of 7

#### Workshop 6: Wednesday Full-Day

- A clear, prioritized plan outlining key communication activities, events, or artifacts, along with timelines for execution.
- Detailed concepts for communication activities, events, or artifacts that will help drive awareness and engagement in the data governance program.
- A structured roadmap for implementing targeted training initiatives, aligned with governance milestones, and tailored to specific roles if needed.
- Concrete ideas for training activities, events, or tools designed to equip key data governance roles with the knowledge and skills they need to succeed.

## WEEK 3 of 5

### Designing Governance Essentials | Workshop 6 of 7

#### Round 1 + 2: Same exercises

- Exercise 1.** Lightning Demos
- Exercise 2.** 10 for 10 Brainstorm
- Exercise 3.** Action Board
- Exercise 4.** Concept Creation
- Exercise 5.** Roadmap

In both the morning and afternoon sessions of this workshop, we will follow the **same series of structured exercises** to guide our discussions and decision-making.

Whether we're focusing on defining the communication plan in the **Rooting for the Game session** or building the training plan in the **Training Camp session**, we'll use a consistent approach to gather ideas, prioritize key initiatives, and turn them into actionable concepts.

By applying the same exercises, we ensure a smooth flow between both sessions, allowing us to effectively brainstorm, vote, and develop roadmaps that will be ready for implementation.

## WEEK 3 of 5

### Workshop 6 of 7 | Lightning Demos

#### Round 1 + 2: Same exercises

- Exercise 1.** Lightning Demos
- Exercise 2.** 10 for 10 Brainstorm
- Exercise 3.** Action Board
- Exercise 4.** Concept Creation
- Exercise 5.** Roadmap

- **Reference to the previous Lightning Demos exercise** from Exercise 2 in the "Keeping Score" part of Monday workshop, but this time with a specific focus.
  - **Morning Session:** focus on gathering examples of communication events, activities, and artifacts related to data governance.
  - **Afternoon Session:** focus on training initiatives for data governance
- The goal is to **get inspired** by how others communicate and provide training within their data governance programs.

# WEEK 3 of 5

## Workshop 6 of 7 | Lightning Demos

Round 1 + 2: Same exercises

**Exercise 1.** Lightning Demos

**Exercise 2.** 10 for 10 Brainstorm

**Exercise 3.** Action Board

**Exercise 4.** Concept Creation

**Exercise 5.** Roadmap

- Show some **real examples** before the exercise starts.

➤ **Morning Session:**



**WEBSITE**

**Big Idea:**  
Data Governance  
SharePoint site

**ARTICLES**

**Big Idea:**  
Quarterly Data Literacy  
articles

**INFOGRAPHIC**

**Big Idea:**  
Engaging infographic  
showcasing the DG  
Program

# WEEK 3 of 5

## Workshop 6 of 7 | Lightning Demos

Round 1 + 2: Same exercises

**Exercise 1.** Lightning Demos

**Exercise 2.** 10 for 10 Brainstorm

**Exercise 3.** Action Board

**Exercise 4.** Concept Creation

**Exercise 5.** Roadmap

- Show some **real examples** before the exercise starts.

➤ **Afternoon Session:**



Data Governance Explained in 5 Minutes



**VIDEOS**

**Big Idea:**  
Short, targeted videos that  
explain data governance

**QUICK REFERENCE  
CARDS**

**Big Idea:**  
Printable or digital cheat  
sheets

**SKILLS MATRIX**

**Big Idea:**  
Outlining the required  
competencies and skills for  
each role

## WEEK 3 of 5

### Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

**Exercise 1.** Lightning Demos

**Exercise 2.** 10 for 10 Brainstorm

**Exercise 3.** Action Board

**Exercise 4.** Concept Creation

**Exercise 5.** Roadmap

- **Reference to the previous 10 for 10 Brainstorm exercise** from Exercise 6 in the "Keeping Score" part of Monday workshop, but this time with a specific focus.
  - **Morning Session:** focus on generating ideas for communication events, activities, and artifacts that will support the rollout and ongoing promotion of the data governance program.
  - **Afternoon Session:** focus on brainstorming training methods, events, activities, and artifacts that will empower and educate the key data governance roles, such as data stewards, data owners, and data custodians.
- The goal is to **generate a wide range of creative ideas** that can be further refined and prioritized for the development of effective communication and training strategies.

## WEEK 3 of 5

### Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

**Exercise 1.** Lightning Demos

**Exercise 2.** 10 for 10 Brainstorm

**Exercise 3.** Action Board

**Exercise 4.** Concept Creation

**Exercise 5.** Roadmap

- Show some **real examples** before the exercise starts.
  - **Morning Session:**



## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

Exercise 1. Lightning Demos

Exercise 2. 10 for 10 Brainstorm

Exercise 3. Action Board

Exercise 4. Concept Creation

Exercise 5. Roadmap

- Show some **real examples** before the exercise starts.
  - **Afternoon Session:**



## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

Exercise 1. Lightning Demos

Exercise 2. 10 for 10 Brainstorm

Exercise 3. Action Board

Exercise 4. Concept Creation

Exercise 5. Roadmap

- Reference to the previous Action Board exercise** from Exercise 2 in “The Fundamentals” workshop of Week 1, but this time with a specific focus.
  - **Morning Session:** focus on prioritizing the communication ideas generated in the 10 for 10 Brainstorm.
  - **Afternoon Session:** focus on prioritizing the training ideas generated in previous exercise.
- Each idea will be evaluated based on its **impact** on the organization and the **effort** required for implementation.
- The goal of the Action Board exercise is to help us determine the **most critical communication and training activities** by focusing on what will deliver the greatest value with the least effort—allowing us to quickly implement impactful initiatives.

## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

### Round 1 + 2: Same exercises

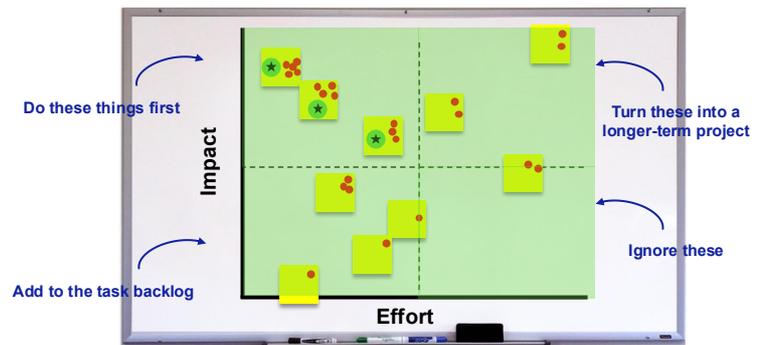
**Exercise 1.** Lightning Demos

**Exercise 2.** 10 for 10 Brainstorm

**Exercise 3.** Action Board

**Exercise 4.** Concept Creation

**Exercise 5.** Roadmap



## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

### Round 1 + 2: Same exercises

**Exercise 1.** Lightning Demos

**Exercise 2.** 10 for 10 Brainstorm

**Exercise 3.** Action Board

**Exercise 4.** Concept Creation

**Exercise 5.** Roadmap

- **Reference to the previous Concept Creation exercise** from Exercise 3 in the "Keeping Score" part of Monday's workshop, but this time with a specific focus.
- For both sessions we will start by selecting the **top 1 to 3 ideas** from the **top left quadrant** of the previous Action Board exercise (those with the highest impact and lowest effort).
  - **Morning Session:** focus on designing detailed concepts that visually demonstrate what these communication initiatives will look like in practice.
  - **Afternoon Session:** focus on developing detailed training concepts, visually illustrating how these initiatives will work and be executed.

## WEEK 3 of 5

### Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

- Exercise 1. Lightning Demos
- Exercise 2. 10 for 10 Brainstorm
- Exercise 3. Action Board
- Exercise 4. Concept Creation
- Exercise 5. Roadmap

- The goal is to **bring the ideas to life**, making them tangible for the team and easier to implement.
- After creating the concepts, we will conduct **voting**:
  - **Heatmap Voting**: Participants will vote on specific elements of the concepts they find most critical or effective.
  - **Strawpoll Voting**: This vote will help identify the concept that best aligns with our communication and training strategy.
  - **Decider Vote**: The final decision-maker will select the concept or elements to move forward with, potentially combining aspects of different ideas.
- The objective of this exercise is to turn the top-voted ideas into well-defined, visual concepts that can be easily understood, tested, and executed.

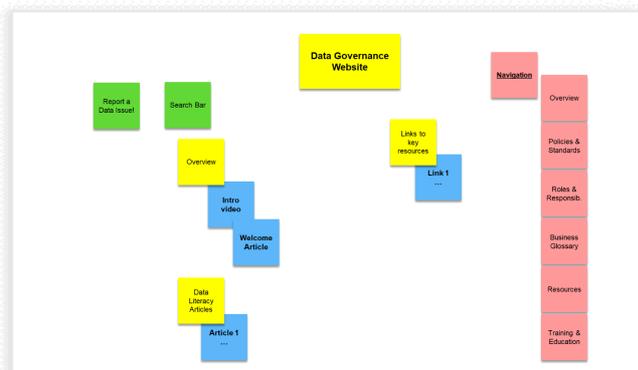
## WEEK 3 of 5

### Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

- Exercise 1. Lightning Demos
- Exercise 2. 10 for 10 Brainstorm
- Exercise 3. Action Board
- Exercise 4. Concept Creation
- Exercise 5. Roadmap

- An example of a **communication concept**:



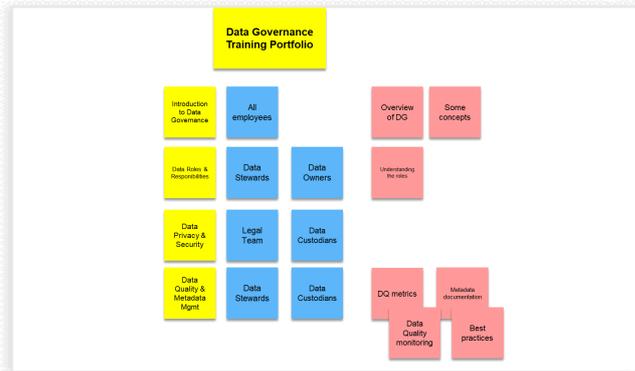
## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

- Exercise 1. Lightning Demos
- Exercise 2. 10 for 10 Brainstorm
- Exercise 3. Action Board
- Exercise 4. Concept Creation
- Exercise 5. Roadmap

- An example of a **training concept**:



## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

- Exercise 1. Lightning Demos
- Exercise 2. 10 for 10 Brainstorm
- Exercise 3. Action Board
- Exercise 4. Concept Creation
- Exercise 5. Roadmap

- **Reference to the previous Roadmap exercise** from Exercise 4 in The Fundamentals workshop of Week 1, but this time with a specific focus.
- For both sessions we will create a **detailed roadmap** using the **top-voted concepts** from the previous Concept Creation exercise. These concepts, along with any **additional top-voted ideas** from the Action Board that didn't make it into concepts, will be positioned on the roadmap.
  - **Morning Session:** focus on placing the communication concepts and additional top-voted communication ideas onto the roadmap.
  - **Afternoon Session:** focus on placing the training concepts and additional top-voted training ideas onto the roadmap.

## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

- Exercise 1. Lightning Demos
- Exercise 2. 10 for 10 Brainstorm
- Exercise 3. Action Board
- Exercise 4. Concept Creation
- Exercise 5. Roadmap

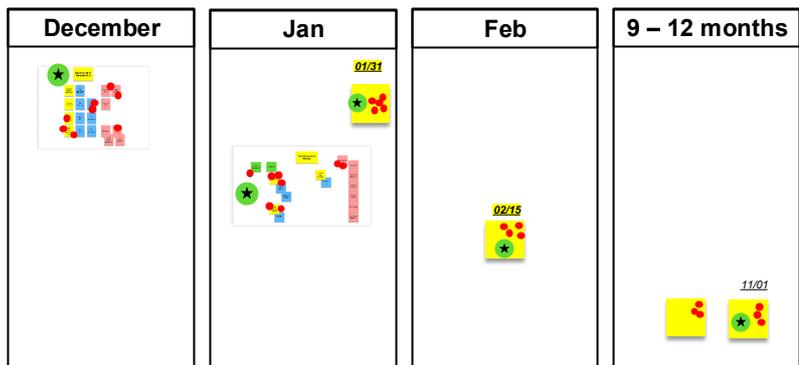
- Define specific phases, organize the initiatives by their priority, and identify **key milestones** to help keep the communication and training rollout on track.
- In both sessions, we will also do an **Accountability Assigner**, where we designate key roles responsible for implementing each part of the roadmap.
- The objective of this exercise is to ensure that we have a **clear, actionable roadmap** for both communication and training strategies, making it easier to coordinate, execute, and track these initiatives as part of the broader data governance rollout.

## WEEK 3 of 5

Workshop 6 of 7 | 10 for 10 Brainstorm

Round 1 + 2: Same exercises

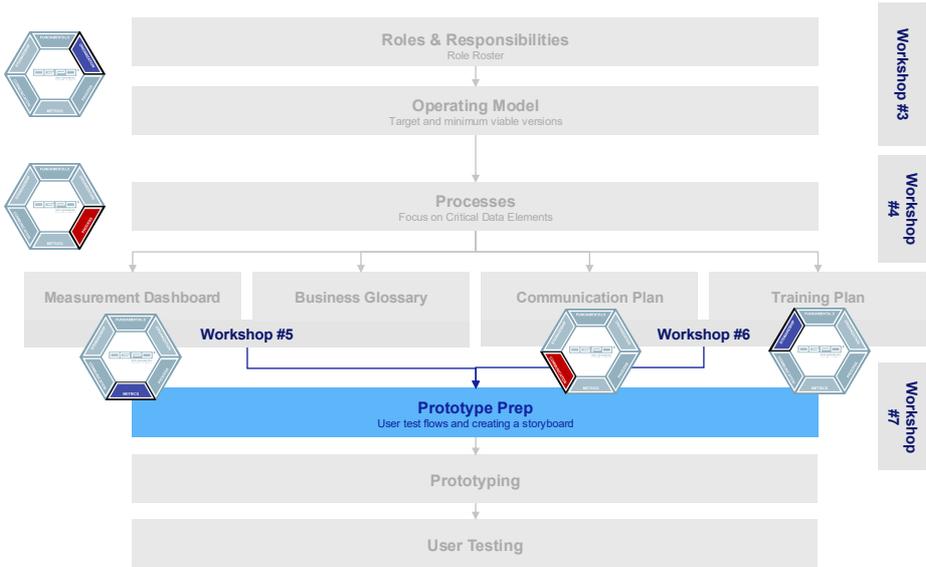
- Exercise 1. Lightning Demos
- Exercise 2. 10 for 10 Brainstorm
- Exercise 3. Action Board
- Exercise 4. Concept Creation
- Exercise 5. Roadmap



# Week 3



## Data Governance SPRINT™



## WEEK 3 of 5

### Prototype Preparation | Workshop 7 of 7

#### Prototype Prep Workshop: Bringing Everything Together

In this final workshop, we bring everything together and begin **preparing the prototypes** that will be used during the testing phase. The goal is to take the elements we've developed so far—such as the process flows, business glossary, measurements dashboard, training materials, and communication plans—and **downsize them into small, actionable prototypes** focused on the top-voted and easily accessible Critical Data Elements (CDEs).

We aim to create a **minimum sustainable version** of key processes like the CDE data quality and CDE metadata documentation process, ensuring they are pragmatic and easy to implement on a small scale. This workshop will zoom in on the **1 to 3 key responsibilities** of essential data roles (data steward, data custodian, and data owner) to test how these roles function in real-world scenarios.

Through two targeted exercises—Users Test Flow and Storyboard—we will establish a clear sequence for prototyping and testing, making the implementation phase smoother and more actionable.

##### Workshop 7: Thursday Half-Day

- Preparing the sequence of steps for each prototype, ensuring we have a clear roadmap for testing once we've settled on the concepts and ideas.
- By using a Storyboard, we create a step-by-step guide that outlines the implementation of each prototype in a clear and concise manner, ensuring all aspects of the chosen solution are covered and ready for testing.

## WEEK 3 of 5

### Prototype Preparation | Workshop 7 of 7

#### Exercise 1. Users Test Flow

#### Exercise 2. Storyboard

In this exercise, we'll focus on creating detailed **user flows for the key data governance roles**—data steward, data owner, and data custodian—specifically in the context of managing data quality and metadata. The goal is to map out how these roles will interact with the processes we've defined, ensuring that the workflows are practical and efficient for our upcoming prototype testing phase.

We'll explore how each of these **roles will engage with the Critical Data Elements (CDEs)** and manage their responsibilities. This will help us identify pain points, optimize the flow, and ensure that each role's actions align with the overall governance objectives. The end result will be a clear map of how these roles operate in practice, giving us a solid foundation for testing and validation in the next phase.

# WEEK 3 of 5

## Workshop 7 of 7 | Users Test Flow

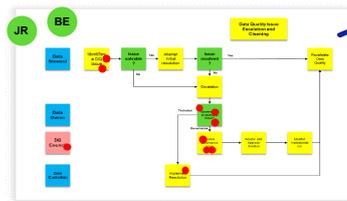
- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

Between 45 to 60 minutes

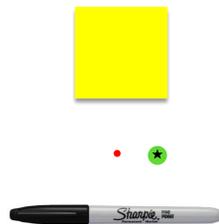
# WEEK 3 of 5

## Workshop 7 of 7 | Users Test Flow

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



Unified Process Map from Workshop #4



## WEEK 3 of 5

### Workshop 7 of 7 | Users Test Flow

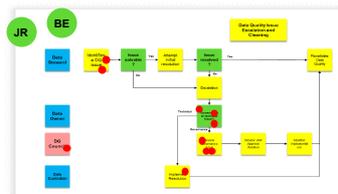
1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of this exercise is to create a **step-by-step scenario**, almost like a movie script, that showcases how a data steward, data owner, and data custodian work together, focusing on both **data quality tasks and metadata documentation**.
  - The aim is to develop a realistic flow of activities, highlighting **key interactions** between the roles, while keeping the process concise with only **3-6 tasks per role**.
  - Goal is to visualize and document how these roles will perform their responsibilities in a real-world scenario.
  - This exercise will result in a detailed **step-by-step activity flow** for each role, ready for prototyping and testing.

## WEEK 3 of 5

### Workshop 7 of 7 | Users Test Flow

#### Step 1: Review the Unified Process Maps

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 5 minutes
  - We will start by reviewing the unified Process Maps created in Workshop #4, ensuring everybody has a **shared understanding** of the processes we defined.
  - Encourage participants to take notes about key elements of the process that they believe should be tested and incorporated in the prototype.



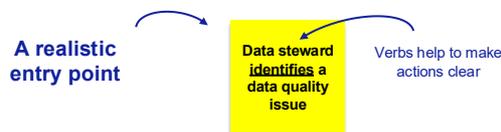
## WEEK 3 of 5

### Workshop 7 of 7 | Users Test Flow

#### Step 2: Define the Entry Point

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 2 minutes
- Find a **realistic starting point** for your scenario. This could be when a data quality issue is flagged, or a metadata update is needed.
- Jot down this entry point on a sticky note.



## WEEK 3 of 5

### Workshop 7 of 7 | Users Test Flow

#### Step 3: Set the Ideal Ending

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 2 minutes
- Determine **an ideal outcome** that the team can realistically test. This could be the resolution of a data quality issue or the completion of a metadata documentation task.
- Write this outcome on a sticky note.



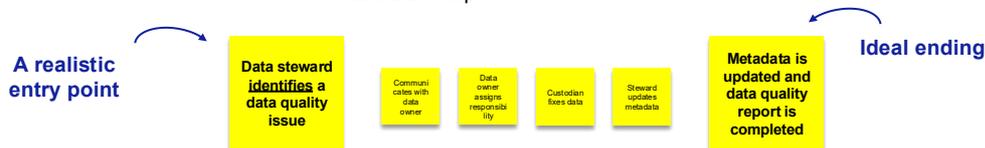
## WEEK 3 of 5

### Workshop 7 of 7 | Users Test Flow

#### Step 4: Fill in the Middle Steps

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 30 minutes
- Use a series of sticky notes to map out **3 to 6 steps per role** (data steward, data owner, and data custodian), making one long timeline. Highlight the **interactions and communication flows** between these roles.
- These steps should focus on the **critical tasks** that must happen, such as monitoring data quality, communicating issues, updating metadata, or decision points where the data owner or custodian steps in.



## WEEK 3 of 5

### Workshop 7 of 7 | Users Test Flow

#### Step 4: Fill in the Middle Steps

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 30 minutes
- Ensure the total number of sticky notes per role is between 3 to 6 steps.
- Each participant will have around **9 to 18 sticky notes** by the end, reflecting the story they think makes the most sense for the users.
- If needed, participants can **limit the roles** to only data steward and data owner to simplify the scenario.



# WEEK 3 of 5

## Workshop 7 of 7 | Users Test Flow

### Step 5: Read out & Stick up

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 2 minutes per person
- One by one, participants will stand up and **read out** their full user story mapping flow.
- As they read, they will **stick up** their steps on the board, following the order they created.
- No explanations or justifications—**just read and stick!**
- As the Facilitator, you can make the process smoother by providing (blue) sticky notes as **guiding axes**—stick 9 to 18 sticky notes across the top for the steps, and as many sticky notes down the side as there are participants.

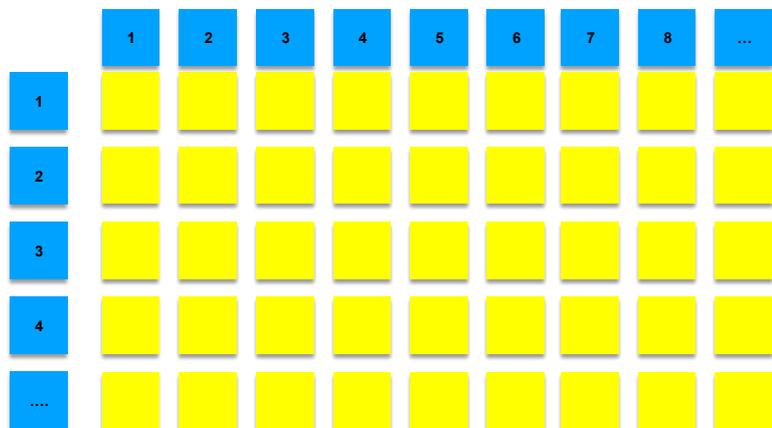
# WEEK 3 of 5

## Workshop 7 of 7 | Users Test Flow

### Step 5: Read out & Stick up

Guiding axes

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



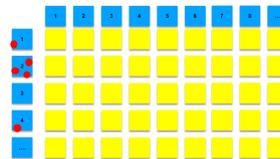
# WEEK 3 of 5

## Workshop 7 of 7 | Users Test Flow

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 6: Voting

- **Timing:** 5 minutes
- Allow participants 5 minutes to **review** the displayed user test flows.
- Each participant gets **one voting dot** (except the Decider) and votes on the row that they believe represents the **clearest and most practical story**.
- The vote is purely based on what they find to be the most understandable and actionable flow.



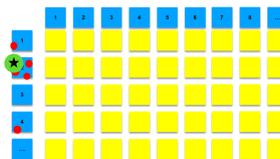
# WEEK 3 of 5

## Workshop 7 of 7 | Users Test Flow

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 7: Decider Vote

- **Timing:** 2 minutes
- The Decider now places their **special voting dot** on the users test flow they believe is the best representation of the story.
- After voting, the Decider should **explain their choice** to the group, giving reasoning for their selection and what made the flow stand out.



## WEEK 3 of 5

### Prototype Preparation | Workshop 7 of 7

#### Exercise 1. Users Test Flow

#### Exercise 2. Storyboard

In this exercise, we will take the **best user story flow** from the previous exercise and transform it into a **detailed, step-by-step guide**, much like a **storyboard for a movie**.

Just as a movie storyboard maps out each scene in sequence, our storyboard will map out each step of the data governance process, focusing on the actions of the **data steward**, **data owner**, and **data custodian**.

The goal is to create a clear, actionable plan that outlines every step necessary for executing the chosen process, including the roles, responsibilities, activities, and key decision points. This storyboard will serve as the blueprint for moving from concept to reality, from prototype to testing.

## WEEK 3 of 5

### Workshop 7 of 7 | Storyboard

#### 1. Timing

Between 1 to 2 hours

#### 2. What you'll need

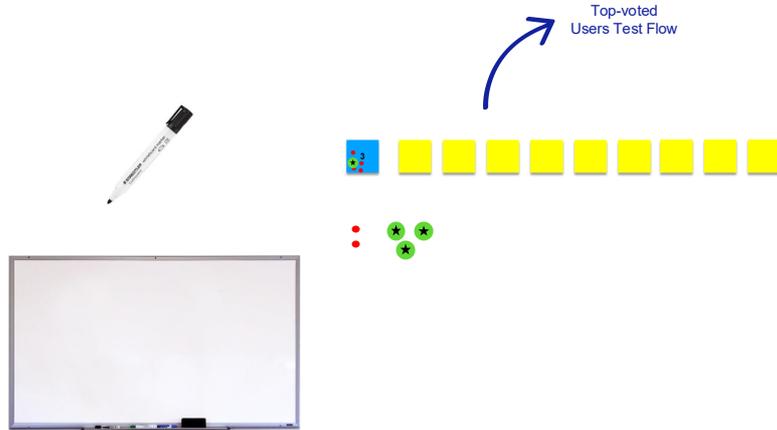
#### 3. Introducing the exercise

#### 4. Flow

## WEEK 3 of 5

### Workshop 7 of 7 | Storyboard

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 3 of 5

### Workshop 7 of 7 | Storyboard

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- The objective of the Storyboard Exercise is to develop a clear and actionable plan that **brings the user story to life**, much like a storyboard in filmmaking.
- By breaking the process down into **detailed, practical steps**, we'll ensure that everyone understands exactly how the data governance tasks should be executed in practice.
- The storyboard will act as a step-by-step guide, outlining the **roles** involved and the **activities** that need to happen at each stage.
- Once complete, this will be your **go-to reference** for creating a prototype and implementing the processes in your data governance testing phase.

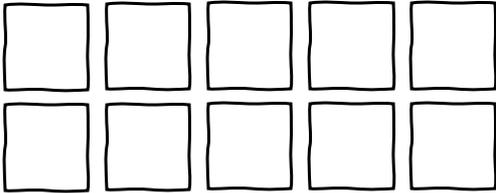
# WEEK 3 of 5

## Workshop 7 of 7 | Storyboard

### Step 1: Sketch Out the Storyboard

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 10 minutes
- A Storyboard generally contains between **10 and 20 boxes** where we draw a user story step-by-step.
- So start by drawing at least 10 boxes or “cells” on the whiteboard (or you can use some masking tape to put it on the wall).



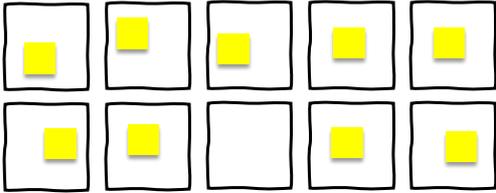
# WEEK 3 of 5

## Workshop 7 of 7 | Storyboard

### Step 2: Break Down the Users Story Flow

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

- **Timing:** 10 minutes
- The goal is to translate the sticky notes from the **top-voted Users Test Flow** into what might happen at each real step along the way.
- Often **one step on the sticky note** might translate into more than one cell. Start by placing those sticky notes inside the boxes.



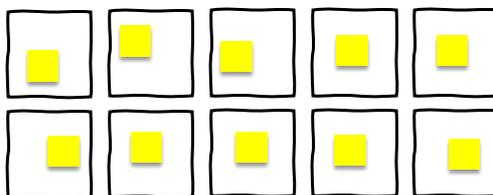
## WEEK 3 of 5

### Workshop 7 of 7 | Storyboard

#### Step 3: Fill in the Details and Missing Pieces

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 minutes
- Look for **any gaps** in the process and add **missing details**.
- Ensure each step has a **clear owner** and includes the necessary activities and decisions.
- Consider the flow of **communication** and **decision points** and ensure they are fully represented.



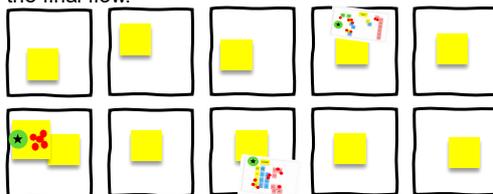
## WEEK 3 of 5

### Workshop 7 of 7 | Storyboard

#### Step 4: Enrich the Storyboard

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 15 minutes
- Review the top-voted **concepts and elements** from the previous workshops. Incorporate these elements into the storyboard by adding sticky notes or concept pictures or print-outs.
- This step will ensure the storyboard reflects the **most valuable insights** from the entire sprint and incorporates the best ideas into the final flow.



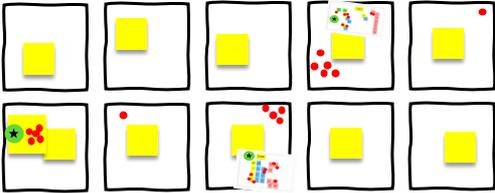
# WEEK 3 of 5

Workshop 7 of 7 | Storyboard

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

## Step 5: Heatmap Voting

- **Timing:** 5 minutes
- Each participant is given **2 voting dots** to place on the most critical steps in the process that they believe need to be tested.
- Participants vote on the steps they feel are **essential for a successful prototype**.
- Use heatmap voting to identify the most high-priority steps.



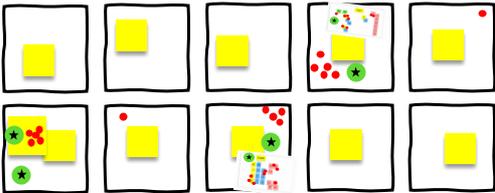
# WEEK 3 of 5

Workshop 7 of 7 | Storyboard

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow

## Step 6: Decider Vote

- **Timing:** 2 minutes
- The Decider is given **3 special voting dots** to select the final steps to be included in the testing phase.
- The Decider can combine elements from different steps and add or remove steps as they see fit.
- The Decider **explains** their final decisions to the group.



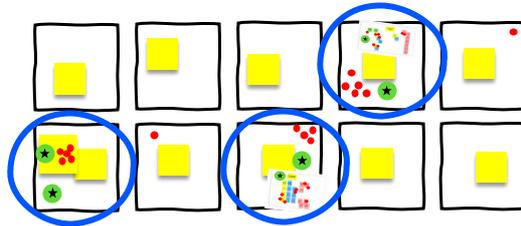
# WEEK 3 of 5

## Workshop 7 of 7 | Storyboard

### Step 7: Decide on focus areas

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

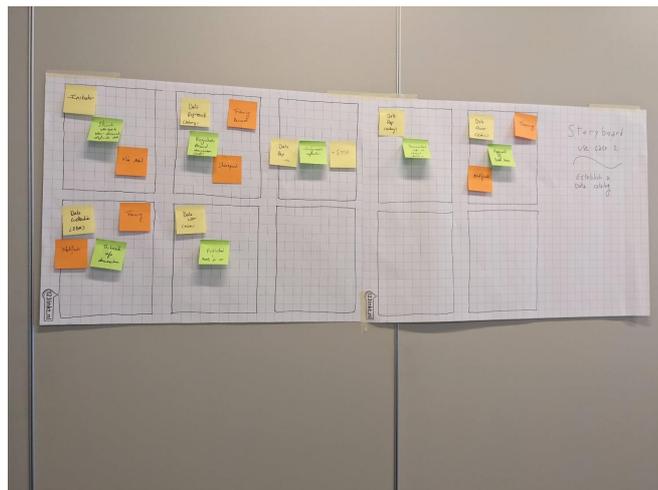
- **Timing:** 10 minutes
- As a group, review the final voted steps and decide on the top **3 focus areas** for prototyping and testing.
- Ensure that the focus areas cover both **data quality** and **metadata management** tasks. These 3 focus areas will form the foundation for the next phase of prototyping.



# WEEK 3 of 5

## Workshop 7 of 7 | Storyboard

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



## WEEK 3 of 5

### Designing Governance Essentials | Documentation

The Documentation Phase on Thursday afternoon focuses on capturing and refining the **results** from the Rooting for the Game and Training Camp workshops held on Wednesday, as well as the **insights** from the Prototype Prep workshop from Thursday morning.

The goal is to **clean up the rough outcomes** and turn them into clear, structured deliverables that can be easily referenced and implemented.

#### Visualize the Communication and Training Plan

- Create a polished, visually appealing version of the communication roadmap, ensuring the top-voted concepts and activities are clearly mapped out and aligned with key governance milestones.
- Draft a detailed training roadmap, including the top-voted concepts, events, and activities.

#### Review and Clean Up the User Story Flow

- Refine the user story flows that were developed for the data steward, data owner, and data custodian, ensuring they are actionable and align with the chosen process for CDE data quality and metadata documentation.

#### Finalize the Storyboard

- Organize and enhance the storyboard created in the Prototype Prep workshop, making it a clear, step-by-step visual guide for the upcoming prototype testing phase.

## Week 3

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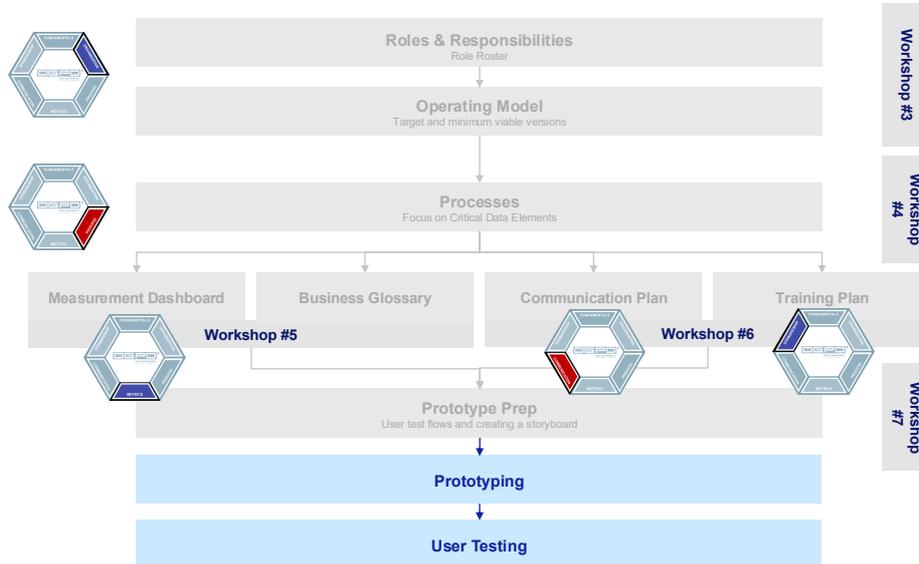
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# Data Governance SPRINT™



## WEEK 3 of 5 Designing Governance Essentials | Prototyping

The Prototype Phase focuses on **building the minimum sustainable version** of the processes we've designed. This includes creating tangible versions of the business glossary, data quality processes, measurement dashboard, and any communication or training materials that have been mapped out.

The objective is to ensure the prototype is **functional, actionable, and testable** so that users can provide valuable feedback during the testing phase.

### Create a Business Glossary Template for Testing

- Prepare a Business Glossary template that the testers can use to document the CDEs.

### Prepare Data Quality Metrics Dashboard

- Set up a simplified version of the data quality dashboard, using real or sample data from the selected CDEs, to track key data quality metrics.

### Develop Simple Training and Communication Materials

- Draft and prepare basic training materials (such as a slide deck) and communication pieces (like emails or posters) related to data quality and metadata management.

### Prepare a Simple Process Flow

- Create a basic process flow diagram that outlines the key steps for managing CDEs, including data quality checks and metadata documentation.

### Set Up Testing Environment

- Ensure all necessary tools, platforms, and resources are in place to facilitate user interaction with the prototype. This includes access to SharePoint, Excel templates, or PowerPoint visualizations.

### Prepare Feedback Channels

- Create clear channels for users to provide their feedback, whether through surveys, feedback forms, or dedicated debrief sessions after each test.

### Finalize Testing Scope

- Clarify which parts of the data governance process will be the focus of the prototype testing.

## WEEK 3 of 5

### Designing Governance Essentials | User Recruiting

The key to a successful prototype testing phase is identifying and recruiting the right test users. For our Data Governance Sprint™, we are looking for a group of about **5 to 10 testers**.

This group should include a mix of data stewards, custodians, and data owners who represent both business and IT perspectives.

The goal of User Recruiting is to **identify and recruit** a select group of stakeholders who will interact with the data governance prototype in the testing phase.

These users will provide **crucial feedback** on how well the prototype functions in real-world scenarios, specifically regarding the management of Critical Data Elements (CDEs).

#### Identify Key Test Users

- Focus on recruiting a mix of **business and IT users**, including data stewards, data owners, and data custodians, who are directly involved in the data governance process.

#### Send Invitations and Ensure Availability

- Block time in the testers' calendars for Thursday and Friday of Week 4 for the Onboarding Session (60-90 minutes) and the initial testing. Consider a placeholder slot of 1 hour per test with 30-60 minutes dedicated to the actual test.

#### One-on-One Feedback Interviews

- Book 30-minute feedback interviews for Monday of Week 5, back-to-back, to collect detailed feedback from each tester.

#### Prepare Onboarding Materials

- Create onboarding documents, including instructions on how to interact with the prototype, what to test, and how to provide feedback.

#### Set Expectations

- Let participants know they should dedicate at least 1 hour to thoroughly test the prototypes.

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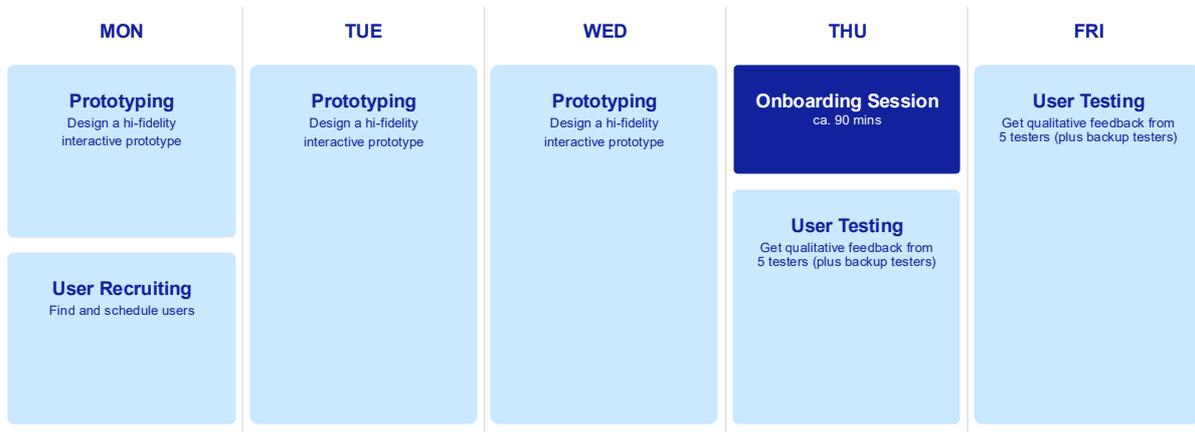
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## WEEK 4 of 5

Design Sprint | Design & Validate



## WEEK 4 of 5

Design Sprint | Design & Validate

### Welcome to Week 4: From Concept to Reality

In Week 4, we transition from planning and concept development into the hands-on phase of **prototyping and validation**. This is the time to bring everything we've built over the past few weeks into tangible forms that can be tested.

We'll start by **refining and creating prototypes** of our core data governance tools—such as the Data Governance Website, the business glossary template, and process documentation—ensuring they are ready for **user interaction**.

By the end of Week 4, our goal is to have not only tested the prototypes but also gathered **initial insights** on how they can be improved. The results of these tests will be critical as we move into the final stages of refining and implementing the data governance program.

## WEEK 4 of 5

Design Sprint | Design & Validate

### Welcome to Week 4: From Concept to Reality

The first part of the week will focus on **finalizing the prototypes**, making sure every piece is aligned with the target roles, responsibilities, and processes we've established. Simultaneously, we will begin the **user recruiting process** to find the right participants for our testing phase.

Towards the end of the week, we will move into **user testing**, which will start with an **Onboarding Session** to brief the testers on the prototypes, the testing goals, and their role in the process. This will help ensure that the feedback is grounded in a real understanding of what the data governance processes are supposed to achieve.

After the onboarding, the **real testing** begins—this is where we'll get our first real glimpse into whether our data governance program can be successfully implemented and whether users can easily follow the processes we've designed.

#### Key Deliverables

- Refined and functional prototypes of key data governance elements (e.g., Data Governance Website, Business Glossary, Process Documentation)
- Onboarded and engaged user testers
- User feedback from initial testing sessions

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## WEEK 4 of 5

### Design Sprint | User Recruiting

Monday marks a critical step in our Data Governance Sprint™ as we finalize our user recruiting efforts.

While prototyping continues in parallel, it's essential to secure a **committed group of 5 to 10 test users** who will interact with our prototypes later in the week. This group should include data stewards, data custodians, and data owners, ensuring a mix of business and IT perspectives.

Invitations should have been sent out ahead of Monday, but the goal now is to **confirm participation** and **lock in time slots** for testing. Make sure all testers are aware of their role, and the timeline for testing, and have clear expectations.

We will also block time for **one-on-one feedback sessions** for Monday of Week 5 to collect more detailed insights from each tester.

#### Key Activities in User Recruiting:

- Follow up with previously identified users to confirm their availability and remind them of their role in the prototype testing.
- Ensure that the Onboarding Session (60-90 minutes) and testing slots (1-hour placeholders) are booked in their calendars for Thursday and Friday. Also, block out time slots for one-on-one feedback interviews for Monday of Week 5.
- Organize and prepare all the necessary onboarding materials so users clearly understand the prototypes and processes they'll be testing.
- Make sure testers know that your team will be available for real-time support during the testing phase (via Slack, Teams, or WhatsApp). Set the stage for a smooth testing experience.

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## WEEK 4 of 5

### Design Sprint | Prototyping

As we move into the early part of Week 4, our focus remains on **building out and refining the prototypes** we started the previous week.

This phase is critical to ensuring that our Data Governance concepts become actionable and tangible. By continuing our work on Monday, Tuesday, and Wednesday, we aim to develop fully functional prototypes that capture the key elements of our governance framework—such as process documentation, business glossary templates, and any tools or visual elements like the Data Governance Website and training material.

The goal is to **prepare these prototypes for user testing and validation**, so that we can start gathering meaningful feedback from our test group later in the week.

#### Key Activities in Prototyping:

- Continue the activities started on Friday previous week.
- Ensure that the prototypes reflect the minimum sustainable version of the Data Governance framework.
- Continue refining process flows for CDE management, data quality, and metadata documentation.
- Refine visual elements and structures for the Business Glossary template and Data Governance Website.
- Begin preparing clear and concise documentation for users to interact with during the testing phase.
- Don't forget preparing the training and communication material, especially for the **Onboarding session** on Thursday!

## WEEK 4 of 5

### Design Sprint | Prototyping

#### Digital Prototypes:

- Try to recycle as much as possible. Reuse parts of existing systems, templates, or content from other departments. Leverage open resources from the internet (e.g., templates, images, data) as long as your prototypes are kept internal.
- **Tools you can use:**
  - Excel, PowerPoint, Word, Visio (for dashboards, charts, and simple templates)
  - SharePoint (for building a mock glossary or governance portal)
  - Miro (for visual collaboration and workflows)
  - Canva (for creating infographics and professional visuals for training/communication)
  - ChatGPT (to generate content or summaries quickly)
  - Unsplash (for high-quality images for your prototypes)
  - Google Docs/Sheets/Slides (collaborative tools for shared document creation)
  - Figma or Adobe XD (for creating interactive prototypes of websites or dashboards)
  - Lucidchart (for mapping data governance process flows with advanced visual tools)
- **Some examples:**
  - Business Glossary Template in Excel or SharePoint, where users can input CDEs, definitions, and metadata for testing.
  - Data Governance website on the intranet with mock sections (policies, roles, processes) for feedback.
  - Flowchart of Data Quality Escalation Process – mapped out using flowchart tools, demonstrating real-world decision-making in data governance.

## WEEK 4 of 5

### Design Sprint | Prototyping

#### Non-digital Prototypes:

- The general idea is to simulate the user experience without relying on actual tech tools. Prototypes should reflect how a process or communication would unfold in real-world scenarios, without requiring a fully-developed digital product.
- **Some examples:**
  - Paper-based Quick Reference Card for data governance roles or guidelines.
  - Data Quality Checklist or a Draft Data Governance Policy that users can follow to ensure compliance.
  - Mock Training Session simulating how key governance roles like Data Stewards and Data Owners would be onboarded.
  - Small-scale pilot testing with real-world CDE data on a non-digital medium (print out CDE reports, manually update metadata, etc.). Physical posters showing data governance roles and their accountability across the organization.
  - Printed Business Glossary used in workshops to demonstrate how CDEs can be documented and managed manually.
  - Paper flowcharts showing data governance escalation or process flows.
  - Printed feedback forms for users to manually provide feedback during training or testing sessions.
  - Interactive role-playing where participants simulate data governance responsibilities using printed materials and scripts.
  - Whiteboard role mappings – Facilitator-led discussions, where roles and processes are assigned using sticky notes to visualize the governance structure.

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## WEEK 4 of 5

### Design Sprint | Onboarding Session

The Onboarding Session will serve as a crucial **60-90 minute info session** where we explain the prototypes, mock processes, tools, and templates that users will be testing.

This session ensures that testers understand the goals, how to interact with the prototypes, and what specific elements they should focus on during testing.

#### Session Breakdown: Part 1

##### Set the Objective

- Provide a clear explanation of the overall goal of the prototype testing—to validate how well the prototypes simulate real-world processes for data quality checks and business glossary documentation for Critical Data Elements (CDEs).
- Reiterate how the testing is crucial for refining the data governance framework and ensuring the viability of the processes, tools, and roles we've established so far.

##### Demonstration of Prototypes

- Walk users through the specific prototypes they will be interacting with, including:
  - Business glossary templates and documentation for CDEs.
  - The data quality measurement process and how it applies to the selected CDEs.
- Highlight key interactions, explain the mock workflows they will follow, and clarify the expectations for the test.
- Offer examples of how a typical interaction might look, from filling in a glossary field to simulating a data quality issue resolution.

## WEEK 4 of 5

### Design Sprint | Onboarding Session

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#### Session Breakdown: Part 2

##### Q&A Session

- Allow testers to ask any questions or raise concerns.
- Encourage open dialogue to ensure participants feel confident and clear about the prototypes, their roles, and the expectations.
- Clarify any confusion about specific prototype features, workflow steps, or roles (e.g., data steward, data owner, data custodian).

##### Logistics

- Confirm the testing schedule, including the time slots blocked for each participant.
- Discuss how feedback will be gathered, whether via collaborative tools (e.g., Slack, Teams, Google Forms) or during one-on-one interviews.
- Highlight the available support channels (e.g., dedicated Slack/Teams group, direct access to team members) and troubleshooting options during testing.
- Ensure participants know that the team will be available on Thursday, Friday, and Monday for any questions or issues that arise during testing.

# Week 4



## WEEK 4 of 5

### Design Sprint | User Testing

The User Testing phase is one of the most critical steps in our Data Governance Sprint™, as it allows us to **validate the prototypes** we've developed against real-world scenarios.

This testing period will simulate the actual processes and tools we plan to implement for managing data quality and documenting metadata for Critical Data Elements (CDEs).

During this phase, testers will work through the mock processes we've created, provide **real-time feedback**, and help us identify **areas for improvement**.

This combination of structured testing and open feedback will ensure that we walk away with a clear understanding of what works, what needs refinement, and how we can enhance the prototypes to ensure their success when fully deployed.

### Key Elements: Part 1

#### Dedicated Testing Time

- Each user will be assigned a 1-hour testing slot to explore the prototypes thoroughly.
- Ensure participants have enough time to interact with the following key components:
  - Business glossary templates (testing the documentation of CDEs).
  - Data quality measurement process (testing the monitoring and reporting functions).
- Encourage users to test the entire flow, from data quality checks to metadata documentation for CDEs, allowing them to experience the full scope of the prototype.

#### Feedback Collection

- Ask participants to document their experiences during the test. Encourage them to provide detailed feedback on:
  - Ease of use and clarity of the prototypes.
  - Any pain points or areas that are unclear.
  - Potential improvements or suggestions for refinement.
- Use collaborative tools (Slack, Teams, WhatsApp) to maintain open communication during the testing period, ensuring any questions or concerns are addressed promptly.
- Have a centralized platform (e.g., shared document or form) where users can log their feedback in real-time.

## WEEK 4 of 5

### Design Sprint | User Testing

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### Key Elements: Part 2

#### Troubleshooting Support

- The team will be available for real-time troubleshooting during Thursday, Friday, and Monday to assist with any issues users may encounter while testing the prototypes.
- Encourage users to reach out for support when they face problems with the prototype or workflows.
- Prepare for technical or process-related challenges by setting up dedicated support channels and assigning team members to respond quickly.

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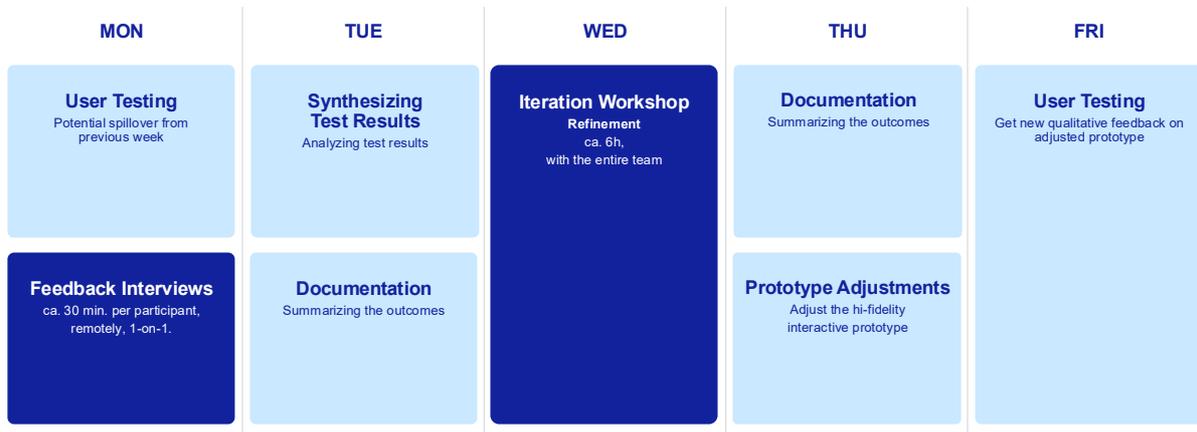
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## WEEK 5 of 5

Design Sprint | Refine & Implement



## WEEK 5 of 5

Design Sprint | Refine & Implement

### Welcome to Week 5: The Final Stretch

In Week 5, we enter the critical phase of **refining and implementing** our data governance solutions, putting the finishing touches on everything we've built and tested so far.

This is the culmination of our Data Governance Sprint™—where we turn insights from user feedback into **actionable adjustments**, ensuring our prototypes are not just functional but optimized for **real-world use**.

This week is all about refinement, ensuring that we leave with a strong, actionable version of our prototypes that can be **scaled confidently** and with momentum. It's the final push towards making the Data Governance Sprint a success, ensuring that the groundwork is set for long-term adoption and growth.

## WEEK 5 of 5

### Design Sprint | Refine & Implement

#### Welcome to Week 5: The Final Stretch

The week kicks off on **Monday** with the continuation of user testing. Any spillover from Week 4's user testing sessions will be completed, and we'll dive deep into **one-on-one feedback interviews** with our testers. These 30-minute interviews will provide crucial qualitative insights into how well the prototypes simulate real-world processes, identify specific pain points, and offer suggestions for improvement. By the end of the day, we aim to have a comprehensive collection of user feedback to guide our next steps.

**Tuesday** is dedicated to synthesizing the results from the testing phase. We'll document the insights collected, create a **feedback wall** to visualize common themes, and begin to identify opportunities for improvement.

This thorough analysis of the feedback will allow us to approach the **Iteration Workshop** on **Wednesday** with clear objectives in mind. The goal of the workshop will be to refine our prototypes based on user input and adjust them for further implementation and scaling.

On **Thursday**, we will document the outcomes of the iteration workshop and finalize the updated prototypes. We'll prepare them for **additional testing** and ensure they are ready for **target user testing**, focusing on the improvements made. By the end of the week, we'll have the **foundational elements** of our data governance program polished and ready for wider implementation.

#### Key Deliverables

- Synthesized Feedback from user testing
- Refined and adjusted prototypes based on real-world feedback
- User Interviews capturing qualitative insights
- Targeted user testing to validate improvements

## Week 5

1

Monday

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Tuesday

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## WEEK 5 of 5

### Design Sprint | User Testing

As we continue with the **User Testing** phase that started in Week 4, the focus remains on collecting valuable feedback from our testers to further refine and improve the prototypes.

During this phase, our goal is to test the effectiveness of the data governance processes and tools in a real-world scenario.

Each participant will interact with the prototypes, giving us insights into what works well and what requires adjustment. The insights we gather will play a crucial role in shaping the final versions of the prototypes.

#### Key Activities in User Recruiting:

- Ensure all previously identified test users complete their 1-hour testing slots to fully explore the prototypes, including tools, templates, and processes.
- Actively collect and document feedback as it comes in through collaborative tools (Slack, Teams, WhatsApp). Focus on capturing qualitative insights on the usability and effectiveness of the prototypes.
- Be available for real-time support during testing hours. Address any issues or confusion the users encounter to maintain the flow of the testing phase.
- Begin compiling the feedback and testing results to prepare for the iteration workshop later in the week, ensuring the most critical feedback is flagged for discussion and action.

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

The Feedback Interviews on Monday of Week 5 are an essential step in **gathering in-depth qualitative insights** from users on how well the prototypes performed.

These **30-minute interviews** help us dive deeper into understanding their experience, pinpointing areas of improvement, and validating successful aspects of the prototypes.

By facilitating these discussions in a structured manner, we can ensure we gather critical feedback that will guide our iterations.

#### Two-Person Team

- Each interview will ideally involve two facilitators: one person leading the interview and interacting with the test user, and the second person taking detailed notes.
- Ensure both facilitators are well-versed in the prototype and the overall goals of the sprint. Review the Feedback Wall to guide the interview questions and structure.

#### Set the Right Tone

- Make the interviewee comfortable. Emphasize that it's the prototype being tested, not them.
- Encourage the user to think out loud to capture their reasoning.

#### Use a Feedback Wall

- The Feedback Wall is a visual tool used to track and categorize real-time feedback during testing and interviews, ensuring both positive and negative responses are captured for future action.
- Use green sticky notes for positive feedback and yellow sticky notes for misunderstandings, confusions, or negative feedback.

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 1: Introduction

- **Timing:** 2 minutes
- Greet the participant warmly and thank them for their time and effort during the user testing process.
- Explain that this interview is a reflection on their experience with the prototypes and that the goal is to gather feedback for improving the system.
- Emphasize that there are no right or wrong answers and that their honest feedback is crucial.
- Reassure the participant that **we're testing the prototypes, not them.**

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 2: User Reflection

- **Timing:** 10 minutes
- Ask the test user to reflect. Prompt the participant to walk through their **overall experience** with the prototypes.
- **Example questions:**
  - "How did the prototypes align with your expectations for data quality and metadata management?"
  - "What stood out to you as particularly easy or difficult?"
  - "Were there any points where you felt stuck or unsure about what to do?"
  - "What aspects of the prototype did you find most useful or beneficial?"
  - "How well do you think this system would work in your day-to-day role?"

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 2: User Reflection

- **Focus on Pain Points:** Dig deeper into any areas of difficulty:
  - "Can you tell me more about the specific challenges you faced?"
  - "Were there any features or processes that felt counterintuitive or unclear?"
- **Highlight Benefits:** Ask about the positive aspects of the prototypes:
  - "What do you think works well in this system?"
  - "Which features do you see adding the most value to your role?"

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 3: Detailed Exploration of Key Areas

- **Timing:** 10 minutes
- **Delve into Specific Topics:** Structure this part of the interview around the core functionalities of the prototypes. For example:
  - **Data Quality Management:** "How effective did you find the data quality monitoring process? Was there anything missing or unclear?"
  - **Metadata Documentation:** "Was it easy to document and retrieve metadata for the Critical Data Elements (CDEs)? What improvements would you suggest?"
  - **Roles & Responsibilities:** "How well did the system support the interaction between data stewards, owners, and custodians?"

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### Step 3: Detailed Exploration of Key Areas

##### 1. Interview Structure

##### 2. Feedback Wall

- **Use the Feedback Wall as a Guide:**
  - Refer to the notes from the Feedback Wall to prompt the user on specific areas they provided input on.
  - For example:
    - *"During the testing, you mentioned that the business glossary was difficult to navigate. Could you expand on that?"*

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### Step 4: Closing Feedback and Suggestions

##### 1. Interview Structure

##### 2. Feedback Wall

- **Timing:** 5 minutes
- **Wrap up with Open Questions:** Give the user space to offer any additional thoughts or suggestions. Ask questions like:
  - *"If you could make one change to the process, what would it be?"*
  - *"Is there anything we haven't discussed that you think is important?"*
- **Probe for Actionable Suggestions:** Encourage the participant to provide ideas for improvement:
  - *"What's one improvement that would make this process easier to use in your role?"*

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 5: Wrap-Up

- **Timing:** 3 minutes
- **Summarize Key Takeaways:**
  - Briefly summarize what you've learned from their feedback to ensure alignment.
  - Let the user know how their feedback will be used to refine the prototype.
- **Thank Them Again:**
  - Thank the user for their participation and valuable input.
  - Confirm the next steps, if any, such as the timing of future testing or follow-up.
- **Documentation:**
  - After the interview, ensure that all feedback is documented on the Feedback Wall (green for positive feedback, yellow for challenges).

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 1: Setting Up the Feedback Wall

- **General Layout:**
  - On a large sheet of paper (or whiteboard), create two axes: the **vertical axis** for general topics/talking points (e.g., navigation, dashboard, glossary), and the **horizontal axis** for the test users and their time slots.
  - Across the top, list the **test participants** and their scheduled interview times.
  - Along the side, list the **specific topics** or areas of the prototype that you will focus on during the feedback session.

# WEEK 5 of 5

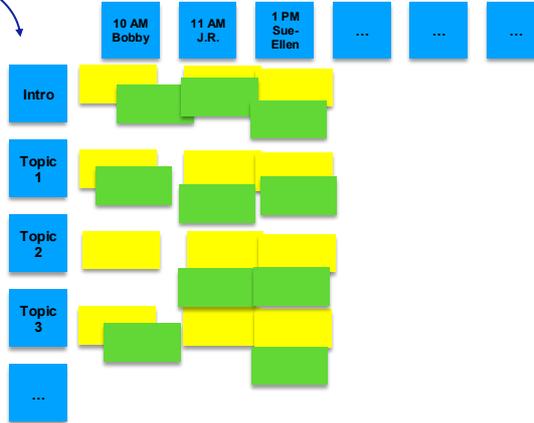
## Design Sprint | Feedback Interviews

1. Interview Structure

2. Feedback Wall

General topics + talking points

Names of people + timing



# WEEK 5 of 5

## Design Sprint | Feedback Interviews

1. Interview Structure

2. Feedback Wall

### Step 1: Setting Up the Feedback Wall

Sticky Notes Setup:



- **Green sticky notes** will represent positive or affirming feedback, highlighting areas where users found the prototype useful, clear, or effective.



- **Yellow sticky notes** will represent negative or confusing feedback, identifying where users struggled, felt unclear, or encountered issues.

- Have plenty of both colors on hand for note-taking during each test session.

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 2: Filling in the Feedback Wall

- **Recording Feedback:**
  - As users walk through the prototype, one team member will ask questions and lead the discussion while the other documents feedback on the sticky notes.
  - For every comment or piece of feedback given by the participant, a sticky note is placed on the wall under their name and next to the relevant topic.
- **Classifying Feedback:**
  - As soon as feedback is captured, quickly categorize it into **positive** (green) or **negative/confusing** (yellow) notes.
  - Use concise language when writing the notes (e.g., "Found the glossary search intuitive" or "Confused by metadata input process").

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 2: Filling in the Feedback Wall

- **Topic-Specific Feedback:**
  - For each topic listed (e.g., "Navigation," "Business Glossary," "Data Quality Dashboard"), capture user-specific feedback and assign it to the corresponding topic and user time slot.
  - If feedback covers multiple areas, you may add another sticky note in a different section or add a connecting line.
- **Tracking Trends Across Users:**
  - As more users provide feedback, look for **patterns or recurring themes**. If multiple users give similar feedback, place these sticky notes in the same area to visually indicate frequency.
  - If you see several yellow sticky notes clustering around one topic, it may indicate a need for a design overhaul or deeper investigation.

## WEEK 5 of 5

### Design Sprint | Feedback Interviews

#### 1. Interview Structure

#### 2. Feedback Wall

### Step 3: Completing the Feedback Wall

- **End of the Day Review:**
  - At the end of each day, **review the Feedback Wall** with your team.
  - Analyze the number of green vs. yellow notes to gauge where the prototype is strong and where adjustments are needed.<sup>4</sup>
- **Organizing Key Takeaways:**
  - For each topic or prototype element, summarize the key findings. Focus on the areas with the most feedback and begin planning how these insights will inform the iteration process.
  - Use the feedback to refine the prototype and address any issues before additional testing or rollouts.
- **Documentation:**
  - Once feedback has been synthesized and discussed, **document all key points** digitally or in a summary report for reference during the **Iteration Workshop** or future development sprints.

## Week 5

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Monday

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Tuesday

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## WEEK 5 of 5

### Design Sprint | Synthesizing Test Results

Tuesday morning is all about digging into the feedback from our user testers. This is the time to really understand **what worked well** and **what needs some attention**.

We'll take all the insights from Monday's interviews and start turning them into real, actionable improvements.

It's about **connecting the dots**—spotting any recurring pain points, identifying bottlenecks, and figuring out where we can make things better.

The goal is to refine our prototypes, ensuring they align more closely with what our users need and making sure we're set up for success in the next phase.

#### Review and Analyze Feedback Wall

- Begin by revisiting the feedback wall, reviewing both the positive (green) and negative (yellow) sticky notes from Monday's interviews.
- Look for common themes in the feedback—pain points, bottlenecks, or repeated issues across users.

#### Identify Bottlenecks and Highlight Improvement Areas

- Pinpoint any steps in the process or prototype where users encountered obstacles or confusion.
- Prioritize the areas of improvement that can bring the most value or impact to the user experience.

#### Define Key Learnings

- Document what worked well for the users, focusing on which parts of the prototypes or processes resonated most.

## WEEK 5 of 5

### Design Sprint | Documentation

In the afternoon, it's time to get organized and formalize everything we've learned. This is where we turn all those notes and feedback into a **clear, concise report**.

We'll outline the key test results, pull together the most important insights, and lay out a solid plan for improvements.

This documentation isn't just paperwork—it's what will **guide us as we move forward**, ensuring that we're making well-informed decisions in the upcoming Iteration Workshop.

It's about capturing everything in a way that sets us up for smooth progress and makes sure nothing important gets lost in the shuffle.

#### Consolidate Findings

- Pull together the key insights from the morning session into a structured format, summarizing the critical feedback and identified pain points.

#### Create a Report

- Draft a comprehensive report outlining the test results, areas for improvement, and actionable next steps for the prototypes.

#### Visualize Improvements

- Sketch or map out potential solutions to address the identified pain points, and document these alongside the report.

#### Prepare for Iteration Workshop

- Ensure that all insights and suggestions are organized and ready for use in the iteration workshop on Wednesday.

# Week 5



## WEEK 5 of 5

### Design Sprint | Iteration Workshop

#### Iteration Workshop: Refining for Success

Welcome to the Iteration Workshop, where we take everything we've learned from our user testing and **make it better**. Today is all about getting hands-on with the feedback we've gathered and transforming those insights into improvements for our data governance prototypes.

It's our chance to spot what's working well and **tackle the pain points** head-on. We'll kick off by reviewing what the users told us, and then we'll dive into exercises that let us brainstorm, create, and refine. By the end of the day, we aim to have **sharper, smarter prototypes** that are ready for the next stage. This is the workshop where everything comes together, so let's roll up our sleeves and build something great!

##### Iteration Workshop: Wednesday Full-Day

- Refined prototypes based on user feedback, ensuring improved tools for data governance.
- A clear understanding of what's working, what's not, and actionable insights to guide improvements.
- Strategic priorities and focus areas identified, setting the direction for the next steps.
- Finalized concepts chosen through team discussions and voting, ready for further development.

## WEEK 5 of 5

### Design Sprint | Iteration Workshop

#### Exercise 1. Review Feedback

#### Exercise 2. Sailboat

#### Exercise 3. Strategic Questions

#### Exercise 4. Lightning Demos

#### Exercise 5. Concept Creation

In this first exercise, the facilitator will guide the team through a **concise review of the feedback** gathered from our user testing sessions.

This is a **focused session** where we'll quickly get an overview of the key insights—both positive and negative—that were captured during testing.

This step is crucial as it sets the stage for the rest of the day, helping us understand what areas of the prototypes need refinement. There's **no discussion** in this part, just a clear presentation of the findings to ensure everyone is on the same page.

## WEEK 5 of 5

### Iteration Workshop | Review Feedback

#### 1. Timing

Limit to maximum 30 minutes

#### 2. What you'll need

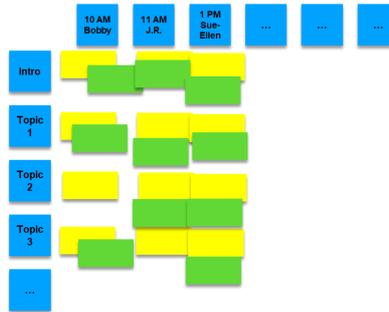
#### 3. Introducing the exercise

#### 4. Flow

# WEEK 5 of 5

## Iteration Workshop | Review Feedback

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



# WEEK 5 of 5

## Iteration Workshop | Review Feedback

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- The objective of this exercise is to provide a **quick, focused overview** of the key takeaways from user testing.
- The purpose is to **highlight areas** for improvement and validate what's working.
- This exercise will lead to a clear understanding of the major insights, setting the direction for the next steps.
- Only the Facilitator is speaking. There is no discussion!

## WEEK 5 of 5

### Iteration Workshop | Review Feedback

Iteration

5

Exercise 1

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

#### Step 1: Facilitator Overview

- **Timing:** 15 minutes
- The facilitator reviews the feedback report, presenting the main findings from the user testing.
- Go through the **Feedback Wall**, highlighting key comments, both positive and negative.

## WEEK 5 of 5

### Iteration Workshop | Review Feedback

Iteration

5

Exercise 1

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

#### Step 2: Report Review

- **Timing:** 10 minutes
- The facilitator summarizes the formal feedback report that compiles the key insights.
- Focus on areas like pain points, areas for improvement, successes, and opportunities.

## WEEK 5 of 5

Iteration Workshop | Review Feedback

### Step 3: Key Takeaways

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 5 minutes
  - The facilitator wraps up by summarizing the top 3-5 key takeaways from the feedback.
  - These takeaways will guide the next steps and inform the following exercises.

## WEEK 5 of 5

Design Sprint | Iteration Workshop

**Exercise 1.** Review Feedback

**Exercise 2.** Sailboat

**Exercise 3.** Strategic Questions

**Exercise 4.** Lightning Demos

**Exercise 5.** Concept Creation

Now that we've reviewed the feedback, it's time to dig deeper using the Sailboat exercise. This fun and interactive method helps us visualize what's **moving us toward success** (our winds) and **what's holding us back** (our anchors).

By identifying these factors, we can **strategically focus** on the opportunities that will propel our data governance program forward and tackle the challenges that could slow us down.

It's a creative way to get everyone thinking and collaborating, helping us set priorities for our next steps.

## WEEK 5 of 5

Iteration Workshop | Sailboat

1. Timing

Between 30 to 45 minutes

2. What you'll need

3. Introducing the exercise

4. Flow

## WEEK 5 of 5

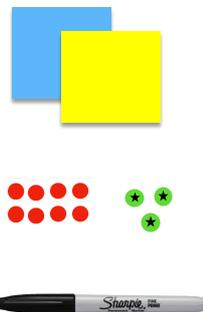
Iteration Workshop | Sailboat

1. Timing

2. What you'll need

3. Introducing the exercise

4. Flow



## WEEK 5 of 5

### Iteration Workshop | Sailboat

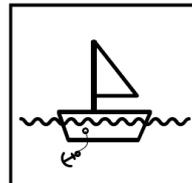
1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of this exercise is to identify the forces driving success and the obstacles slowing us down in our data governance program.
  - The purpose is to **prioritize key issues** to focus on during the rest of the workshop.
  - This will lead to a clear understanding of the **enablers and blockers**, setting the stage for strategic action.

## WEEK 5 of 5

### Iteration Workshop | Sailboat

#### Step 1: Setting the Scene

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 5 minutes
  - Draw a simple sailboat on a whiteboard or flip chart.
  - The facilitator explains the Sailboat metaphor: the **boat** represents the current state of the data governance program, the **wind** propels us forward, and the **anchors** hold us back.
  - Make sure to emphasize that everyone should focus on realistic and actionable insights.



## WEEK 5 of 5

### Iteration Workshop | Sailboat

#### Step 2: Moving us Forward

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Each participant writes down on sticky notes the factors (winds) that are helping the data governance program **move toward success**.
- These could be existing strengths, resources, or positive feedback.



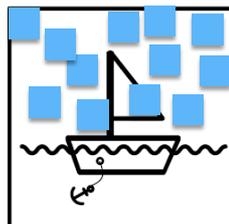
## WEEK 5 of 5

### Iteration Workshop | Sailboat

#### Step 3: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 5 minutes
- Each participant walks to the Sailboat **one by one** and presents their "positives" to the rest of the group.
- Once a member has presented their positive, they stick it to the top half of the sailboat. There should be **no discussion** here, only reading directly from the sticky note.



### Step 4: Holding us Back

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

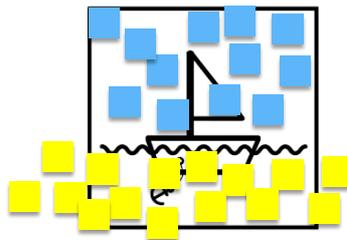
- **Timing:** 10 minutes
- Each participant writes down **the obstacles** (anchors) that are slowing progress. These could be challenges, pain points from the feedback, or missing elements.
- Stick these on the wall under the "Anchors" section of the sailboat.



### Step 5: Present

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

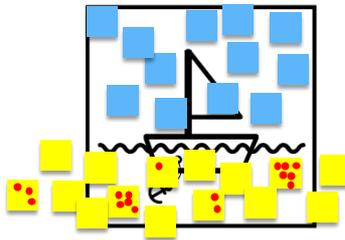
- **Timing:** 5 minutes
- Again, each participant walks to the Sailboat **one by one** and presents their "negatives" to the rest of the group.
- Once a member has presented their negatives, they stick it to the top half of the sailboat. There should be **no discussion** here, only reading directly from the sticky note.



1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 6: Vote

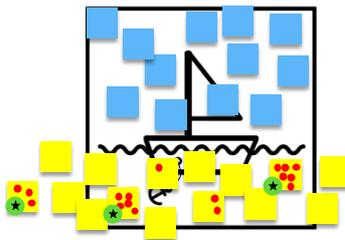
- **Timing:** 5 minutes 
- Give every participant **8 voting dots**.
- Let them **silently vote** on the negatives/challenges they felt held the team back the most.
- Tell them that there are **no voting rules**.



1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

### Step 7: Decider Vote

- **Timing:** 5 minutes 
- Give the Decider **3 special voting dots**.
- The Decider places the voting dots on the **most critical anchors** that need immediate attention.
- The Decider should **briefly explain** their choices to the group.



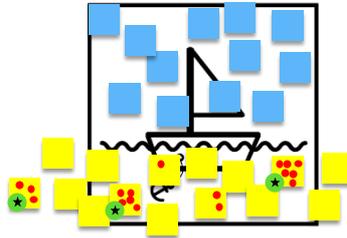
# WEEK 5 of 5

Iteration Workshop | Sailboat

## Step 8: Revisualize

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

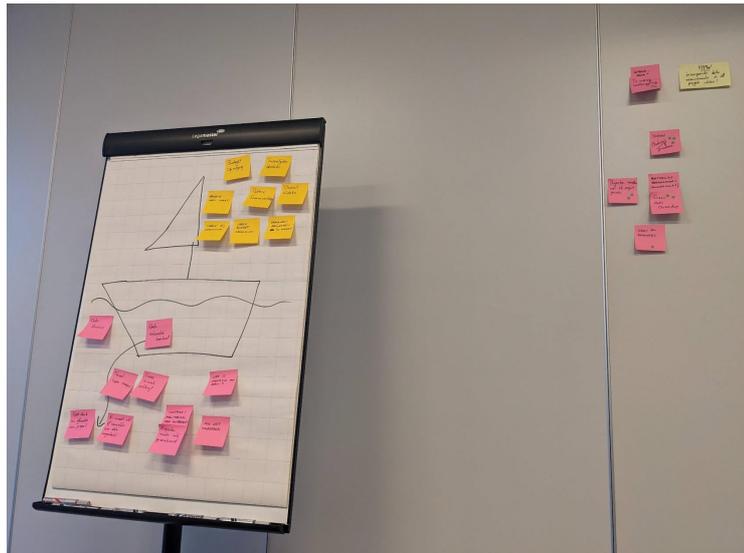
- **Timing:** 1 minute
- Take negative stickies with votes off the board (ignoring anything with less than 2 votes).
- Place these stickies in order of most votes next to the board.



# WEEK 5 of 5

Iteration Workshop | Sailboat

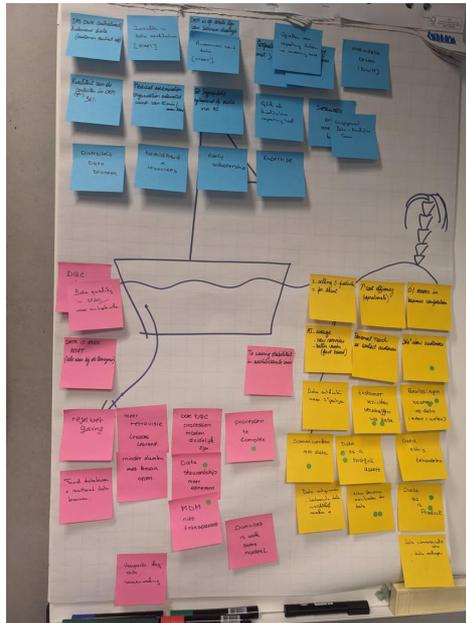
1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow



# WEEK 5 of 5

## Iteration Workshop | Sailboat

- 1. Timing
- 2. What you'll need
- 3. Introducing the exercise
- 4. Flow



# WEEK 5 of 5

## Design Sprint | Iteration Workshop

- Exercise 1. Review Feedback
- Exercise 2. Sailboat
- Exercise 3. Strategic Questions
- Exercise 4. Lightning Demos
- Exercise 5. Concept Creation

Now that we've identified the key obstacles (anchors) holding us back and the driving forces (winds) pushing us forward, it's time to frame the **critical, strategic questions** that will help us overcome these challenges.

These questions will **guide our focus**, ensuring that we tackle the most important issues and move closer to achieving our data governance goals.

By phrasing our questions starting with **"Can we..."**, we'll frame the problems in a way that encourages concrete solutions and allows us to answer with a clear yes or no.

# WEEK 5 of 5

Iteration Workshop | Strategic Questions

1. Timing

Between 45 to 60 minutes

2. What you'll need

3. Introducing the exercise

4. Flow

# WEEK 5 of 5

Iteration Workshop | Strategic Questions

1. Timing

2. What you'll need

3. Introducing the exercise

4. Flow



# WEEK 5 of 5

## Iteration Workshop | Strategic Questions

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- The objective of the exercise is to **identify and phrase strategic questions** that hold us accountable for overcoming critical obstacles.
  - Focus is to ensure that each question **directly addresses the key issues** holding us back, helping us define clear, actionable goals.
  - Important is **the framing**. Questions should start with "Can we..." to ensure they are actionable and can be answered definitively.

# WEEK 5 of 5

## Iteration Workshop | Strategic Questions

### Step 1: Explanation

1. Timing
  2. What you'll need
  3. Introducing the exercise
  4. Flow
- **Timing:** 5 minutes
  - The facilitator **explains** the purpose of the exercise and how to frame questions starting with "Can we...".
  - Remind participants that the questions should directly **address the most critical anchors** identified in the Sailboat exercise.



# WEEK 5 of 5

## Iteration Workshop | Strategic Questions

### Step 2: Write “Can We” Questions

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 - 15 minutes
- Ask each participant to individually write down **2-3 strategic questions** on sticky notes that start with “Can we...”.
- Encourage them to focus on how to resolve the most pressing obstacles.
- Limit to one question per sticky note.



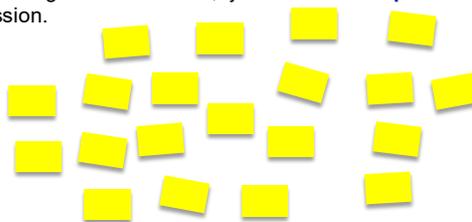
# WEEK 5 of 5

## Iteration Workshop | Strategic Questions

### Step 3: Visualize

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 2 minutes
- One by one, each participant **reads out** their questions and sticks them on the board.
- There should be **no discussion** or debate at this stage—just present and move on.
- Don't categorize the ideas, just **remove duplicates** without discussion.



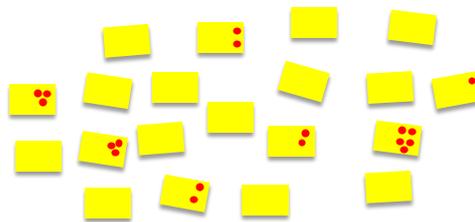
# WEEK 5 of 5

## Iteration Workshop | Strategic Questions

### Step 4: Votes

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 minutes
- Give every participant (but not the Decider) **2 voting dots** and ask them to choose the “Can We”-questions they feel **MUST be addressed** if they want to successfully achieve their purpose.



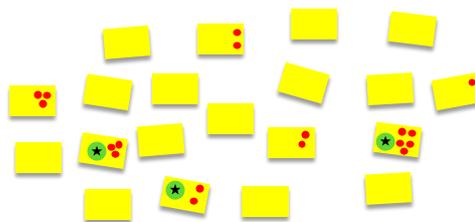
# WEEK 5 of 5

## Iteration Workshop | Strategic Questions

### Step 5: Decider Vote

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 10 minutes
- Give the Decider **three special voting dots** and allow them to choose one “Can We”-questions that they think absolutely must be addressed.



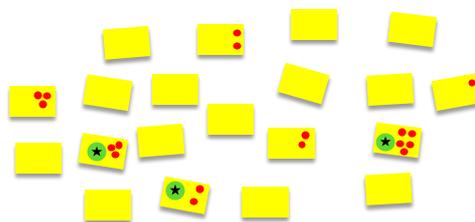
## WEEK 5 of 5

### Iteration Workshop | Strategic Questions

#### Step 6: Revisualize

1. Timing
2. What you'll need
3. Introducing the exercise
4. Flow

- **Timing:** 1 minute
- Give the Decider **three special voting dots** and allow them to choose one "Can We"-questions that they think absolutely must be addressed.



## WEEK 5 of 5

### Design Sprint | Iteration Workshop

**Exercise 1.** Review Feedback

**Exercise 2.** Sailboat

**Exercise 3.** Strategic Questions

**Exercise 4.** Lightning Demos

**Exercise 5.** Concept Creation

- For this Lightning Demos exercise, please *refer to the instructions from Exercise 2 in the Keeping Score section of Week 3's workshop.*
- In this session, participants will search for real-world examples of how other companies have addressed the same kinds of challenges we identified in our Strategic Questions (Exercise 3). The goal is to **get inspired** by innovative solutions and approaches that can inform our own data governance program.

# WEEK 5 of 5

## Design Sprint | Iteration Workshop

**Exercise 1.** Review Feedback

**Exercise 2.** Sailboat

**Exercise 3.** Strategic Questions

**Exercise 4.** Lightning Demos

**Exercise 5.** Concept Creation

- For this Concept Creation exercise, *refer to the instructions from Exercise 3 in the Keeping Score section of Week 3's workshop.*
- Each participant will **create 2 to 3 concepts** that address the top-voted Strategic Questions.
- These concepts will aim to provide clear, actionable solutions. After the concept creation, a **3-layer voting process** (heatmap, strawpoll, and decider vote) will help prioritize which ideas to take forward.

# Week 5

1  
Monday

2  
Tuesday

3  
Wednesday

4  
Thursday

5  
Friday

## WEEK 5 of 5

### Design Sprint | Documentation

The Documentation Phase on Thursday is an essential step in ensuring all outcomes from the Iteration Workshop are **clearly defined and captured**.

This structured session helps us formalize the insights gathered, transforming them into detailed reports and actionable deliverables for the next steps of the DG Sprint™.

The goal of this phase is to **consolidate** all feedback, **refine** the prototypes, and **create** a clear plan for the **final testing phase** on Friday. Proper documentation ensures that we are aligned with the user feedback and ready for the last user testing iteration before full implementation.

#### Consolidate Outcomes

- Review and clean up the rough notes, feedback, concepts, and action points from the Iteration Workshop.
- Summarize the insights and key takeaways from the Iteration Workshop.
- Ensure all the adjustments and priorities identified are clearly documented.

#### Create Structured Documents

- Transform insights into clear, well-documented reports, such as summaries of user feedback, identified bottlenecks, and recommended changes.

#### Prepare Adjustments Brief

- Highlight key areas of focus and recommended changes to be addressed during the Prototype Adjustments session in the afternoon.

## WEEK 5 of 5

### Design Sprint | Prototype Adjustments

The Prototype Adjustments phase on Thursday afternoon is where we take the feedback from the Iteration Workshop and apply it directly to our prototypes.

This **hands-on session** focuses on **refining the prototypes** to better align with user needs, addressing any identified pain points, and preparing them for the final user testing phase on Friday.

This phase is crucial for ensuring that the prototypes are optimized and ready for testing, and it sets the stage for gathering actionable insights from the upcoming user testing session.

#### Apply Adjustments to the Prototypes

- Adjust the prototypes based on the key insights from the Iteration Workshop.
- Ensure that any bottlenecks, pain points, and feedback are addressed. The aim is to ensure the prototypes are practical and aligned with the identified needs.

#### Finalize for Testing

- Prepare the prototypes for guided user testing, ensuring they are functional and meet the criteria identified in previous workshops.

#### Update Documentation

- As the prototypes are adjusted, ensure that all corresponding documentation—such as process flows, user roles, and data governance policies—are updated to reflect the changes made.

#### Prepare for User Testing

- Once the adjustments are made, prepare the prototypes for the next day's User Testing. This includes ensuring that everything is clear, organized, and ready for users to interact with during the testing session.

# Week 5



## WEEK 5 of 5 Design Sprint | User Testing

The User Testing phase on Friday is a critical step where we bring the refined prototypes back to a **select group of users for testing**.

This time, it's more focused and guided, ensuring that we **validate the improvements** made during the Prototype Adjustments phase.

Our goal is to collect deeper insights into how well the adjustments address the feedback received and whether the prototypes are ready for scaling and implementation.

### One-on-One Guided Testing Session

- The testing session will be conducted through one-on-one guided interviews with a selected group of data stewards, custodians, and owners.
- Each user will test the adjusted prototypes through a structured, guided walkthrough by the Facilitator, ensuring they understand the changes and how the adjusted prototypes and processes work in practice.

### Real-Time Feedback Collection

- Gather immediate feedback using the **Feedback Wall** system. Users will express what works, what still needs improvement, and any additional pain points or confusion they encounter during the testing.

### Post-Test Reflection

- At the end of each session, ask users to reflect on their overall experience with the adjusted prototypes, ensuring we capture both short-term reactions and more thoughtful insights.

# Week 6+



## WEEK 6+

LiftOff | Embedding & Scaling Data Governance

### Next Steps After the Data Governance Sprint™

As we wrap up the Data Governance Sprint™, it's important to reflect on the solid foundation we've built in just five weeks.

Throughout this DG Sprint™, we have **designed**, **tested**, and **refined** core elements of a data governance framework that can be scaled and embedded within the organization.

The journey, however, doesn't end here—**this is just the beginning**. The next phase is **LiftOff**, where we transition from prototypes to fully operational systems, further embedding governance practices and scaling them across the organization.

## WEEK 6+

### LiftOff | Embedding & Scaling Data Governance

1. Further Implement Use Cases
  2. Mature Prototypes into Full Solutions
  3. Embed Data Governance Processes
  4. Scale Through Agile Implementation
  5. Monitor & Measure Success
  6. Strengthen Training and Communication
- Based on the roadmap developed during the sprint, it's time to **implement the additional use cases** that were identified as critical to achieving long-term success.
  - Each use case will follow an **agile, iterative approach** to ensure rapid progress, continuous improvement, and measurable results.
    - **Start small** by focusing on the most immediate and impactful use cases, such as improving data quality for key business operations or ensuring compliance with regulatory requirements.
    - **Expand iteratively:** As each use case is implemented successfully, learn from the process and apply those insights to subsequent use cases, scaling governance across different business units or departments.

## WEEK 6+

### LiftOff | Embedding & Scaling Data Governance

1. Further Implement Use Cases
  2. Mature Prototypes into Full Solutions
  3. Embed Data Governance Processes
  4. Scale Through Agile Implementation
  5. Monitor & Measure Success
  6. Strengthen Training and Communication
- The prototypes we developed and tested during the sprint now need to be matured into **fully functional, stable products and processes**. This involves refining the prototypes based on user feedback, ensuring scalability, and aligning them with organizational requirements.
    - **Refine the Business Glossary:** Transition from a basic glossary to a robust, centralized repository of business terms, definitions, and metadata for CDEs.
    - **Optimize data quality monitoring:** Standardize the monitoring processes developed in the sprint, embedding them into regular workflows with automatic checks, alerts, and corrective actions.
    - **Documentation and automation:** Ensure all workflows, processes, and governance procedures are documented and, where possible, automate routine tasks for improved efficiency.

## WEEK 6+

### LiftOff | Embedding & Scaling Data Governance

1. Further Implement Use Cases
  2. Mature Prototypes into Full Solutions
  3. Embed Data Governance Processes
  4. Scale Through Agile Implementation
  5. Monitor & Measure Success
  6. Strengthen Training and Communication
- We will ensure that the data governance tools and processes are **integrated into daily operations**, not just as standalone efforts but as part of the organization's core functions. This includes training the teams to work effectively with these processes, communicating the value, and securing ongoing buy-in from stakeholders.
    - **Operationalize roles:** Embed the defined roles of data stewards, data custodians, and data owners across departments. Ensure clear accountability and ownership of data governance tasks.
    - **Institutionalize workflows:** Standardize processes for data quality, metadata management, and governance. Ensure they are regularly reviewed, improved, and scaled across business areas.
    - **Drive cultural change:** Encourage data governance to become part of the organization's culture by continuously communicating its benefits and successes.

## WEEK 6+

### LiftOff | Embedding & Scaling Data Governance

1. Further Implement Use Cases
  2. Mature Prototypes into Full Solutions
  3. Embed Data Governance Processes
  4. Scale Through Agile Implementation
  5. Monitor & Measure Success
  6. Strengthen Training and Communication
- Continue to apply the agile methodology for further scaling the governance framework across the organization. This includes regular iteration, stakeholder feedback, and adjustments to meet evolving business needs.
    - **Agile sprints for governance:** Just as in this DG Sprint™, use agile principles to iteratively develop governance processes and tools, with regular cycles of testing, feedback, and improvement.
    - **Expand the scope:** Apply the DG Sprint™ approach to new departments or new governance challenges such as data privacy, security, or regulatory compliance, ensuring flexibility and responsiveness to change.
    - **Continuous stakeholder engagement:** Maintain engagement with stakeholders at all levels to gather input, address concerns, and ensure the governance framework evolves to meet changing needs.

## WEEK 6+

### LiftOff | Embedding & Scaling Data Governance

1. Further Implement Use Cases
  2. Mature Prototypes into Full Solutions
  3. Embed Data Governance Processes
  4. Scale Through Agile Implementation
  5. Monitor & Measure Success
  6. Strengthen Training and Communication
- Set up a **continuous improvement process** to monitor the effectiveness of the data governance program, leveraging the metrics dashboards and KPIs developed during the DG Sprint™. This will ensure we are always progressing and adapting to changes.
    - **Track progress:** Use the governance KPIs (e.g., data quality metrics, policy compliance rates, data steward onboarding rates) to measure success and identify areas for improvement.
    - **Adjust and adapt:** Regularly review metrics to identify any areas where governance initiatives are falling short and adapt strategies accordingly.
    - **Maintain transparency:** Regularly communicate performance metrics and governance progress with all stakeholders to ensure continued alignment and buy-in.

## WEEK 6+

### LiftOff | Embedding & Scaling Data Governance

1. Further Implement Use Cases
  2. Mature Prototypes into Full Solutions
  3. Embed Data Governance Processes
  4. Scale Through Agile Implementation
  5. Monitor & Measure Success
  6. Strengthen Training and Communication
- Effective data governance requires everyone in the organization to understand their role and the importance of data governance processes. A **targeted training and communication strategy** is essential to ensuring this.
    - **Training programs:** Provide tailored training for different data governance roles (e.g., data stewards, custodians, owners) to ensure they can carry out their responsibilities effectively.
    - **Communication campaigns:** Develop a communication strategy to ensure that all employees understand the data governance framework and how they contribute to its success.
    - **Ongoing education:** Embed continuous learning through workshops, internal webinars, and regular updates on new governance developments.

## WEEK 6+

LiftOff | Embedding & Scaling Data Governance

### Next Steps After the Data Governance Sprint™

As we move forward with LiftOff, the focus shifts to making data governance a core part of the organization's culture. The prototypes will evolve into **embedded practices and capabilities** that not only improve data quality but also enhance decision-making, transparency, and compliance across the organization.

By continuously implementing the use cases on the roadmap, maturing our prototypes into fully integrated solutions, and scaling the framework using agile methodologies, we will ensure that data governance drives real business value and creates a **sustainable data-driven culture** where you manage your data as an asset.

## Keys to Success

1

**6 Laws of  
Facilitation**

2

**Setting  
Yourself Up for  
Success!**

3

**Giving  
Instructions**

4

**Danger of  
Troublemakers**

5

**Remote  
Workshops**

---

## Mastering the Data Governance Sprint™: Keys to **SUCCESS**

Success in any workshop doesn't happen by chance—it's about having the right mindset, the right tools, and the right approach. In this section, we'll dive into the **six laws of workshop facilitation**, giving you the fundamental principles to guide any session toward a successful outcome.

We'll also tackle how to **handle troublemakers**, ensuring you stay in control when disruptions arise. And for those working in the world of **hybrid and remote settings**, I'll share strategies on how to adapt your facilitation techniques to keep remote participants engaged and productive.

Get ready to elevate your facilitation game—whether in person or online, these tips will help you confidently lead workshops that deliver real results.

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### Keys to Success

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## Law #1: Be the **GUIDE**, not the hero

Your role as a Workshopper is to help others get to where they need to go in the most efficient and enjoyable way possible.

As Gandalf was the guide to Frodo in The Lord of the Rings, you are the guide to your participants in the workshop.

In your mind, you should always be thinking of ways to make your workshop participants the “heroes” of whatever project you’re facilitating.

### Key Tips

- Don't give advice to your participants
- Asking questions and summarizing what participants say
- Highlighting individual participants and their wins and contributions

---

## Law #2: Manage **ENERGY** like it's a delicate, finite resource

One of the worst and most common habits of an amateur Workshopper is building and running workshops that leave participants feeling drained rather than energized at the end of the day.

Multiple studies have shown that the average company employee can only stay productive/switched on for 3 hours per day! (2 hours 53 minutes to be exact)

### Key Tips

- Be very generous and careful with your schedule
- Only 3 hours of your workshop will be productive.
- Actually provide a detailed schedule for the day - include all breaks!
- Be flexible!

---

## Law #3: **START** strong, **END** stronger

There are two phenomena of the human brain that 90% of Workshoppers don't take advantage of: one is called the Serial-position effect, the second is the Peak–end rule.

In a nutshell: people are going to remember the start of the workshop, the end of the workshop and mayyyybe one high peak in the middle. But that's about all you can hope for.

Start the workshop strong, end the workshop stronger and you'll run more memorable workshops than 90% of people.

### Key Tips

- End with a highlight session
- Showing the progress that happened in the workshop
- Find the rituals that work for you

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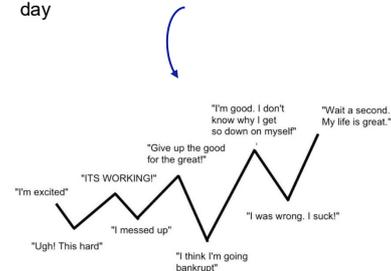
## Law #4: Set and get **EXPECTATIONS**

Nothing kills a workshop faster than mismanaged expectations. If your client or team are expecting one thing and they get another, then no combination of amazing workshop design and skillful facilitation will fill that gap.

That gap between expectations and reality has to be closed before the workshop starts, and constantly observed during the duration.

### Key Tips

- Onboard the participants before the workshop starts
- In the workshop itself! Set and get expectations
- Show people an Emotion Graph of the day



---

## Law #5: Beware of the curse of **KNOWLEDGE**

The Curse of Knowledge is a cognitive bias that occurs when an individual, communicating with other individuals, unknowingly assumes that the others have the background to understand.

Don't assume that everybody knows what to do. Don't expect that people in the room understand what you mean.

### Key Tips

- Create your workshop with the beginners mindset
- Your participants don't know the big picture of the workshop
- Watch your language

---

## Law #6: **IMPROVISATION** is key

A great workshopper is a master improviser. They can redesign the workshop on the fly as the goalposts move. They can completely scrap their plans in an instant and mould the experience to whatever the situation needs.

Most importantly: they've mastered the art of Workshopping to the extent that none of this requires a lot of energy. It just happens.

### Key Tips

- Keep your cool
- Plan for the worst
- Know your exercises

# Keys to Success

- 1 6 Laws of Facilitation
- 2 Setting Yourself Up for Success!
- 3 Giving Instructions
- 4 Danger of Troublemakers
- 5 Remote Workshops

## Setting yourself up for **SUCCESS!**



Intro & Warm-Up



Set Ground Rules



Set & Get Expectations



Agenda & Structure

---

## Intro & WARM-UP

A vital part to your workshop's success is getting people to **feel engaged** and switched on right from the start.

Always start with an easy, **ice-breaker exercise** to activate the group and set the tone for participants to be engaged.



---

## ICE-BREAKER exercise: Who's sitting next to you?

**Write # 1.** Name

**Write # 2.** First job

**Write # 3.** What you learned

- Get the participants a sticky note and ask them to write down 3 things (name, first job, what you learned from that job).
- Then, let them **one by one** tell their story to the group.
- In case the group is too big, you can ask the participants to break into groups of 3-5.
- Do it yourself first so that they can see how it works!

---

## Set ground **RULES**

This is so important yet very easy to miss! All you need to do is make your **ground rules clear** to the participants **up front**. You'll save yourself a lot of questions that would otherwise interrupt the flow of your workshop.

Do it all up front and you'll be able to remind people of the rules later without losing the trust of your participants.

***“The ground rules for this workshop are...”***



---

## Types of ground **RULES**

- No devices
- No judging
- Break every 90 mins

***“Is everybody okay with this rule?”***

## Set and get EXPECTATIONS

This step alone will make your workshops a lot smoother to run.

It's natural for people to assume that they are the only one feeling **overwhelmed** or finding something **difficult**. You can reduce this simply by telling people what to expect, and how they might feel during the process.

Equally important to setting expectations is getting them from your participants!



## SETTING expectations

1. It's common that this might feel too rushed
2. Often it will feel like we're losing ideas
3. This might feel uncomfortable
4. It's normal to not have any ideas yet
5. It's normal to feel like it's not going to work

- Saying a few sentences about how participants can expect to feel throughout the day drastically improves the smoothness and feeling in the room!
- It's very important to say these things before participants feel them. If you say it after, it's already too late.
- Confirm the participants to **trust the process**.
- You can always draw an emotional rollercoaster



## GETTING expectations

1. What are you hoping to get out of this?
  2. What will make this worthwhile for you?
  3. Why did you come here today?
- Asking your participants what they **hope to get out** of this workshop will make them feel heard and help you know which topics to focus more attention on.
  - You can always point to a participant and ask what they're expecting to gain from the workshop. Write their answer down on a sticky note and put it on the wall.

## Agenda and STRUCTURE

It's important to communicate the agenda of the workshop, either by displaying it physically in the room or by repeatedly showing it in the slide deck.

This will give people a sense of **orientation** so they never have to wonder about where they are in the workshop or how much more there is to go.

It also helps avoid people asking what's coming next, which can break your flow and confidence as a facilitator.



# Keys to Success

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Remote Workshops

## Giving clear **INSTRUCTIONS**

One of the main things you will be doing as a Facilitator is asking people to do exercises. This trips up most facilitators! People often do not know how to describe an exercise to somebody.

Giving clear instructions sounds obvious, but is easily forgotten or overlooked.

Luckily there is a super simple framework for teaching exercises!



---

## Formula for giving clear INSTRUCTIONS

### 1. What is the exercise

- *Hey everyone, we're about to dive into an exercise called "How Might We".*

### 2. Why are we doing the exercise

### 3. How do you do the exercise

---

## Formula for giving clear INSTRUCTIONS

### 1. What is the exercise

- *The "How Might We" exercise is a super simple way for us to transform our challenges and problems into clear statements. These clear statements will then serve as the foundation for creating awesome solutions.*

### 2. Why are we doing the exercise

- *The reason we're doing this is because we need a standardized system for generating those solutions.*

### 3. How do you do the exercise

---

## Formula for giving clear INSTRUCTIONS

### 1. What is the exercise

### 2. Why are we doing the exercise

### 3. How do you do the exercise

- *Here's how you do it: you start by writing "HMW" on the top left of your post-it, like this. "HMW" stands for "how might we".*
- *Next, when you hear the expert in the room share the challenges she's facing, pay attention. If you come across a negative challenge or statement, like for example, "We don't have executive sponsorship for our data governance program!", that's your cue to turn it into a "How Might We" statement.*
- *Think of it as an opportunity, something we can create a solution from.*
- *So, in this case, the statement would become "How might we ensure executive sponsorship for our data governance program?". See, all you're doing is transforming a negative problem or statement into an opportunity statement.*
- *It's a simple yet powerful way to approach challenges and find solutions.*

---

## The 3x RULE

**1<sup>st</sup> time.** 50% of participants hear you

**2<sup>nd</sup> time.** 75% of participants hear you

**3<sup>rd</sup> time.** 95% of participants hear you

- No matter how hard we try to pay attention, the truth is we often can't sustain focused attention for long periods of time, and certainly not for the length of a whole workshop.
- **Don't expect all people to listen all the time.** Therefore, you should build that expectation in the way you communicate information in your workshop.
- To minimize the chances of anyone in the room missing a vital piece of information, make sure to **say important things three times.**

---

## Giving clear INSTRUCTIONS

### 1. One way to do an exercise

### 2. Show examples

### 3. Use insight statements

- You might think that giving people multiple options to do an exercise would give people more freedom, but in most cases, more options only add confusion.
- People in your workshop have a lot of mentally draining activities to do and aren't as familiar with the tasks as you are.
- Therefore, you should only **show one way of doing** an exercise.
- If, and only if, people ask you for other options, that's when you can provide an alternative.

---

## Giving clear INSTRUCTIONS

### 1. One way to do an exercise

### 2. Show examples

### 3. Use insight statements

- Examples help us **understand concepts** better since they take ideas from an abstract description and make them concrete by giving them context.
- Some presenters fear that showing examples will limit and influence people's thinking and decide to leave them out in the name of creative freedom. In practice, the tradeoff is worth it.
- Creative freedom can come later. But when you're teaching people an exercise for the first time, it helps to have a **template to follow**, just like training wheels for riding a bicycle.

---

## Giving clear INSTRUCTIONS

1. One way to do an exercise

2. Show examples

3. Use insight statements

- During a workshop, you're going to be talking a lot, which means your participants will have to take in a lot, but there's only so much the mind can absorb before losing focus.
- So while it's good to give a detailed explanation of a concept or exercise, make sure to **summarize** with an insight statement.
- An **insight statement** tells people the "why". It gives context for the task.

➤ *"The big idea with this exercise is..."*

➤ *"The most important thing about this is..."*

➤ *"The way to do this exercise well is..."*

➤ *"The main problem we'll try to solve is..."*

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## The danger of **TROUBLEMAKERS**

As a facilitator, you need to be prepared to handle all kinds of situations that may arise during your workshops, and that includes **difficult individuals and troublemakers**.

Troublemakers can easily derail your workshop since they tend to:

- Talk a lot
- Distract others
- Don't listen to instructions
- Ask difficult questions
- Try to take over
- Try to catch you out



---

## Mitigating **TROUBLEMAKERS**

### 1. Set expectations

### 2. Record ideas (and move on)

### 3. Use a question Parking Lot

### 4. Use note & vote

### 5. Give tasks

- If you set the expectations correctly in the beginning of your workshop, it will be easier for you to handle these situations later.
- So make sure to **refer back to the expectations** that you've set at the beginning of the workshop.
- This will help to keep everyone on the same page and ensure that the workshop stays on track.

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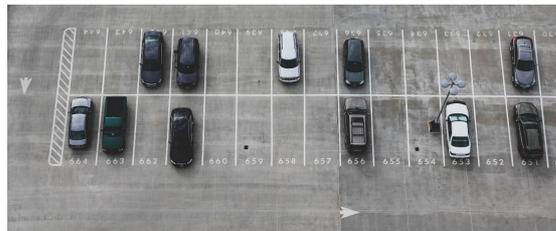
## Mitigating TROUBLEMAKERS

1. Set expectations
  2. Record ideas (and move on)
  3. Use a question Parking Lot
  4. Use note & vote
  5. Give tasks
- Occasionally participants will contribute **input which doesn't seem to fit**. This might be because they aren't used to your workshop methods, they don't know what might be coming next, or perhaps they have a hidden agenda you don't know about.
  - If you're doing an exercise that has layers of voting and decision-making, it's usually not going to cause a problem if you simply note down the input, even if you think it doesn't make sense.
  - You can even create an **Idea Parking Lot** or **just start writing**.
    - Helps people feel heard
    - ... and their input is valuable
    - They can let go and move on

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## Mitigating TROUBLEMAKERS

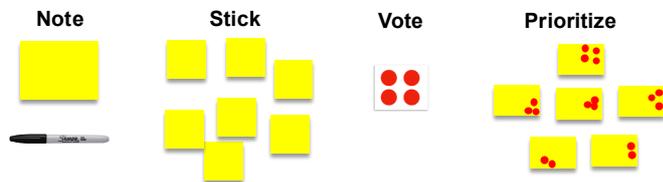
1. Set expectations
  2. Record ideas (and move on)
  3. Use a question Parking Lot
  4. Use note & vote
  5. Give tasks
- Sometimes it's hard for people to stop talking and move on when they feel that the topic is important and shouldn't be forgotten.
  - A Parking Lot is a space where questions and topics can be "parked" for discussion later.
  - Be sure to include a block of time in your agenda to **come back and answer** those questions!



---

## Mitigating TROUBLEMAKERS

1. Set expectations
  2. Record ideas (and move on)
  3. Use a question Parking Lot
  4. Use note & vote
  5. Give tasks
- Whenever you see a circular discussion and the topic is important to help you move to the next step, **gently stop the discussion** and tell people that now is a perfect time to do a note & vote!
  - With a note & vote, everyone gets to express their opinions, and have their say by voting on the ideas.
  - You will reach a much faster, actionable outcome with Note & Vote than you would with an open ramble.



---

## Mitigating TROUBLEMAKERS

1. Set expectations
  2. Record ideas (and move on)
  3. Use a question Parking Lot
  4. Use note & vote
  5. Give tasks
- If you've tried everything and nothing seems to be working, don't worry, there's still something you can do.
  - Give the Troublemakers tasks during the workshop, like drawing the map or taking notes of people's input.
  - You can even address them as a volunteer or a **co-facilitator**.

---

## Cutting out circular **DISCUSSIONS**

Circular discussion is a natural occurrence whether you're in a business meeting, personal conversation, or a workshop. It's how humans are used to communicating, and it can be a hard habit to break.

It's okay to allow some **room for discussion**, but as the facilitator, you need to take charge the moment you feel a discussion is going nowhere or is taking up too much time—and you shouldn't wait long before you cut in.



---

## Asking difficult **QUESTIONS**

It's a guarantee that there will be times when you are faced with difficult questions to which you don't know the answer. They can throw you off your game if you don't know how to handle them.

I recommend using a combination of the following 3 techniques for handling difficult questions:

1. **Set expectations (and refer back to them)**
2. **Use a Parking Lot**
3. **Ask probing questions**



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## PROBING questions

- “That’s a really interesting question! Can you tell me what’s behind you asking that?”
  - “Are you thinking of a specific situation?”
  - “What do you mean exactly? Can you tell me more?”
- Probing Questions are like a magic trick! They allow you to **engage in the question** without revealing that you might not know how to answer it.
  - Uncertainty in a facilitator can lead to the group losing trust and confidence in you as a leader.

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## Handling the TROUBLEMAKERS

Although the above techniques work well in most cases, you should still expect and prepare for troublemakers who simply won't cooperate.

This situation is definitely an exception and should be a rare occurrence. Don't use the Nuclear Option unless absolutely necessary.

1. **Approach the person privately** in a break and ask how they're doing.
2. **Approach again and tell them directly** they are being disruptive and impacting the workshop for others.
3. **Ask them to leave** (if 1 & 2 don't work)



# Keys to Success

1

**6 Laws of Facilitation**

2

**Setting Yourself Up for Success!**

3

**Giving Instructions**

4

**Danger of Troublemakers**

5

**Remote Workshops**

## BENEFITS of remote workshops

### 1. Distributed teams

### 2. Easier to organize

### 3. Much more accessible

### 4. Environmental impact

### 5. Same outcomes & quality

### 6. Lower stress

- Easier to organize, even with distributed teams.
- Take action NOW instead of waiting for the perfect time "when the stars align" and people can make time for the workshop.
- You can build a remote collab habit/culture and show that it's easier to collaborate than on location.

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## BENEFITS of remote workshops

1. Distributed teams
  2. Easier to organize
  3. Much more accessible
  4. Environmental impact
  5. Same outcomes & quality
  6. Lower stress
- No need to organize a workshop room - or having to deal with subpar rooms. You have the perfect set-up.
  - No need to buy materials - and you never run out.
  - Fully digitized, so you are not having to type everything up.

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## BENEFITS of remote workshops

1. Distributed teams
  2. Easier to organize
  3. Much more accessible
  4. Environmental impact
  5. Same outcomes & quality
  6. Lower stress
- You can sprint worldwide! Easier to commit for some people.
  - Easier to get buy-in from busy people who might otherwise not be able to join.
  - Easily scalable to larger groups.

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## BENEFITS of remote workshops

1. Distributed teams
  2. Easier to organize
  3. Much more accessible
  4. Environmental impact
  5. Same outcomes & quality
  6. Lower stress
- No travel costs, no jetlag, no environmental impact.

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## BENEFITS of remote workshops

1. Distributed teams
  2. Easier to organize
  3. Much more accessible
  4. Environmental impact
  5. Same outcomes & quality
  6. Lower stress
- SAME outcomes / quality as in an in-person sprint... if not better!
  - It's not a lesser or inferior option.

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## BENEFITS of remote workshops

1. Distributed teams
  2. Easier to organize
  3. Much more accessible
  4. Environmental impact
  5. Same outcomes & quality
  6. Lower stress
- Lower stress with fewer variables, more focus on the participants.

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## CHALLENGES of remote workshops

1. It's going to feel...weird
  2. Building rapport
  3. Isolation
  4. The tech set-up
- The experience is impacted, it's harder to make people feel special because you can't host them in a nice space and make coffee for them, etc.
  - We don't get to host clients before & after the workshop and during breaks.
  - The energy that you would have with in-persons interactions don't carry over exactly to a remote workshop happening over a video call.
  - So you need to bring a lot more energy than you would normally do in an in-person workshop.

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## CHALLENGES of remote workshops

1. It's going to feel...weird
  2. Building rapport
  3. Isolation
  4. The tech set-up
- It's harder to have casual chats in breaks to build rapport and keep the energy up.
  - Some of the clues you normally see in body language are not there. Set expectations beforehand and try to have the participant's camera on at least.

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## CHALLENGES of remote workshops

1. It's going to feel...weird
  2. Building rapport
  3. Isolation
  4. The tech set-up
- When working on the Miro-board, participants might feel isolated since they can't see the rest of the room (could be good or bad). I recommend they see the facilitator the whole time.

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## CHALLENGES of remote workshops

1. It's going to feel...weird
  2. Building rapport
  3. Isolation
  4. The tech set-up
- Tech will go wrong and that can disrupt the flow of the workshop.
  - You can't control the participant's environment: connection, noise, slow laptop, small screen, bad mic, bad cam. So have a tech test call with your participants.
  - Participants can get easily distracted with other apps on their computers.
  - Participants can't completely disconnect from their day-to-day work and immerse themselves in the workshop like they can when they're completely away from their office and devices.

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## 7 principles

1. Energy
  2. Communication
  3. Helping people feel included
  4. Be a good guide
  5. Preparing for tech failures
  6. Don't overcomplicate things
  7. Having a Technical Facilitator
- A workshop is not a meeting! So it should feel different than a normal conference call. It should feel energetic!
  - Avoid setting up a fake persona. Get genuinely excited about your client challenge.
  - Start your workshop with a starting exercise, an ice-breaker. Especially if participants jumped in from another meeting.
  - Have some workshop music.

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## 7 principles

1. Energy
  2. Communication
  3. Helping people feel included
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  6. Don't overcomplicate things
  7. Having a Technical Facilitator
- Communicate the appropriate times and the necessary information.
  - Avoid that it feels like a long call!
  - Break-up the information on what the workshop will feel like, breaks, ...
  - Keep everyone involved so that they feel like being part of a total project.
  - Allow a bit more time during discussions. But if needed, cut in so that the discussion doesn't keep going.

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## 7 principles

1. Energy
  2. Communication
  3. Helping people feel included
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  7. Having a Technical Facilitator
- Make people feel like they are part of a team!
  - Establish some rules and guidelines so that everybody is heard and included.
  - Ask everybody to raise their hand if they want to speak.
  - Keep your eye on people who are more quiet, gently ask for their input, and add their voice.

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## 7 principles

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  7. Having a Technical Facilitator
- Share the information at the right time.
  - Make use of progressive disclosure. Only reveal the current exercise and cover up all other exercises so people will snoop around.
  - Ask everybody to follow your cursor on the board.
  - Minimize the need to switch between the video Zoom and the whiteboard Miro board. Ideally, you have a 1/3 Zoom and 2/3 Miro set-up.

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## 7 principles

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  3. Helping people feel included
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  7. Having a Technical Facilitator
- Have fallback options and back-up plan.
  - Map out scenarios so you know exactly what to do and you don't stress out on the spot.
  - Set-up alternatives, have solutions ready and even simulate to really know what to do.
  - Have a technical facilitator present to assist.

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## 7 principles

1. Energy
  2. Communication
  3. Helping people feel included
  4. Be a good guide
  5. Preparing for tech failures
  6. Don't overcomplicate things
  7. Having a Technical Facilitator
- Keep it simple!
  - Try to move horizontally in Miro instead of having to need to scroll up and down.
  - Tell your participants that they only need just a few buttons and set them at ease so that they don't feel stressed to learn the entire tool.

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## 7 principles

1. Energy
  2. Communication
  3. Helping people feel included
  4. Be a good guide
  5. Preparing for tech failures
  6. Don't overcomplicate things
  7. Having a Technical Facilitator
- Somebody who can take care of backup tasks.
  - A technical facilitator really increases the quality of your workshops.

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## Engage and create nice **EXPERIENCE**

One of the key differences between an in-person workshop and a remote workshop is that you're not in the same room with people.

1. Keeping the **energy up!**
2. Dealing with **group dynamics** and conflicts
3. Only use **½ day workshops**
4. Communicate **proactively** and guide people



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## The ideal **HARDWARE** set-up

- Good internet connection
- Good audio
- Laptop / desktop
- Microphone (built-in is a no go!)
- Headphones / earbuds (using speakers is a no go!)
- Webcam
- Lighting and ambient lighting
- Monitors
- Desk
- Chair

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## The ideal SOFTWARE set-up

- ❑ Collaboration tools like email, Google Drive, Slack, Basecamp, ...
- ❑ Calendar booking (Calendly)
- ❑ Survey Tool (Typeform/Google Forms)
- ❑ Video conference software (Zoom)
- ❑ Digital whiteboard (Miro)
- ❑ Music (Spotify)
- ❑ Chat (Slack, Whatsapp, Basecamp)
- ❑ Screen recording tool (Loom)



# Questions?

<https://daigpartners.com>

#### USA Office

223 South West Street, Suite 900,  
Raleigh, North Carolina 27603, USA

+1 984-248-6426

#### Europe Office

Spoonwegstraat 23,  
Waasmunster 9250, Belgium

+32 468-258-947