June <u>06<sup>th</sup></u>, 2023

# Building Data Literacy in your Organization

David Gaffaney, Sr Principal, IPS



# Housekeeping Tips









- Today's Webinar is scheduled for 1 hour
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the Q&A option and we will respond at the end of the presentation
- The webinar is being recorded and will be available on our INFASupport YouTube channel and Success Portal where you can download the slide deck for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the post-webinar survey and provide your feedback and suggestions for upcoming topics.



# Feature Rich Success Portal



Bootstrap trial and POC Customers



Enriched Customer Onboarding experience



Product Learning Paths and Weekly Expert Sessions



Informatica Concierge

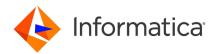


Tailored training and content recommendations



## More Information





# Safe Harbor

The information being provided today is for informational purposes only. The development, release, and timing of any Informatica product or functionality described today remain at the sole discretion of Informatica and should not be relied upon in making a purchasing decision.

Statements made today are based on currently available information, which is subject to change. Such statements should not be relied upon as a representation, warranty or commitment to deliver specific products or functionality in the future.





Building a Data Literacy Program

Tech Tuesday Series June 6<sup>th</sup> 2023

#### **David Gaffaney**

Senior Principal
Data Governance and Privacy Domain Expert

# Today's Agenda



Data Literacy 101

5 Delivery Methods

The Data Governance Community

6 Sample Training Tracks

The Curriculum

7 Building the Execution Plan

4 Training Path and Skill Guides



**David Gaffaney**Sr Principal Consultant
Data Governance Journey



# Data Literacy 101



Strong Data Literacy will drive adoption, Weak Literacy will block it.



### What is data literacy?

Data literacy is the ability to read, write, analyze, communicate, and reason with data. It's a skill that allows individuals and organizations to make better, data-driven decisions.

DataCamp: State of Data Literacy 2023

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**Important** Because...

DG **Programs** Fail When...

We want

you to succeed! It is the **enabler**, it brings business concepts to the enterprise, not just definitions, but origins, transformation, and delivery. The entire lifecycle.

There is **Inefficient** or **Corrupted** data handling without clear traceability; think chain of custody

There is **Inadequate Understanding** of data by consumers (and especially creators) that leads to misinterpretations

These misinterpretations lead to poor decision making and ineffective downstream data... which breaks **Data Trust**.

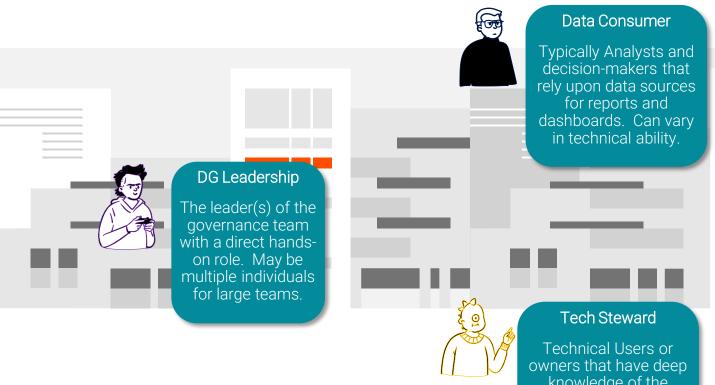
We have assembled a curriculum and approach for building and executing a Data Literacy Program.

Yes, we are Informatica! It references our platform, but we are just one part of your DG Enterprise strategy

# Who makes up your Governance Community?

### **Common Roles and Responsibilities**

The roles shown here all have either a creator or consumer role within the governance program. Each has different skills they need to bring to the table.



Technical Users or owners that have deep knowledge of the business data from a storage, access, and processing perspective

#### **Business Steward**

Experts in a particular business domain, very hands-on with the governance product set; Go-between with other business SMEs.

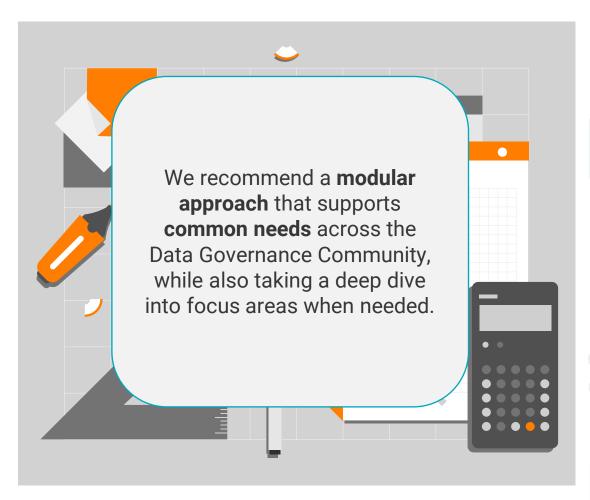
#### Administrator

Day to day
Administrators for the
Governance Platform
as well as other key
systems and data
sources.



# What should my Curriculum Be?







#### **Data Governance Basics**

An overview of core Data Governance concepts that the Community will need to understand, including the Platforms, Common Activities, Benefits, and Governance withing the context of your organization.



#### **Data Consumer**

Training on the Skills a Consumer will need to find data, request it from data owners, and bring it into their own environment to use it for their business use cases. Explore Collaboration and Social options.



#### **Data Stewardship**

Data Stewards are the most active as Creators, their curriculum should include navigation of the platform, and the full lifecycle of reviewing technical data and lineage, assigning business context and staging for publication.



#### **Technical Stewardship**

The Technical Steward is involved in the scanning and profiling of **technical data** to bringing it into the Governance platform. This curriculum is more technically focused but also covers data set publishing.



#### Administration

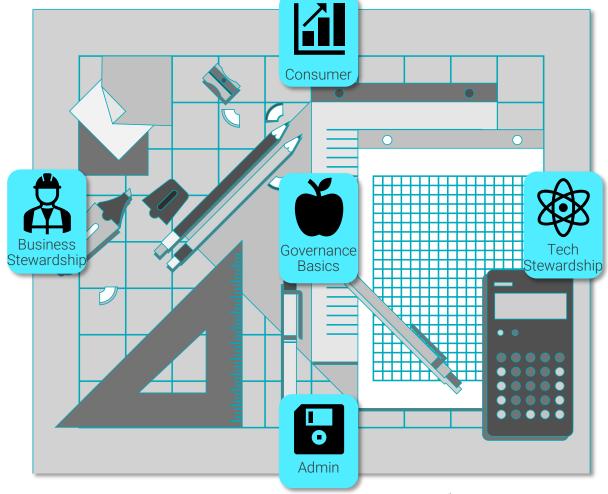
This curriculum is a combination of Informatica Platform tasks, but also ACME's core systems and security. Core topics include User Administration, Data Source configuration, performance tuning, security, and general platform administration.



# Setting the Training Path









# Raw Materials: Target Skill Guide and Methods



	ole	Data	Data Collection	Data Arch /	Technical alog	Marketplace
Skill Data Governance	DGO Lea	ad Consumer Data	Owner Owner	Core Technologies	Typical Training Plan Industry education, e.g. Gartner, Customer Data Literacy Literacy Consumer	Admin
Apı Kno Busine	Skill  Data Governance  Knc	Description  eral Knowledge and concepts of data governance its role within Customer  owledge and insight into the key Customer stems that support the governance use cases	Levels  1: Indicates general awareness 4: A leader that develops and educates on the program  1: Indicates general awareness 4: Application Architect or DBA with deep knowledge of the specific or database	Non-specific  Customer Operational Systems (e.g. SAP, CDS Retailer data sets, etc.)  Customer Operational Systems Informatica Data Governance	Informatica Data Steward track  Customer Internal training. Informatica Technical Steward track  Customer Internal Training Informatica Data Steward track	2
Glossa Dicti Regulatio	Knowledge  Business Domain	nowledge and understanding of the business oncepts in key domains such as Sales, fanufacturing, Logistics, etc.	1: Indicates general awareness 4: Domain expert with insight into definitions, policies and processe in the domain  1: Indicates general awareness 4: Business Term SME in a particular area of specialty; Data Dictimanagement	Customer Business facing systems and Dashboards Informatica Data Governance Customer Points Governance Customer Points Governance	Customer Regulatory Knowledge Informatica Data Steward Track  Tracking Training	2
	Glossary / Data	within Customers such as business process and such as business process and such as business process and such as the such as a such as such	t, 1: Indicates general awareness 4: System Administrator on multiple security technology 4: System Administrator on multiple security technology	Customer databases and applications Informatica management Security Applications Consulted on Informatics Configuration	Customer Security Training Informatica Administration  Customer Analytics  Customer Technical and System	3
Security/I so	Admin / DBA			Analytics and Process applications Consulted on Information		2
Proces	Analytics / Process	business	1: Indicates general awareness	certifications Training Systems, Worknowledge of application training conduct		
Training / Skills	Training / Sof	Ability to develop and execute training and enablement tasks for key roles in the Customer enterprise. Includes Change Management				-
					Required Skills: 4	321



# Delivery Methods

#### **Job Aid**

A Job Aid is a **step-bystep guide** to common tasks, typically Self Guided. They are in sequential order, usually with clicks and text-entry instructions with **screen shots** from the ACME environment. Media may be a PDF type document or HTML popup presented with the application.

#### Video

A Video is typically a **narrated screen** capture demonstrating common tasks.

The best videos are under 5 minutes and introduce a task, show the task, then view results and alternate paths.



#### Manual

A Manual is a **standalone document**. typically in a read-only PDF. It is intended to be accessed by topic through a Table of Contents or Index (vs. read end to end). May be ACME authored or be sourced from Informatica or other vendor.



#### **Informatica University**

These are **structured classes** offered by **Informatica**, either instructor led or self-guided. Usually presented in a group format over sequential days.

This may be the initial exposure for key Stewards and Admins, then reinforced with Job Aids, Videos and Manuals.

Our **Success Portal** is also another great resource.



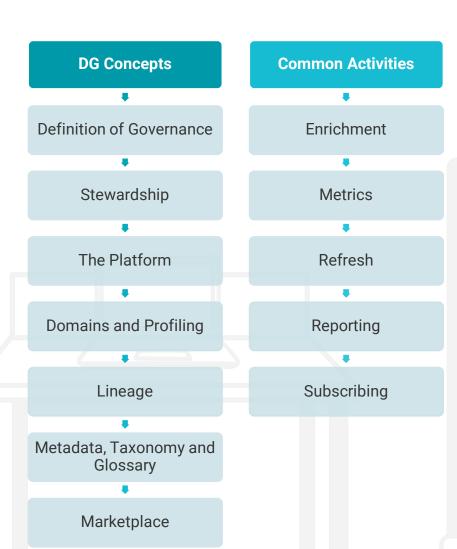
### Track: Data Governance Basics

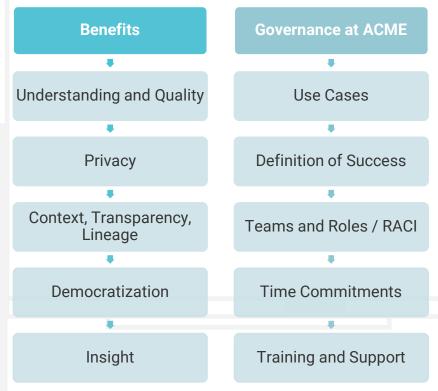






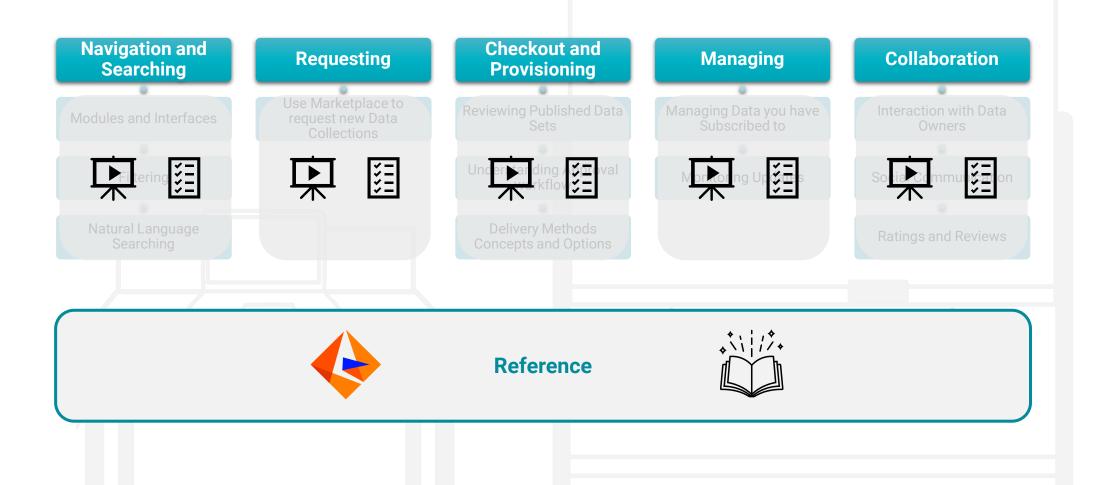








# Training Track: Data Consumer





15

# Track: Data Steward / Data Owner





Policy Hierarchies

#### Onboarding

System and Resource Scanning

Al Tuning

and Parameters

Learning and Refinement

#### Curation

Automated Business Term assignment

Manual Business Term Assignment

Vanda ion and Sur Poordination

#### Documenting Data Sets

Al Models vs. Data Sets

Stakeholder Assignment

Folicy Assignment

#### Lineage

Manual Lineage
Development

#### Maps and Impact

Map view concepts and best practices

Impact Assessment strategies

#### **Publishing Data Sets**

Overview of the Data
Steward Role in the process

Data Collections Concepts

Delivery Methods Concepts
and Assignment







# Track: Technical Steward



#### **Identifying Systems**

System Identification

ocation Ground, Fog. Cloud



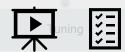
Profile Requirements

Mechanics of Resource
Definition

#### Scanning

Scanner Configuration

ative vs. Custom Scanners



Troubleshooting

Security and Encryption considerations

#### Curation

Automated Business Term assignment

Manual Business Term Assignment



#### **Metadata Onboarding**

Training the Onboarding process

Turning for Performance



#### **Establishing Lineage**

**ETL System Identification** 

IICS / CAI vs. other method



Tuning and Testing Lineage Scans

Manual vs. Automated Methods

#### **Publishing Data Sets**

Overview of the Technical Steward's Role in the process

Data and Technical Owner
Assignment





Provisioning considerations by Delivery method

Lifecycle Management







### Track: Administration



#### **User Administration**

Grouped Pole Magnent
ACME Identity Management
as well as Data Governance

### Data Source Configuration



#### Dashboarding

Central Data Quality

Dashboard

Analytics and Adoption
Dashboards

### Tuning and Log Management

Performance Management

Security and Breach monitoring

Vendor Communication and

#### Refresh

User synchronization and

### Marketplace Administration

Configuration of Delivery Methods for Provisioning

Access Management gratio

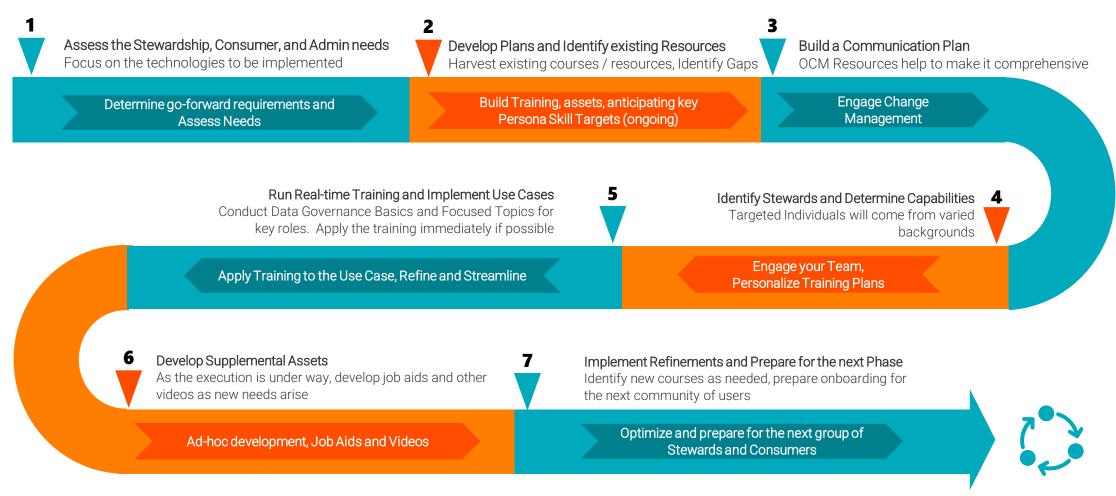






# Data Literacy Execution Plan







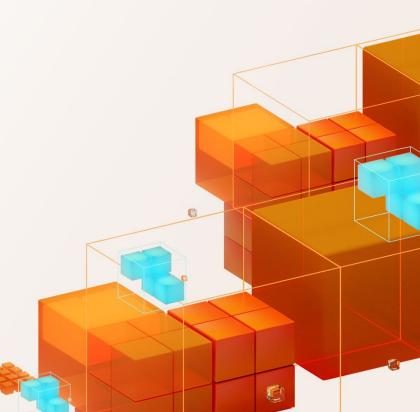
# Informatica



### **PANEL**

Mary Wilson Senior Principal Advisory Consultant

Tara Smith Education Services, Informatica University



# Informatica

Reference Below



# Training Track: Data Consumer



# Navigation and Searching

Modules and Interfaces

Filtering







#### Requesting

Use Marketplace to request new Data Collections





### Checkout and Provisioning

Reviewing Published Data Sets

Understanding Approval workflow

Delivery Methods Concepts and Options





#### Managing

Managing Data you have Subscribed to

**Monitoring Updates** 





Ratings and Reviews

Collaboration

Interaction with Data

Owners

Social Communication











# Track: Data Steward / Data Owner



#### **Data Governance Documenting Data Onboarding** Curation Lineage **Maps and Impact** Sets **Facets** System and Resource Automated Business Term **Business Glossary Concepts** Map view concepts and best Al Models vs. Data Sets Automatic Lineage Review / Best Practices Scanning assignment practices Manual Lineage Manual Business Term Impact Assessment Stakeholder Assignment Policy Hierarchies Al Tuning Assignment Development strategies **Modeling Business** Validation and SME Regulatory Review **Domains and Patterns Bulk Load Concepts Focused Overlays** Processes coordination Usage of Bulk Uploads Learning and Refinement Policy Assignment **Process Assignment**







**Publishing Data Sets** 

Overview of the Data Steward Role in the process

**Data Collections Concepts** 

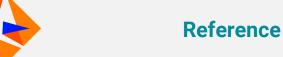
Data and Technical Owner Assignment

**Delivery Methods Concepts** and Assignment

Lifecycle Management











# Track: Technical Steward



#### **Identifying Systems**

#### **Scanning**

#### Curation

#### **Metadata Onboarding**

#### **Establishing Lineage**

#### **Publishing Data Sets**

System Identification

**Scanner Configuration** 

**Automated Business Term** assignment

Training the Onboarding process

ETL System Identification

Overview of the Technical Steward's Role in the process

Location Ground, Fog, Cloud

Native vs. Custom Scanners

Manual Business Term Assignment

Turning for Performance

IICS / CAI vs. other methods

Data and Technical Owner Assignment

Access Requirements

Tuning

Validation and SME coordination

New Scans vs. Refresh

Access and Security Requirements

**Delivery Methods Concepts** and Development

**Profile Requirements** 

Troubleshooting

Tuning and Testing Lineage Scans

Provisioning considerations by Delivery method

Mechanics of Resource Definition



Security and Encryption considerations







Manual vs. Automated Methods















# Track: Administration



#### **User Administration**

Onboarding and Offboarding

Group and Role Management

ACME Identity Management as well as Data Governance





### Data Source Configuration

**Scanner Configuration** 

Access Management

Profiling





#### **Dashboarding**

Central Governance Dashboards

Central Data Quality Dashboards

Analytics and Adoption Dashboards

Team Sharing and alignment





### Tuning and Log Management

Scan Optimization and Performance Management

Incident Management

Security and Breach monitoring

Vendor Communication and Case Management





#### Refresh

Technical Data Refresh

User synchronization and orphaned accounts





### Marketplace Administration

Configuration of Delivery Methods for Provisioning

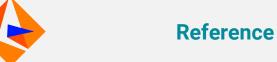
Access Management integration

Category Management

Batch Load Optimization











# Data Literacy Skill Guide



	Skill	Description	Levels	Core Technologies	Typical Training Plan
Informatica Platform Impact	Data Governance	General Knowledge and concepts of data governance and its role within Customer	I: Indicates general awareness     4: A leader that develops and educates on the program	Non-specific	Industry education, e.g. Gartner, Customer Data Literacy Informatica Data Consumer Track
	Application Knowledge	Knowledge and insight into the key Customer systems that support the governance use cases	I: Indicates general awareness     A: Application Architect or DBA with deep knowledge of the specific application or database	Customer Operational Systems (e.g. SAP, CDS Retailer data sets, etc.)	Customer Internal training.  Informatica Technical Steward  track
	Business Domain	Knowledge and understanding of the business concepts in key domains such as Sales, Manufacturing, Logistics, etc.	I: Indicates general awareness     Domain expert with insight into definitions, policies and processes involved in the domain	Customer Operational Systems Informatica Data Governance	Customer Internal Training Informatica Data Steward track
	Glossary / Data Dictionary	Knowledge of specific business terms and taxonomy within Customer, including relationships to other concepts such as business process and regulations.	I: Indicates general awareness     Business Term SME in a particular area of specialty; Data Dictionary management	Customer Business facing systems and Dashboards Informatica Data Governance	Customer Domain Knowledge Informatica Data Steward Track
	Regulation / Policy	Knowledge of data management policy and regulations that apply to specific business domains	1: Indicates general awareness 4: Compliance and / or regulatory knowledge for a particular focus area (e.g. FDA, CCPA, DOT, GAAP)	Customer Policy database Informatica Data Governance for( Processes)	Customer Regulatory Knowledg Informatica <b>Data Steward</b> Track
	Admin / DBA	System administrator or data base administrator for specific systems. Informatica Administrators likely independent of other Customer System Admins	1: Indicates general awareness 4: Architect / Database Admin	Customer databases and applications Informatica management	Customer Technical Training Informatica Administration
	Security	Security administrator on systems such as SailPoint, LDAP, Active Directory, etc.	I: Indicates general awareness     System Administrator on multiple security technologies	Security Applications Consulted on Informatica Configuration	Customer Security Training Informatica Administration
	Analytics / Process	Understanding and Knowledge of analytics systems and process management as impacted by core business use cases.	1: Indicates general awareness 4: Business Process Expert	Analytics and Process applications  Consulted on Informatica  Configuration	Customer Analytics
	Training / Soft Skills	Ability to develop and execute training and enablement tasks for key roles in the Customer enterprise. Includes Change Management	1: Indicates general awareness     4: Skilled in presentation development and delivery, training certifications	Training Systems, Working knowledge of applications for training conduct	Customer Technical and System Training Change Management Applications as needed

Blue Text indicates Informatica Platform Impact

