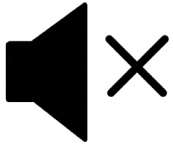


Oct 24, 2023

Organization Culture Transformation: Managing Change to Drive Adoption

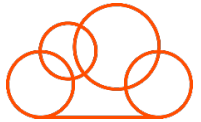
- Mary Wilson, Sr Principal Advisory Services Consultant, IPS

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 [Success Portal](#) - where you can also 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.

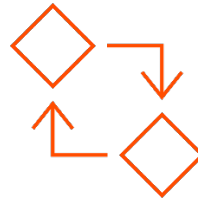
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions

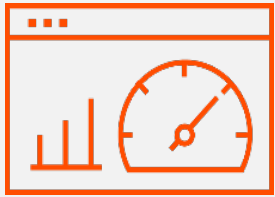


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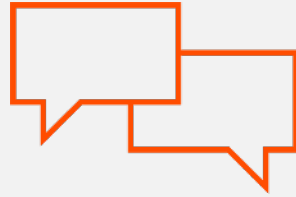
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



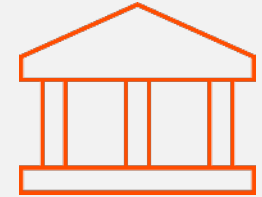
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Agenda

1

Culture Transformation Overview &
Why it is Important

2

Introduction to Culture Transformation Core
Components

3

Culture Assessment Tools & Techniques

4

Introduction to Data Literacy, Communication
Planning, Training Considerations

5

Influencing Change Through Use Case
Implementation

6

Q&A

What is Culture Transformation?

Culture transformation requires influencing the hearts, minds and skills of the organization to support the desired culture.

In the context of today's discussion, the desired outcome is a “data driven culture, driving adoption and achieving business value”.

What does it mean to be a “data-driven” organization?



PLACE DATA AT THE FRONT AND CENTER OF
THE CURRENT AND FUTURE WORK

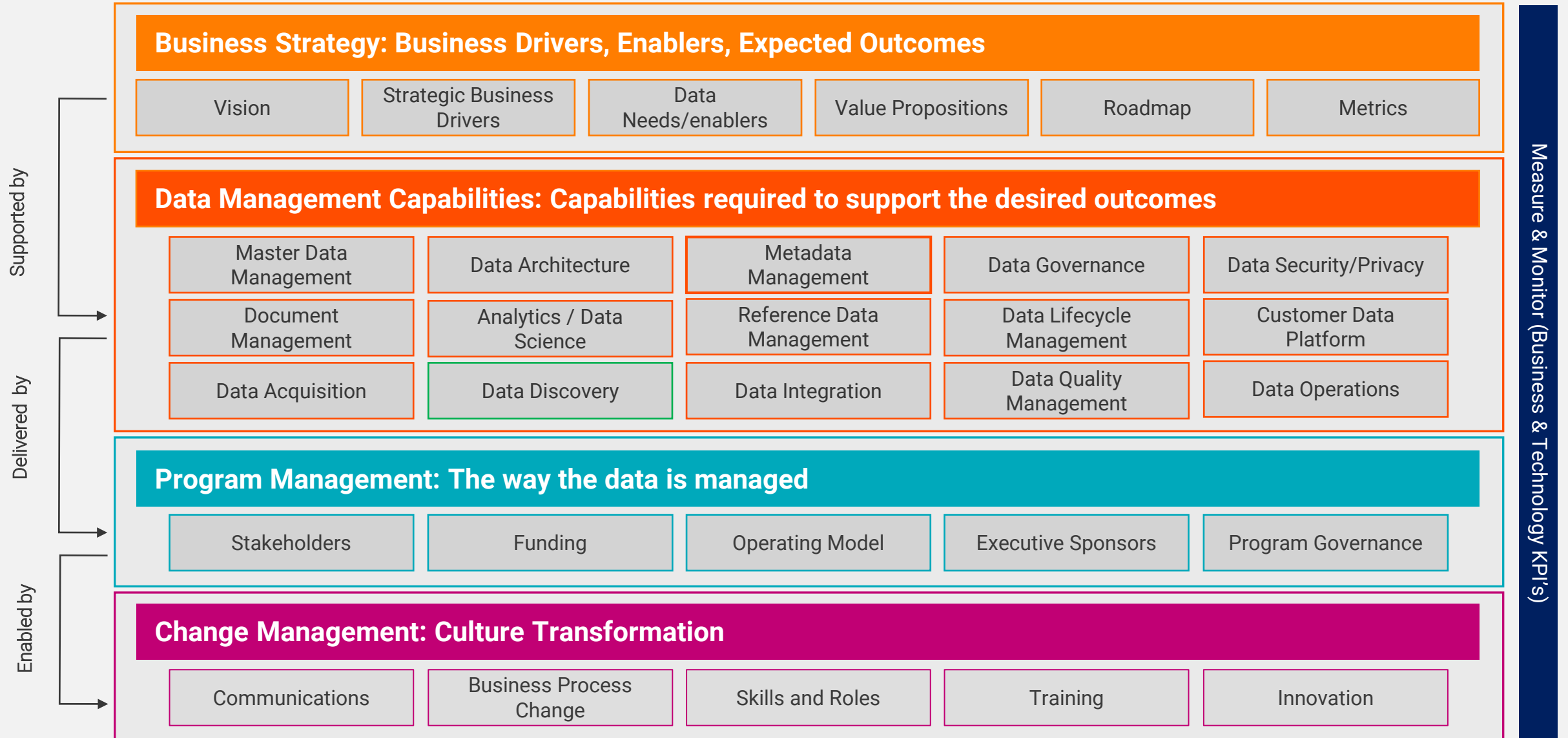
UTILIZE DATA EFFECTIVELY AND GENERATE
INSIGHTS

DRIVE CHANGE, INNOVATE NEW PRODUCTS AND
SERVICES, REDUCE RISK & INCREASE REVENUE

Culture trumps strategy, every time

- Organizational culture must learn to value data and data management activities
- Even with the best data strategy, data governance and data management plans, or the most effectively designed data centric solution will not, alone, produce successful change
- Leading successful change requires the facilitation of change at the individual level

Informatica Data Strategy Framework



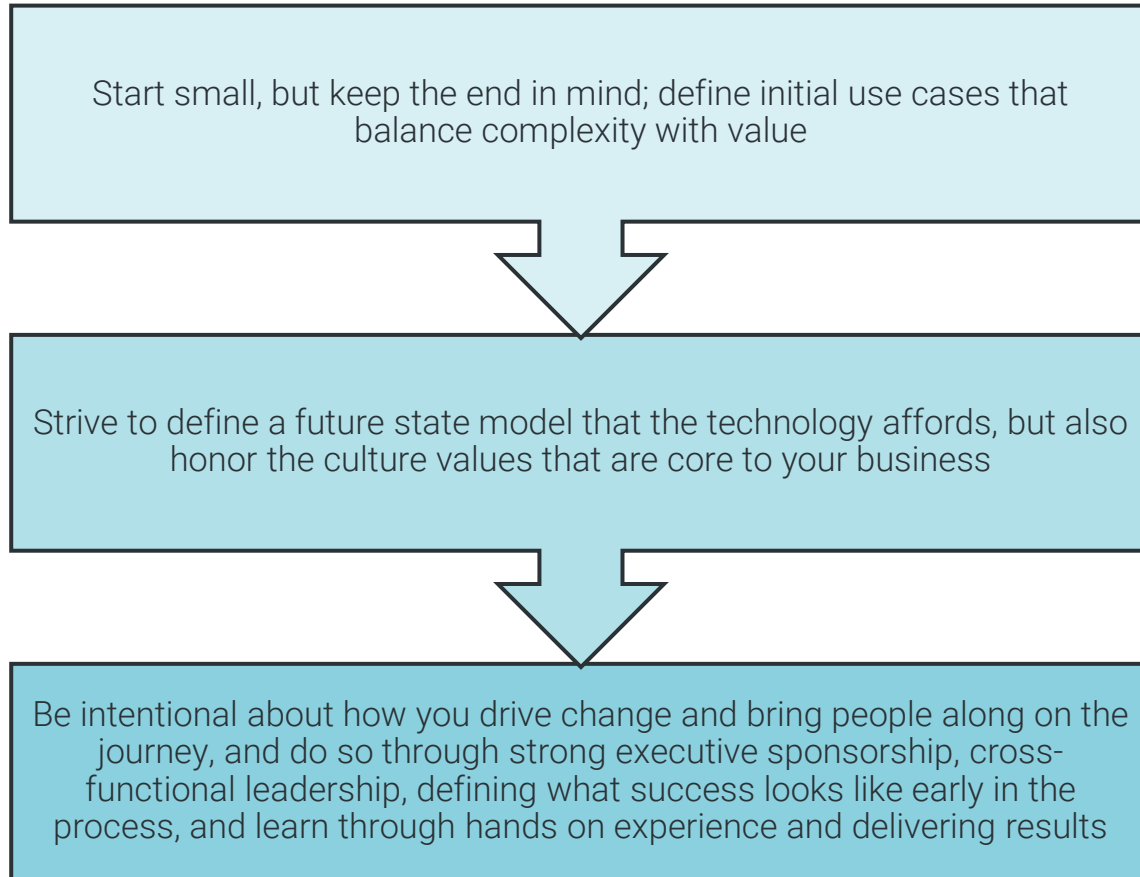
"Tell me, I forget.
Show me, I remember.
Involve me, I understand."

~ Chinese Proverb



Getting Started

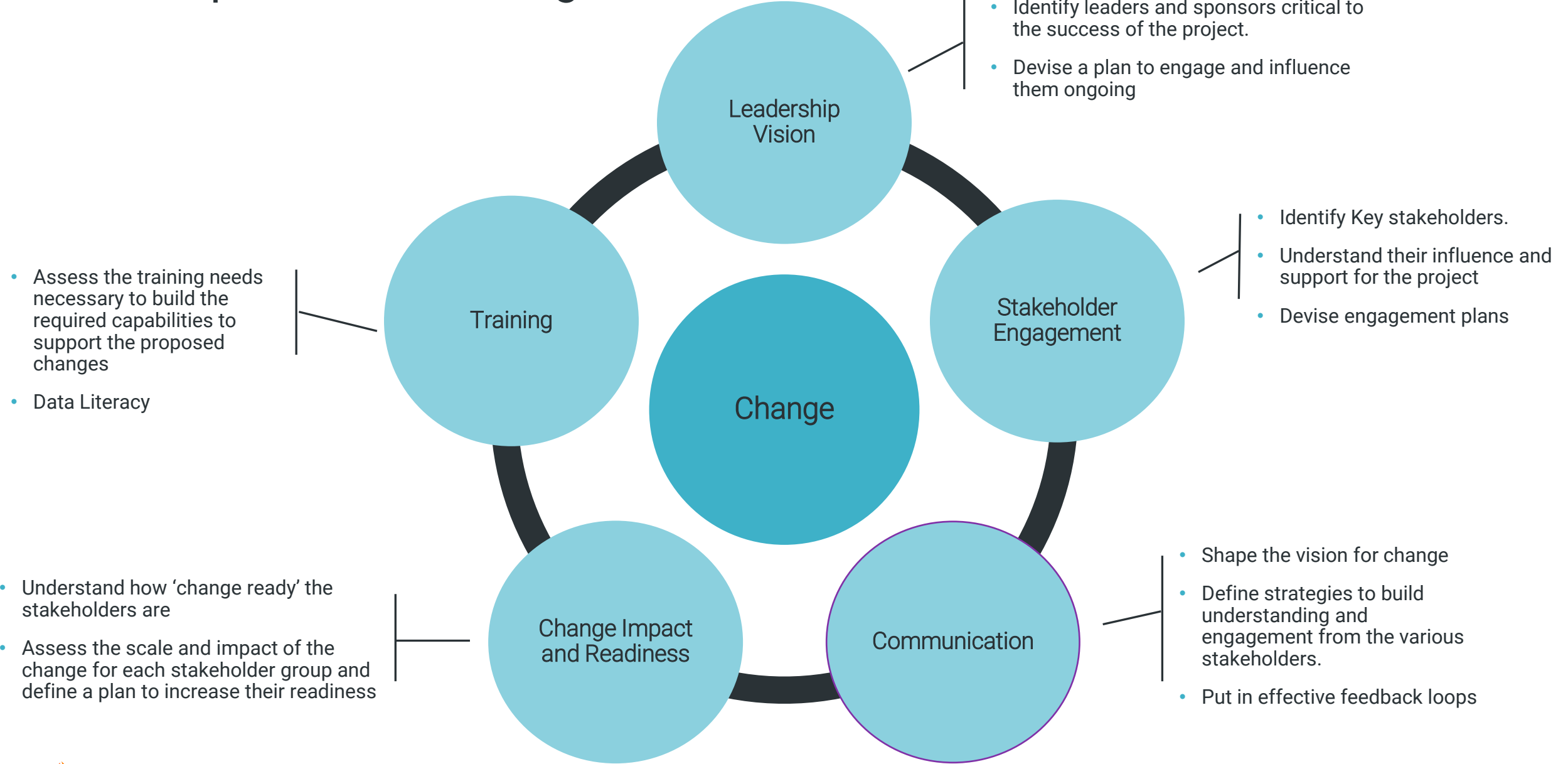
Three Basic Tenets



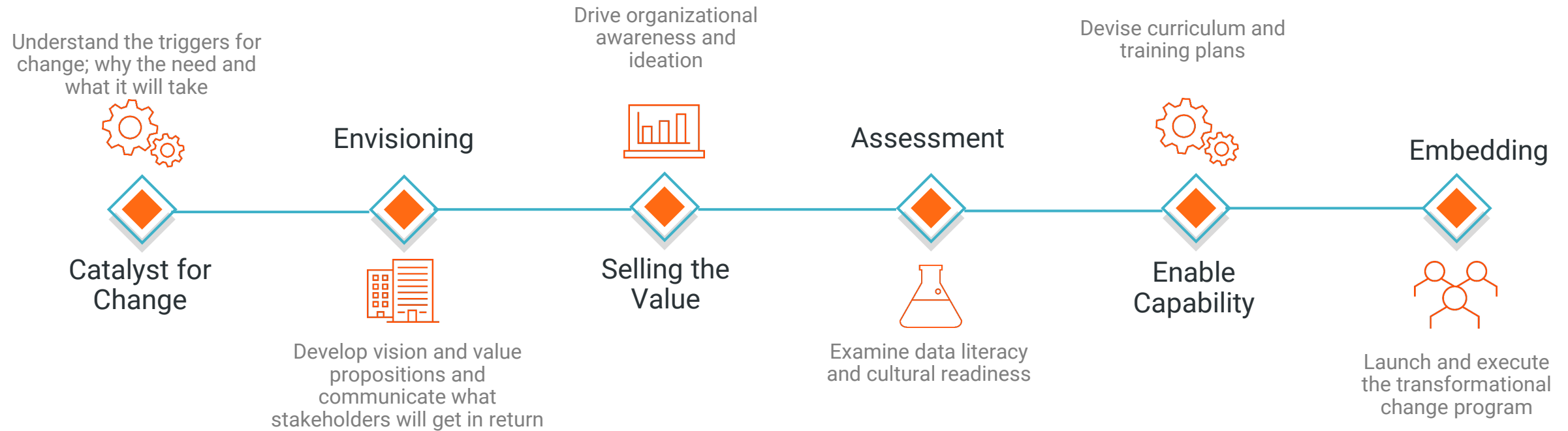
“Technology is only part of the story. For an organization to be insights driven, the culture has to change. Culture change means changing behaviors and focusing on people and processes. Technology facilitates that change.”

~ Jennifer Belissent, Principal Data Strategist Snowflake

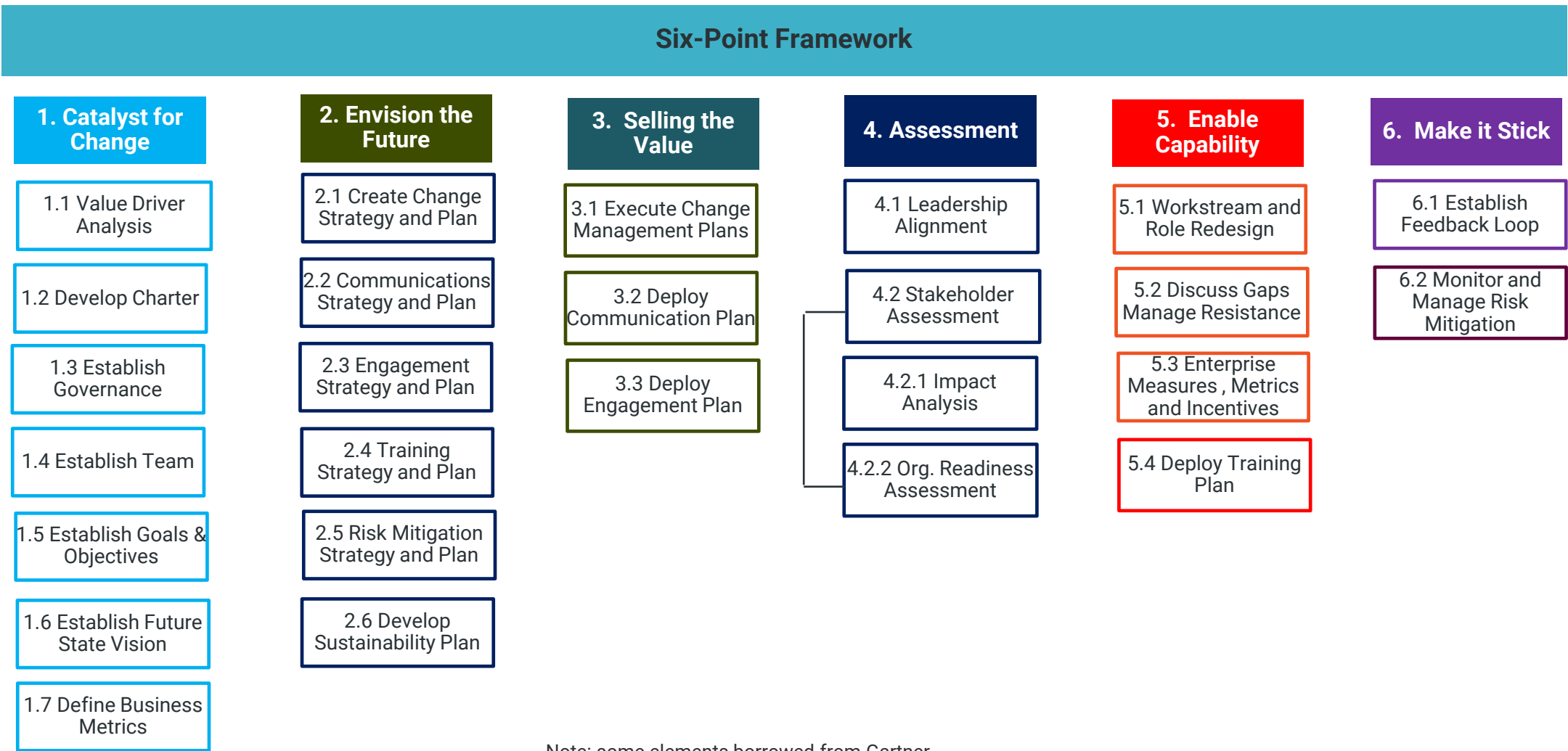
Core Components of Change



Roadmap for Organization Culture Transformation



Organization Culture Transformation



Note: some elements borrowed from Gartner

Cultural Transformation Maturity Model



Uncharted

Organization Culture –

- Data is an important focus of the organization; however, activities haven't been initiated

Data Literacy –

- Decisions are largely based on intuition and 'gut feeling'



Discovered

Organization Culture –

- Assessment and/or implementation of capabilities aligned to organizational shift has been initiated

Data Literacy –

- Data is being used to validate decision making
- SMEs translate data into insights manually



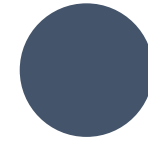
Established

Organization Culture –

- Data is considered an integral asset within the organization
- Culture transformation roadmap is developed

Data Literacy –

- Data is being used to drive decision making



Embedded

Organization Culture –

- Capabilities that enable data driven decision-making, and support a data culture have been implemented

Data Literacy –

- All data stakeholders consistently consult data to make decisions
- Data analytics team is fully operational
- Consumption is high



Culture Maturity Assessment

Building Blocks	Level 1 – Uncharted	Level 2 – Discovered	Level 3 – Established	Level 4 – Embedded
Leadership & Vision	Cultural change is seen as a reactive solution when all else fails	Benefits acknowledged by many but perceived as a necessity rather than a priority	Change is starting to become a priority and results driven	Change is seen as a priority for success; vision shared by top organization leaders
Stakeholder Engagement	Key stakeholders have not been identified; status quo	Key stakeholders have been identified, not actively engaged ; neutral	Key stakeholders identified and are supportive	Key stakeholders identified and are leading the change within the organization
Communication	Limited communication from all levels of the organization	Support and communication from some senior leaders and management	Support shown from senior leaders and management, regular communications about the value and success stories	Full support and regular communications from all levels of the organization
Change Impact Readiness	The organization is aware they have a problem, but have not yet made a commitment to take action in the near future	The organization have made a commitment to take action in the short-term and are already making small changes	The organization has made notable efforts to change; key stakeholders identified and actively engaged	The organization is actively working to change the culture, have made progress; working to stabilize the change
Data Literacy	Decision making is largely based on intuition and gut feeling	Data is used to validate after decision making. SME's translate data into insights manually	Champions and continuous improvement in place. May use data to make decisions	All data citizens consistently consult data to make decisions at the point of action
Training	"We've always done it this way" mindset; information-focused offerings	Efforts made to assess learner needs albeit inconsistently Some performance focused offerings High-level evaluation	Clear understanding of learner needs and learning theory; inconsistently practiced. Higher degree of evaluation	Clear understanding of learner needs, learning theory consistently put into action Effective alignment with needs and strategy; evaluation focused on assessing change
Metrics	Baselining awareness of change is just getting started <ul style="list-style-type: none"> % of overall associates awareness of change 	Associates are willing and committed to change <ul style="list-style-type: none"> % of change employees with skill gaps, % identified for training 	The organization is capable of the change <ul style="list-style-type: none"> % of LOB's, implementing the change % of capability gaps addressed 	The organization is ready to implement changes <ul style="list-style-type: none"> Pulse survey results + other feedback

Current State

2023 Goal

Long-term Goal

ential.



EDO PULSE SURVEY

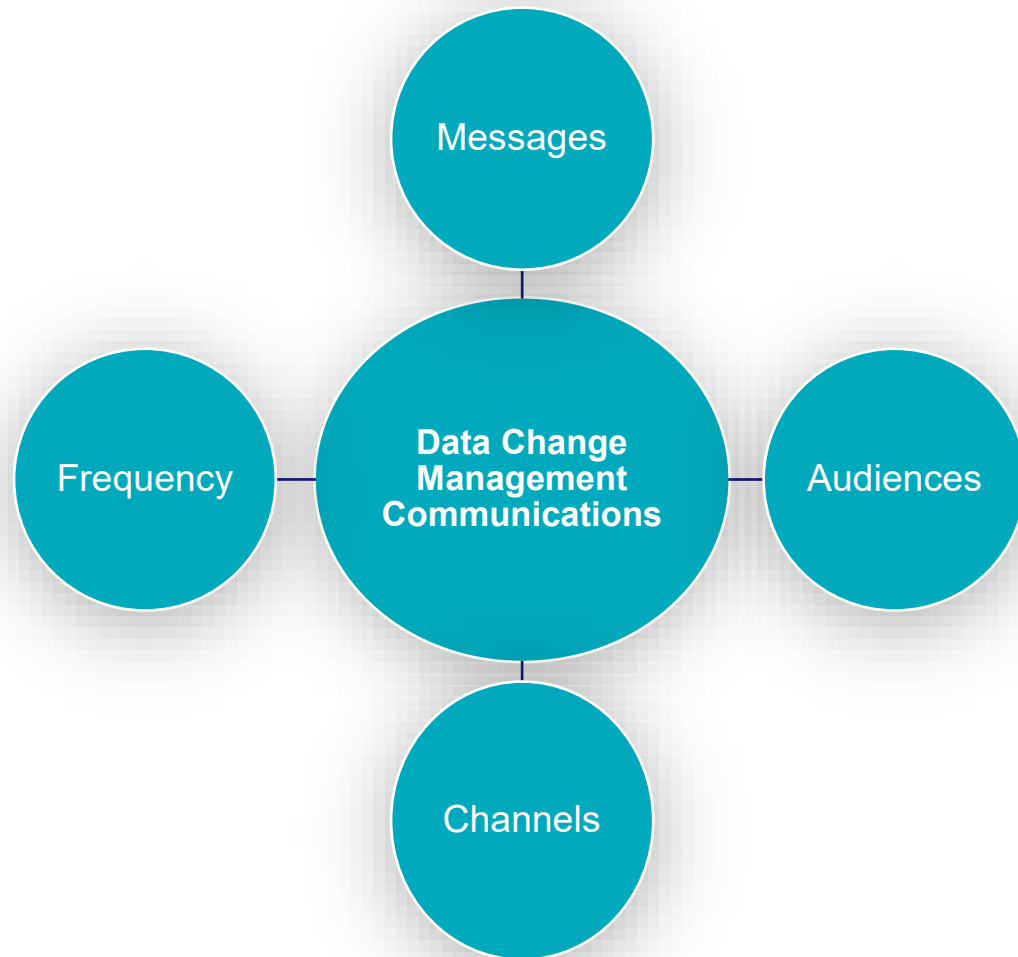
JOURNEY TOWARDS A
DIGITAL CULTURE



Example of Tracking Progress

	Project Start	After 3 months	After 6 months	1 – 2 months post implementation
Assessment	1 st Assessment	2 nd Assessment	3 rd Assessment	4 th Assessment
Metric	Baseline POLL result: 30% employees support the strategic direction and vision	Updated POLL result: 55% employees support the strategic direction and vision	Updated POLL result: 80% employees support the strategic direction and vision	Updated POLL result: 95% employees support the strategic direction and vision
How did we get here?	<ul style="list-style-type: none"> Developed case for change and communication strategy Identified champions 	<ul style="list-style-type: none"> Communication plan executed to next level of managers Increased engagement across groups 	<ul style="list-style-type: none"> Follow-up with conversations and Q&A on feedback received – isolate and address concerns Address negative behaviors 	<ul style="list-style-type: none"> Integrate feedback received Maintain open communication with champions and employees
What else should we do?	<ul style="list-style-type: none"> Engage champions Develop detailed communication plan with commitment from senior leaders/champions 	<ul style="list-style-type: none"> Schedule Town Hall & Q&A sessions Complete SharePoint site Identify negative behaviors 	<ul style="list-style-type: none"> Share success stories and learnings at local/department level meetings 	<ul style="list-style-type: none"> Continue to iterate and update strategy

Communication Considerations



- Like any transformational initiative, data change management carries lofty goals... and potentially organizational skepticism
- In many organizations data problems are pervasive, and employees can be cynical about efforts to fix them
- Proactive, repeated, targeted, and transparent messaging that emphasizes benefits is critical to success – winning the hearts and minds of the organization
- The communications should seek to address key questions:
 - ✓ What is data culture change management?
 - ✓ How will my work be impacted
 - ✓ How will the process work?
 - ✓ How will I/my team be engaged?
 - ✓ Who is leading the effort?
 - ✓ What is the timing?
 - ✓ How is success being measured

Communication Plan - example

Data Governance Communication Framework

	Message	Purpose / Objective	Responsibility or designee	Primary Audience	Frequency	Channel
Pre-work / Launch	Program Collateral: ❑ Charter ❑ Guiding Principles ❑ Operating Model ❑ Rules of engagement ❑ Process Workflows ❑ Policies	❑ Generate Enterprise Data Governance (EDG) program awareness ❑ Development of EDG reference documents and initial operating model ❑ Develop, leverage enablement tools for use by working groups and data stewards	❑ Enterprise Data Governance Office ❑ Data Governance Coordinator	❑ Data Governance Team (CCD, Agencies) ❑ Enterprise Data Governance Council	❑ Initial development/launch ❑ New development and updates	❑ Intranet ❑ Email
	Enterprise Data Governance Office Program announcement	❑ Launch Enterprise Data Governance Office ❑ Create awareness of Community of Practice and Data Governance Organization structure, and business value	❑ Enterprise Data Governance Lead ❑ Executive Sponsors ❑ Data Governance Coordinator	❑ All	❑ Program Initiation	❑ Intranet ❑ Email ❑ All-hands with agencies if possible – staggered when onboarding new agencies
	Enterprise Data Governance Office Structure announcement	❑ Create awareness of the Data Governance team, value ❑ Instruction on how to engage ❑ Initial use cases; demonstrate value	❑ Executive Sponsors ❑ Enterprise Data Governance Lead ❑ Data Governance Coordinator	❑ All	❑ Program Initiation ❑ Update as required	❑ Intranet ❑ Email

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Data Governance Communication Framework

Message	Purpose / Objective	Responsibility or Designee	Audience	Frequency	Medium
Data Governance Orientation Materials	❑ Data Governance Awareness ❑ Purpose ❑ Value	❑ Data Governance Office ❑ Communications Specialist /designee ❑ Other (on-line, etc.)	❑ All	❑ Program Initiation ❑ On demand (new employee orientation, new projects)	❑ Email ❑ Newsletter ❑ Intranet
Data Governance Engagement Process	❑ Explain process on how to engage with Data Governance	❑ Data Governance Lead ❑ Data Governance Specialist	❑ Data Creators ❑ Data Consumers ❑ Data Governance Team	❑ Program Initiation ❑ On demand	❑ Email ❑ Newsletter ❑ All-hands Meetings
Data Governance Case Studies / Success Stories; dashboard	❑ Demonstrate Business Value ❑ Demonstrate Data Governance Efficiencies ❑ Build program advocacy	❑ Data Governance Lead ❑ Data Steward Consultant ❑ Data Governance Specialist (template / dashboard design)	❑ Senior Leaders ❑ CCD, Agency Stakeholders	❑ Initial and Ongoing	❑ Intranet ❑ Email ❑ Newsletter ❑ All-hands Meetings

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Training Plan

Level	Foundational	Intermediate	Advanced
Education	<ul style="list-style-type: none"> Self-paced foundational training courses and workshops 	<ul style="list-style-type: none"> Self-paced intermediate training courses with business leadership focus 	<ul style="list-style-type: none"> In-depth training with help from partners (LinkedIn, Coursera, etc.,)
Exposure	<ul style="list-style-type: none"> Champion lessons, informal coaching, newsletter, lunch & learn, user group, workgroup for key data concepts Can become a champion and provide lessons or informal sessions for other data citizens on the data domain, key concepts depending on field of expertise 		
Experience	<ul style="list-style-type: none"> 2 months on the job experience Learn about their domain assets 	<ul style="list-style-type: none"> 2 months on the job experience Lead domain related approval processes 	<ul style="list-style-type: none"> 2 months on the job experience Fully participating in data governance and applying in business process activities
Expectation	<ul style="list-style-type: none"> Know how business transforms to data domains & concepts Know governance functional responsibilities 	<ul style="list-style-type: none"> Lead curation of data domains, sub domains and finer level definitions and relating to technical level metadata 	<ul style="list-style-type: none"> Propose and approve domain decisions, process and data definitions

- **Foundational (10 – 15 hours)**
 - Data Literacy 101
 - Data Domain & Common Data Element Definitions
 - Data Vision, Operation Principles & Capabilities
 - Data Governance 101
 - Data Governance Framework & Operating model
 - People, Process, Standards and Technology
 - Benefits and value of Data Governance
 - Data Governance Roles & Responsibilities
 - Data Security and Privacy Concepts
- **Intermediate (20-25 hours)**
 - Data Ethics, data driven decision making
 - Managing and controlling Enterprise Data
 - Data Life Cycle and Recognizing Data Assets
 - Intelligent Enterprise Through Data Governance
 - AI Governance
- **Advanced (TBD)**
 - More technical training on capabilities and concepts with external partnership like LinkedIn, Coursera, etc..

Data Literacy Concepts



What? Data Literacy ensures that people have a fundamental understanding of data, and how to analyze it and use it for decision making and action



Who? Data Citizens (people) at all levels of the organization



Where? In processes involving people, business and technology



Outcome? Empowers employees to uncover insights, ask questions, think critically, challenge conclusions with data and experimentation and work towards the north star ('Data Driven Culture')



Data Literacy creates a wide spectrum of results to increase an organization's data maturity

Data Literacy Skill Guide - example

	DGO Lead	Data Consumer	Data Owner	Business Data Steward	Data Arch / Tech Steward	Business, Data Quality Analyst	System Admin.	Data Scientist
Data Governance	4	2	3	3	2	2	1	1
Application Knowledge	2	1	1	1	4	2	4	
Business Domain	3	3		3	2	3		
Glossary / Data Dictionary	3	2	4	4	4	3		
Regulation / Policy	2	2	3	3	1	2		
Admin / DBA	1						4	
Security	1				4		4	
Analytics / Process	2		3	3				4
Training / Soft Skills	4	3	3	3	3	3	2	3

Skill Level Required:

4

3

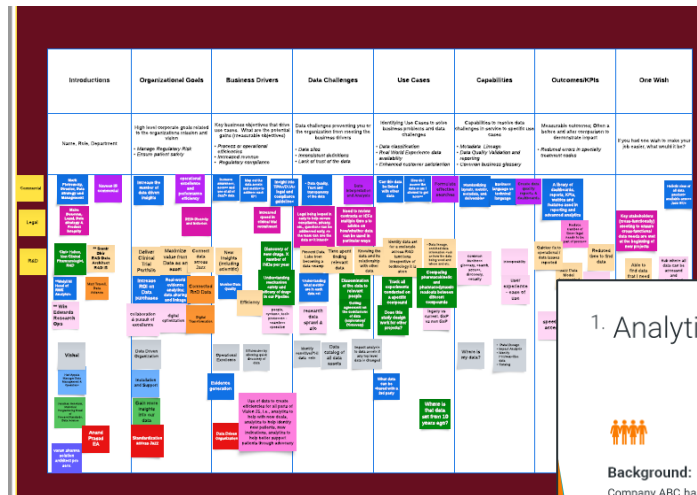
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1

Strong

Awareness

Influencing Change through Business Use Case Identification and Implementation



1. Analytic Optimization Use Case Overview



Background:

Company ABC has volumes of data, internal and external. There is a need to provide the capability to leverage, scientific, operational, RWE and analytic platforms; breakdown the silos.



Goals:

The goal of this use case is to provide accessible, standardized, quality data to reduce time spent finding, preparing and defending data, and more time analyzing, visualizing and presenting.



Benefits:

Improved decision making.
Better clinical trial management.
Rapid discovery and actionable insights.
Improved speed to market.
Optimized data discovery.



Outputs:

Data extracts to enable analysis on specific clinical trials to increase speed-to-market.
Easily accessible data information.



Data Sources:

Redshift DB
AWS FSX
AWS S3
SQL
Tableau
SharePoint

2. Data Acquisition Use Case Overview



Background:

Customer ABC purchases data, Real World Evidence (RWE), from third parties for use in clinical trials. Access to the data is heavily controlled contractually, specifying its use.



Goals:

The permission rights (data access) and usage of the data need to be documented in a centralized repository. Additionally, having visibility of the data in a centralized repository allows Jazz what, if any, data needs to be acquired from a 3rd party.



Benefits:

More effective trials, Speed-to-market through the augmentation of data.
Visibility across the organization of all third-party data; and accessibility.



Outputs:

Visible inventory of third-party RWE, with clearly defined access rights.
Reduction in the potential of purchasing duplicate studies and associated savings.
Contractual compliance, 3rd party data usage control.



Data Sources:

Redshift DB
AWS FSX
AWS S3
SQL Server
Tableau
SharePoint Online
INFA Integrations

Pulling it all together

Key Themes for a Successful Program

- Planning is essential
 - Once you lose peoples interest, it is difficult to get back
- Tailored communication is key
- Be inclusive of business and technical stakeholders at all levels
- Centralize around use cases
- Start with material that is currently available
 - There is no need to start with a blank piece of paper

Q&A