



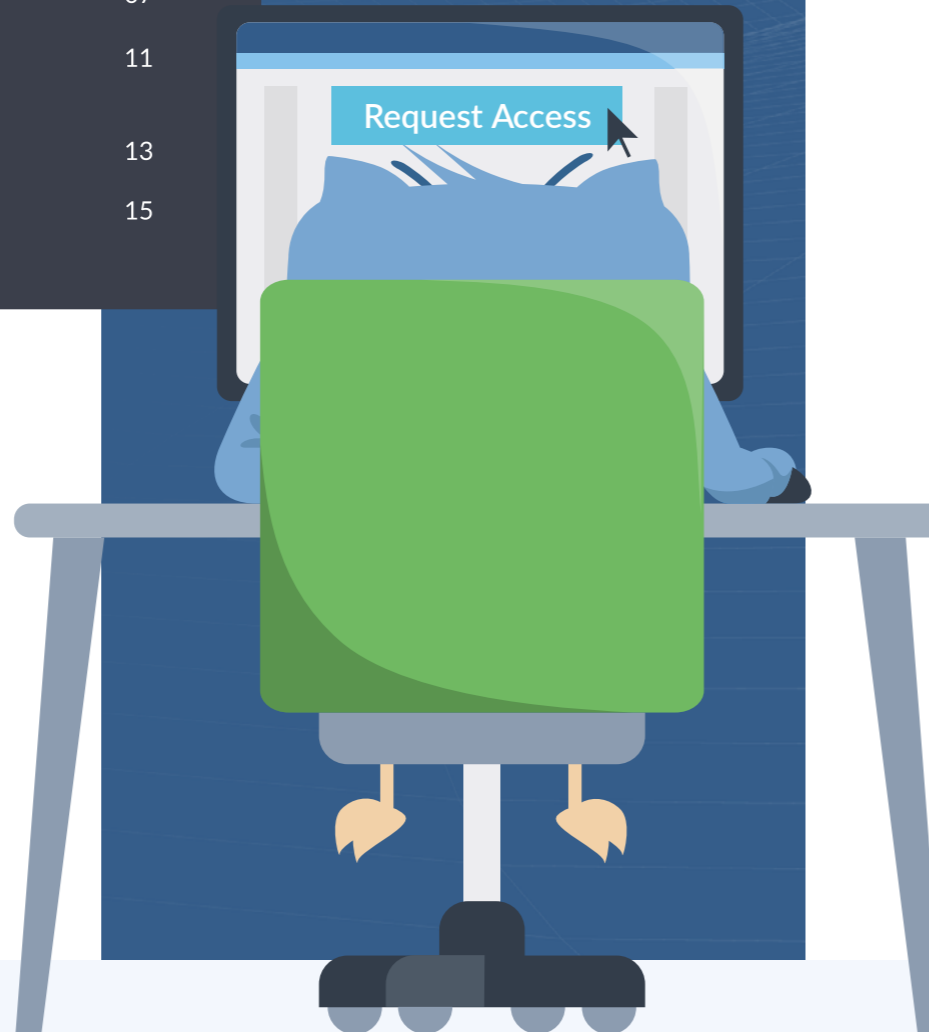
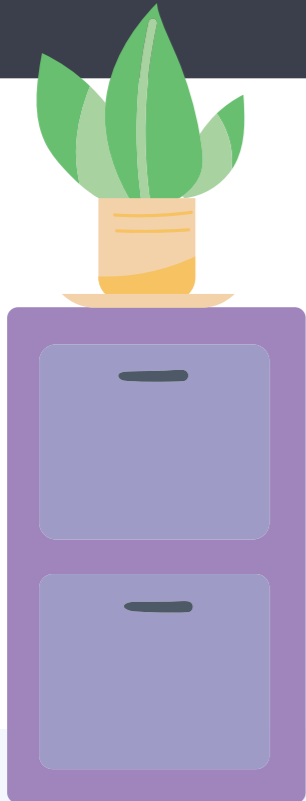
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# The Agile Data Governance Playbook

A guide to implementing Agile Data  
Governance in your organization

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## Introduction

Traditional data governance doesn't work in today's modern enterprise. Too often, these programs are so focused on restricting access to data that they run afoul of the original mission of data governance – to connect and empower data and analytics teams with the knowledge needed to make smarter business decisions.

More than just risk and compliance, data governance should holistically address the entire data and analytics process, enabling safe, efficient, and reliable project collaboration.

The solution? [Agile Data Governance](#).

Unlike top-down data governance strategies that seek to control and parametrize every aspect of data access, Agile Data Governance empowers all stakeholders to participate in an inclusive data and analytics process, aiming to increase productivity in a safe, consistent, and auditable way.

It adapts the best practices of Agile and Open software development to data and analytics, iteratively capturing knowledge as data producers and consumers work together so everyone can benefit.

### Traditional Data Governance

- Risk avoidance and compliance
- Top-down policies
- Cumbersome processes

### Agile Data Governance

- Increasing the business value of data
- Focus on collaboration and transparency
- Consistent methodologies that drive data literacy

Today organizations and agencies in nearly every industry are adopting Agile Data Governance practices to drive faster and more accurate business insights, reduce redundant and inefficient work, increase reuse of data products, and build thriving data cultures.

While that all sounds great in theory, what does it look like in practice? And how do you implement Agile Data Governance in the enterprise?

We're glad you asked. This ebook covers everything you need to know to get started, including:

- Tips for achieving buy-in for cultural change
- Why you need a governance committee and how to select an executive sponsor
- Advice on selecting the principles that will act as your governance north star
- How to identify and assign data stewards and ownership
- Guidance on running your first Agile Data Governance sprint and prioritizing use cases

**Let's dive in.**

## Step 1: Achieving Buy-in for Cultural Change

Anyone who has worked in an enterprise organization can tell you: change is hard. Especially when it comes to shifting away from fully entrenched principles and processes like traditional top-down governance – even if it's not working.

So how do you convince data leaders and other key stakeholders that the only way to achieve a data-driven culture is by switching to Agile Data Governance?

One way to facilitate the conversation is to get real about the state of your data governance program today. Here are a few questions you can ask that will bring attention to common challenges Agile Data Governance helps you overcome:

- Have we defined roles for data consumers, enablers and producers in the company?
- Do our data teams collaborate on and create reusable data assets to answer business questions?
- Do our governance tools and processes give us real and real-time visibility into the use and value of our data?
- Have we observed a decrease in our costs and an increase in our revenue as a result of our team collaborating over data assets?
- Has the use of data assets actually increased? Is it increasing or can we measure it at all?



### Tool

#### AGILE DATA GOVERNANCE SCORECARD

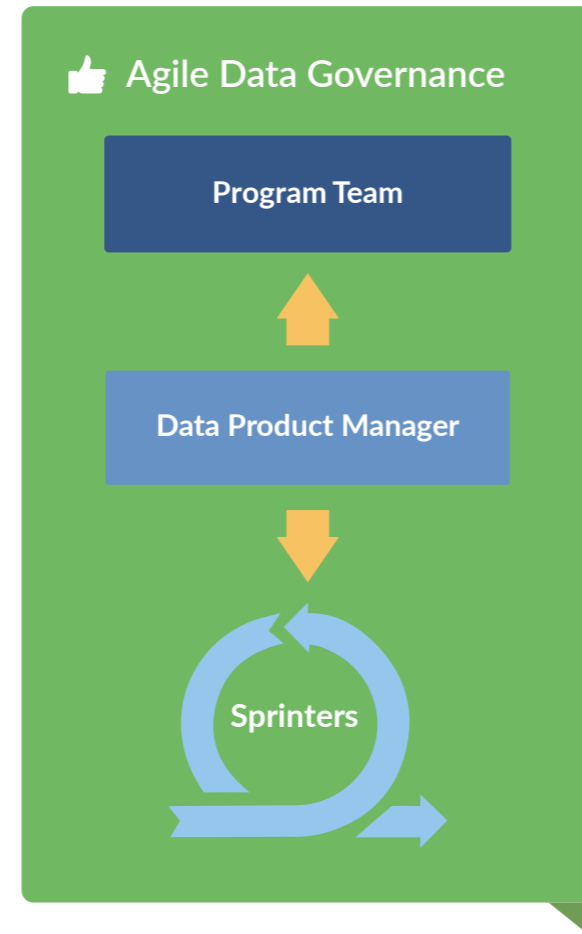
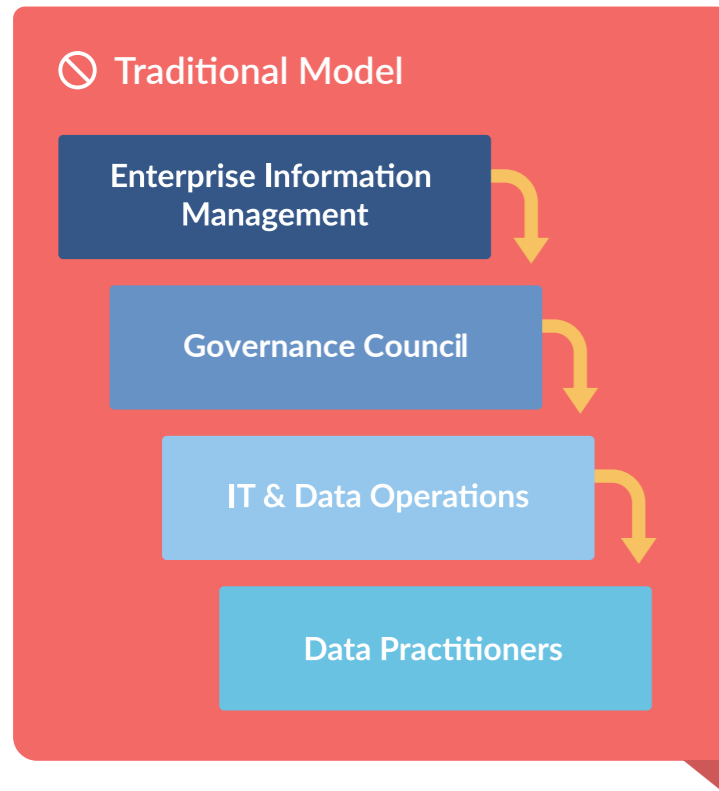
This assessment will score your organization's current data and governance process, and is a great tool to iteratively track your progress towards a truly agile governance process.

[Get Your Assessment](#)



## Step 2: Establishing an Executive Sponsor and Governance Committee

The reason many traditional data governance programs fail is because organizations adopt a top-down or “waterfall” structure. Using this model, all decisions are made at the top by a very small group of individuals. Their job is to plan out every detail of the governance program and then cascade policies down to practitioners.



As Tomasz Tunguz describes in his book, [Winning with Data](#), there are several problems with this methodology:

- These programs lack agility and resilience due to bottlenecks at the data producer/consumer threshold
- Data teams spend more time navigating bureaucracy than working with data, which negatively impacts ROI
- In most organizations, those who try to understand the availability and use cases of data assets encounter inefficiencies, partial answers, and confusing systems
- When data work isn't transparent, people don't trust it, leading to data brawls, a.k.a. people showing up with different versions of the same analysis and arguing over the method by which they got there
- Limiting collaboration and access means missing out on new ideas and opportunities for innovation

The hard truth is that it's impossible to build data-driven cultures under waterfalls. In fact, 69% of data engineers say their current governance policies make their jobs more difficult. You won't gain adoption within your organization if you don't bring your community along for the ride.

Agile Data Governance addresses the issue by establishing a cross-functional governance committee that oversees the success of your program and is responsible for establishing your guiding principles (next chapter).

### Governance Committee Roles and Responsibilities

- **Executive sponsor** – Responsible for the successful delivery of the program to the business, providing necessary resourcing and air cover to the project teams
- **Program manager** – Helps define program use cases and deliverables; plans strategic goals and success criteria to support long-term program success
- **Senior data team members** – A cross-functional team of IT, legal, governance, and business users (data architects, data engineers, data scientists); provide insights and feedback into program performance
- **Data stewards** – Assist in program implementation and policy enforcement; come from business domains to contribute expertise

By opening up some traditionally restricted governance functions to a broader audience, you gain a better understanding of who, what, why, and where data is used, enabling more informed decision making. It also sends a signal of inclusivity to the organization, which can help achieve further buy-in, and instill confidence that your governance program is representative of all user groups.

## Step 3: Aligning on Principles

The first job of your governance committee is to align on and document the [principles](#) that will guide your Agile Data Governance program. Think of these principles as your North Star, informing all data decisions made in the enterprise.

When selecting principles, consider the specific goals you want your program to achieve – strategic, tactical, and operational – and develop a framework that sets you up for success. Do you want to increase the value of data work? Improve collaboration and communication? Drive operational efficiency? Create a culture of data use and re-use?

For leading data and analytics company, Verisk, their primary objective is to ensure the responsible and ethical use of data and AI in business decision making. Partha Srinivasa, Chief Data Officer at Verisk, joined data.world's Tim Gasper and Juan Sequeda for an episode of [Catalog & Cocktails](#) to discuss the SPIRIT framework and how it helps the company more effectively govern data.

According to Srinivasa, **SPIRIT** stands for:

**S**ecure  
**P**rivate  
**I**nclusive  
**R**eliable and responsible  
**I**mpartial  
**T**ransparent

By aligning around these principles, Verisk has enabled every one of its employees – not just IT – to understand, respect, protect, and accelerate the use of customer data while providing appropriate guardrails.



### Case Study



“Now, because this data is immediately available, and easily accessible, it actually enables us to launch newer products. And last but not the least is basically we have seen a significant amount of collaboration between the business units.”

Partha Srinivasa  
Chief Data Officer, Verisk

[View the Case Study](#)

## Remember,

Agile Data Governance is based on the idea that governance is iterative and principles can be improved upon over time. So don't spend months aligning on policy before kicking off your first use case – just get started.

## Agile Data Governance Guiding Principles

1. Governance should increase transparency, trust, understanding, and speed.
2. Start with the business problems and analytics questions you have today.
3. Iterate quickly to build better habits and get to value faster.
4. One person's work should help everyone else's.
5. Give all stakeholders ways to add knowledge and improve data assets.
6. Keep people, data, docs, and analysis connected and accessible from the beginning.
7. Make documentation easy and iterative or it won't happen.
8. Promote good statistical and scientific methods.
9. Analytics is valuable while it's happening, not just when it's "done."
10. Make the user experience twice as good as the products and practices it competes with to earn adoption.

## Step 4: Identifying Stewardship and Ownership

One of the pitfalls of traditional governance is the belief that all data assets must be managed entirely by a centralized group of data stewards. In enterprises with thousands if not millions of datasets, this is not sustainable. Stewards, many of whom take on this responsibility in addition to their day-to-day roles, are quickly overwhelmed and there is a natural inclination to shut down access rather than fight a losing battle.

Adding roles like data product managers and knowledge scientists makes governance easier and reduces the burden on data stewards. These professionals act as scrum masters or product owners would if they were developing software, but with data assets.

According to [Gartner](#):\*

“Effective data management and governance are people-driven practices. They require consistent and high-quality interaction between a variety of roles, and these roles have grown more diverse and distributed over time. Maintaining communication and collaboration is even more critical in the current conditions, creating an opportunity for data and analytics teams to add value by furthering the adoption of new types of tools and approaches.”

By practicing Agile Data Governance, your pool of [stakeholders](#) expands to include:

- Data producers: data stewards, data engineers, data product managers
- Data consumers: business decision-makers, analysts, data scientists, knowledge scientists
- Domain experts: others with deep knowledge of the problem

\* Gartner, 10 Data Management and Governance Actions to Reset, Increase Impact and Enable Remote Work, Ted Friedman, May 6, 2020

## Introducing Data Mesh and the Rise of Domain-Driven Architecture

You’ve likely heard a lot about data mesh lately, but do you know what it means and how it empowers enterprises to scale Agile Data Governance across the enterprise?

Here’s a quick explainer:

Data mesh is a type of data architecture that makes data accessible, available, discoverable, secure, and interoperable.

It combines these two principles:

### Domain-driven decentralization

Data is owned by the people who understand it best ( a.k.a. the domain). Example: The finance team owns the finance data and the HR team owns the HR data – no single centralized entity owns all an organization’s data. In this scenario, domain owners have the responsibility to be good stewards of that data, and they are explicitly identified and known to the rest of the organization.

### Data as a product

Data is considered a product by each team that publishes it. A team owns data just like a team would own the set of services in their business. In other words, you treat other teams as internal customers of your data. Your data isn’t just a commodity; it’s something you publish for other people to gain value from.

If you’d like to learn more about the data mesh concept, [watch Zhamak Dhegani’s keynote address](#) from the Thoughtworks XConference.

Welcoming a diverse group of contributors improves the resiliency of your governance program. Using the model, stewards can be assigned to manage your most popular and broadly used data assets, while domain experts hold the line in their specific fields of expertise. Your least popular asset can then be relegated to governance by committee so no one individual must devote extensive time and resources to its management.

At minimum, start by identifying domain stewards and then, within the use cases you prioritize in Step 5, dig deeper to assign granular stewardship as needed to achieve minimum effective governance (similar to the concept of an [MVP](#)).

As you assign stewards and ownership responsibilities, remember to think at least one level down – there should always be a backup to ensure knowledge is not lost in the event of an employee departure.



## Catalog & Cocktails

Who’s on your data team?

You don’t have to have the word “data” in your title to be a data person. For example, Juan and Tim don’t, but they are very much part of our data team. In this episode, we will chat about the myriad personas that interact with data, from producers to consumers and everything in between.

[Listen to the Podcast](#)



## Step 5: Preparing for Your First Agile Data Governance Sprint

Top-down governance takes a 'boil-the-ocean' approach to implementation and is centered around multiple user groups and/or use cases, often resulting in lengthy implementations and unnecessary work that is not directed by actual end-user feedback.

Agile Data Governance, on the other hand, adheres to a crawl-walk-run philosophy where efforts are focused around building a prioritized initial use case involving known personas and a small number of data and/or analytics sources. This gets data into the hands of end users fast so you can immediately begin to measure the impact of your project, and iterate for future use cases.

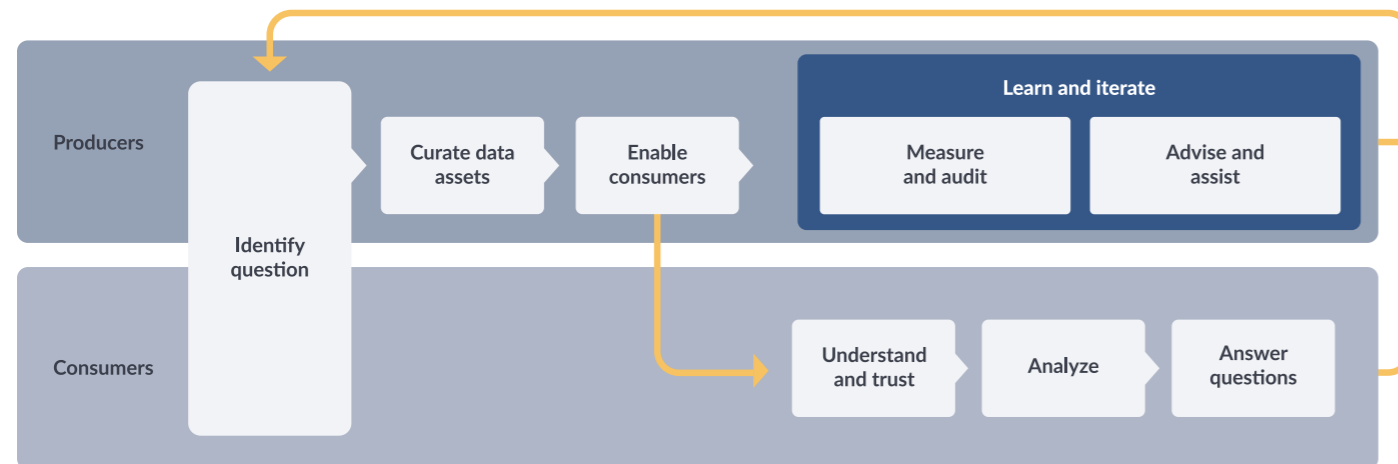
### Process Overview

Agile Data Governance uses a flywheel model with top-down curation from experts and data owners who publish to and enable day-to-day users. Bottom-up consumption and crowdsourcing helps contribute back use cases, metadata suggestions, and analysis insights.

Governance and auditing/measuring is an activity that is an umbrella over the entire program. Overall, the company works together to collect, enrich, and iterate on institutional knowledge.

As you onboard new use cases, new departments or user groups, and new data and analysis source systems, consider how each of these steps can be done successfully, and how the overall cycle can be performed more quickly, effectively, and sustainably.

### The build-measure-learn loop of Agile Data Governance



## Building a Use-case Backlog

A key component of implementing Agile Data Governance is building a use-case backlog. At its core, a use-case backlog is a prioritized list of the common business questions you want your program to solve for.

Here are a few tips to help you get started:

- Create **epics** to capture top-level questions; it's helpful to express these as scientific hypotheses, i.e. "Increasing user engagement will result in a net revenue retention increase."
- This then drives you create stories like "I need a consistent measure of engagement" and "define net revenue retention"
- The stories bucketed under each epic should align to a unit of work; example: curation and data acquisitions, analytics (modeling, dashboards, reports, metrics, etc.)
- Align on a **peer-review process** and definition of done to ensure stories are satisfactorily completed before moving on to new use cases

## Iterating

Upon completion of the initial use case, it is important to perform a retrospective and document what you learn. To borrow again from our friends in Open and Agile software development at [Product Plan](#):

A retrospective is a meeting held after a product ships to discuss what happened during the product development and release process, with the goal of improving things in the future based on those learnings and conversations.

For those who have never participated in a retrospective before, [Atlassian Team Playbook](#) provides detailed instructions for running one.

Applying this methodology will give you detailed insight into what went right, what went wrong, and what you can do to improve future use-case implementations.



## WEBINAR

Is your data governance program agile enough to support business innovation?

In this webinar, we cover the evolution of modern data governance and share practical advice for how to deploy agile data governance practices in your organization.

[Watch the Webinar](#)

## Conclusion

Iteration is a central tenet of Agile Data Governance. You can't simply implement the program and walk away.

To be successful, you need to revisit your Agile Data Governance charter twice a year to ensure it stays aligned with your overall organization goals and objectives. That means establishing KPIs early and measuring against them from the beginning. An [enterprise data catalog](#) like data.world can help by providing clear insight into the metrics that matter most to your business.

For more information on implementing an Agile Data Governance program, [speak with a member of the data.world team](#).

## About data.world

[data.world](#) is the enterprise data catalog for the modern data stack. Our cloud-native SaaS platform combines a consumer-grade user experience with a powerful knowledge graph to deliver enhanced data discovery, agile data governance, and actionable insights. data.world is a Certified B Corporation and public benefit corporation and home to the world's largest collaborative open data community with more than 1.3 million members. Our company has close to 50 patents and has been named one of Austin's Best Places to Work six years in a row. Follow us on [LinkedIn](#), [Twitter](#), and [Facebook](#), or [join us](#).



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