# **Collibra Business Case Questionnaire**

**Data Governance**

**Financial Modeling Questions**

The following document contains questions we ask as part of the Data Governance financial modeling survey. The results are used to drive further analysis that may include interviews and/or workshops to confirm and complete your requirements and our understanding. Participation in the survey dramatically reduces time that would be required in interviews or team meetings to gather the same information.

The answers from this survey will be input into the Data Governance ROI financial model.

## Role Identification

#### 1) Please indicate the role that fits you best\*

[ ] IT

[ ] Business

## Business Objectives

#### 2) What domains have high value and should be considered for implementation or improvement?

[ ] Customer (either organization or individual)

[ ] Product

[ ] Household

[ ] Vendor or Supplier

[ ] Location

[ ] Employee

[ ] Compliance, Security/Privacy

[ ] Regulatory Reporting/Certification

[ ] Analytics/BI/Big Data

[ ] Physical Assets

[ ] Healthcare Provider

[ ] Patient

[ ] Healthcare Payer

[ ] Citizen

[ ] Parts

[ ] Materials

[ ] Services

[ ] Other

#### 3) Please list the business organizations that are key stakeholders in the Data Governance organization

Org 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Org 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Org 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Org 4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Org 5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Org 6: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 4) Rate the importance of achieving the following outcomes.

5=Critical, 3=Important, 1=No interest

|  |  |
| --- | --- |
|  | **Rating (1-5)** |
| Increase Data Governance maturity and adaption |  |
| Increase in reporting accuracy and traceability |  |
| Increase in data understanding, integration and consistent usage |  |
| Improved Data Quality for Critical Data Elements |  |
| Increase in the Trust of data externally and internally |  |
| Reduced risk of improper data usage |  |
| Reduced cost of operations |  |
| Reduced risk of security and privacy data misuse |  |
| Improved response and resolution to data issues |  |
| Reduced risk of regulatory fines |  |
| Increased usage of approved authoritative data sources |  |
| Reduction in erroneous decisions from non-authoritative data sources |  |
| Other (fill in) |  |
| Other (fill in) |  |

#### 4) Key Business Drivers for implementation of Data Governance

High, Medium, Low

|  |  |
| --- | --- |
|  | **Importance** |
| Reduction in Regulatory Fines and Penalties |  |
| Decrease Customer Churn |  |
| Loss of market share |  |
| Market Capitalization Reduction |  |
| Increased accuracy of upsell/cross sell campaigns |  |
| Increase accuracy of customer data |  |
| Privacy breach risk avoidance |  |
| Fraud reduction |  |
| Risk score improvement |  |
| Increased accuracy of management reporting |  |
| Increased reliability of business metrics |  |
| Standardize Business terminology, roles and responsibilities and metrics |  |
| Identify User access capability to authoritative sources |  |
| Implement data accountability and improve data life-cycle processes |  |
| Implement improved Data Quality infrastructure processes and metrics |  |
| Implement Data Issue Resolution Management processes |  |
| Implement data traceability and supply chain recording for all CDE |  |
| Improve access to data and enterprise usage for all Reference Data |  |
| Improve accessibility and enterprise usage of all Master Data |  |
| Implement capability for aligning BI, Analytics and Big Data usage and metrics |  |
| Reduced cost of third party data cleansing and matching services |  |
| Implement Big Data Analytics and Compliance |  |
| Other (fill in) |  |
| Other (fill in) |  |

## Benefit Input

#### 7) Provide the projected benefit, cost avoided or the revenue increase for the key business drivers supporting your business case

This is an initial estimate for the most important Business Drivers. Please complete the Collibra\_ROI\_Worksheet with your detailed financial estimates. For example: If ‘Reduction in Regulatory Fines’ is a key business driver you may use a metric such as ‘amount anticipated to be fined without DG' as a base estimated benefit. Then define an assumption for the DG Benefit% (% that can be reduced in this case by the implementation of DG). These will be used to compute the ‘Year 1’ value of Data Governance. In this case, if your assumption is that you will pay $2,000,000 in fines, and the DG Benefit% is 25%, then the ‘Year 1’ benefit will be $500,000. Then estimate your Annual % of Improvement.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Estimated Benefit (+/-)** | **DG Benefit %** | **Annual % Improvement** | **Assumptions** |
| Reduction in Regulatory Fines and Penalties |  |  |  |  |
| Decrease Customer Churn |  |  |  |  |
| Loss of market share |  |  |  |  |
| Market Capitalization Reduction |  |  |  |  |
| Increased accuracy of upsell/cross sell campaigns |  |  |  |  |
| Increase accuracy of customer data |  |  |  |  |
| Privacy breach risk avoidance |  |  |  |  |
| Fraud reduction |  |  |  |  |
| Risk score improvement |  |  |  |  |
| Increased accuracy of management reporting |  |  |  |  |
| Increased reliability of business metrics |  |  |  |  |
| Standardize Business terminology, roles and responsibilities and metrics |  |  |  |  |
| Identify User access capability to authoritative sources |  |  |  |  |
| Implement data accountability and improve data life-cycle processes |  |  |  |  |
| Implement improved Data Quality infrastructure processes and metrics |  |  |  |  |
| Implement Data Issue Resolution Management processes |  |  |  |  |
| Implement data traceability and supply chain recording for all CDE |  |  |  |  |
| Improve access to data and enterprise usage for all Reference Data |  |  |  |  |
| Improve accessibility and enterprise usage of all Master Data |  |  |  |  |
| Implement capability for aligning BI, Analytics and Big Data usage and metrics |  |  |  |  |
| Reduced cost of third party data cleansing and matching services |  |  |  |  |
| Implement Big Data Analytics and Compliance |  |  |  |  |
| Other (fill in) |  |  |  |  |
| Other (fill in) |  |  |  |  |

## Investment Input

#### 8) Software License

Initial: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 9) Hardware

Initial: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 10) Operations (Internal Administrative)

Year 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 11) Implementation - Consulting

Year 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 12) Implementation - Ongoing Development/Support

Year 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_