CXWG Briefing Note – Data and Data Governance

Executive summary

The CRM and MA solution will be the primary system for managing customer data (International Prospective Student for Phase 1). It will be the master system for various types of marketing and sales-related data. This data may come from external systems like QSES, QTAC, other webinar and social media platforms as well as UQ's enterprise systems such as SI-net, Raiser's Edge and Oracle Service Cloud.

With the diversity of data involved plus the complexity of implementing an enterprise system, the CRM and MA Program is setting up a Data and Data Governance sub-Working Group to enable the CRM and MA system implementation.

Need for a common business language

Implementing an enterprise system and engaging with various stakeholders without a common business language often leads to confusion. As we move towards a One UQ approach, the need for key UQ business terms to be articulated, contextualised and agreed by the business has never been more important. These definitions will also be the basis of the CRM and MA solution implementation.

Need for alignment with ITS

The UQ IT ecosystem is a very complex environment to implement an enterprise system. The working group will provide input on the data requirements. This includes informing what data is required to enable the CRM and MA initiatives, ITS can provide guidance on how to access the data, integration between systems, and what controls must be implemented to safeguard the data, compliance to data standards, and its impact on reporting and analytics.

Objectives

The Data and Data Governance sub-Working Group will enable the CRM and MA solution implementation by:

- Producing a business glossary that documents:
    - The definition and usage of the key business terms related to the CRM and MA solution among the different lines of business within UQ
    - Business rules and acceptable data quality rules for measuring business terms
- Providing guidance and oversight on the architecture and data management including:
    - Technical terms and definitions (e.g. data dictionary)
    - Review of the UQ data architecture as it relates to the CRM and MA solution and what are the expectations of data consumption from CRM and MA system
    - Ensure compliance to standards and regulations/alignment with ITS Data Strategy and Governance Team
    - Review of integration points between UQ systems and the CRM and MA platform.

Benefits to the University

- Promote common understanding and use of business terminologies across the University
- Contribute to the uplift of data quality through consistency of use across UQ
- Provide metrics and reporting on the Future Students acquisition process
- Contribute to the wider UQ data governance initiative being run by ITS
- Alignment to the UQ Enterprise Information Technology Strategy 2021-2023.

Scope

Business data aspects of the following functionalities that is in scope to be delivered in Phase 1:

- Lead Management
- Campaign Management
- Enquiry Management
- Appointments
- Single Customer View
- Reporting

The data architecture and management of information that will be coming into and out of the CRM and MA platform.
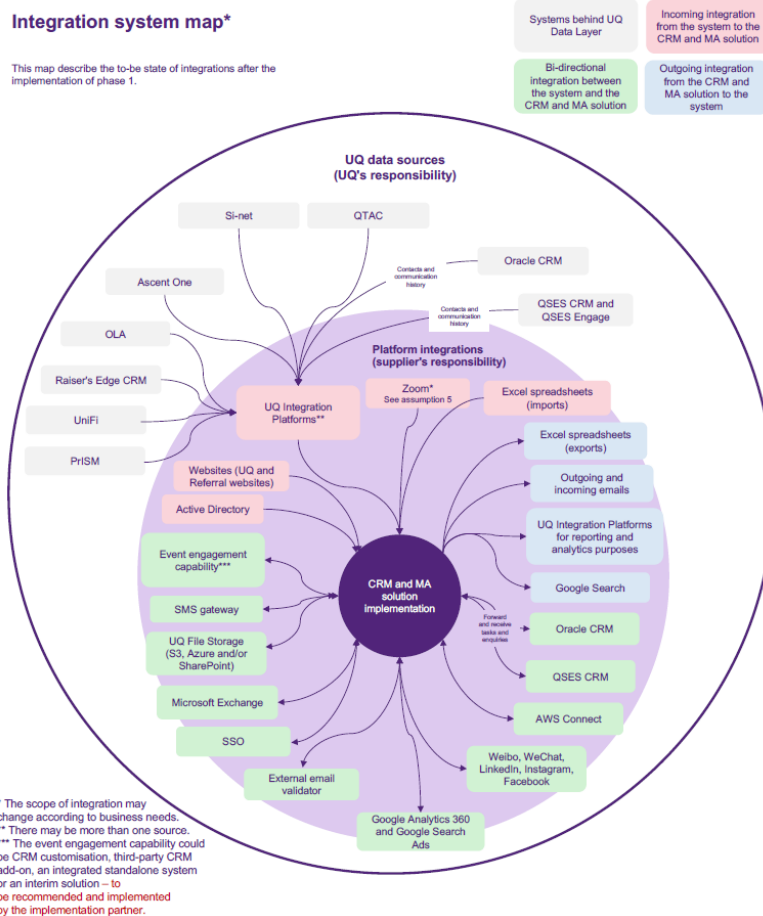
A high-resolution copy is available here (press CTRL + click to follow link).

Key Deliverables of the Data and Data Governance Working Group

- Agreed and signed-off business glossary (definitions and business rules)
- Reviewed and signed-off data architecture and data model
- Recommend supporting data policies and procedures (new or modified) that relate to the CRM and MA solution
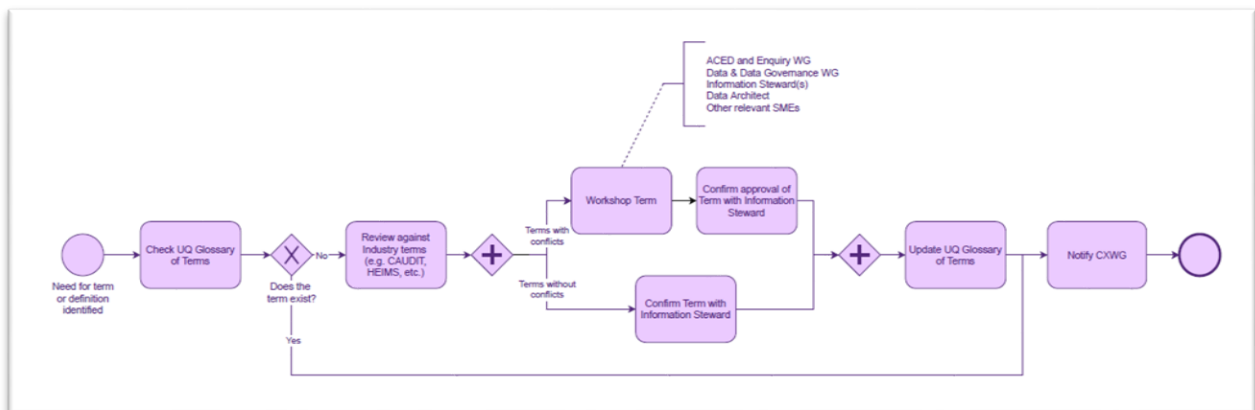
Working Group Members

The Data and Data Governance sub-Working Group will run in two streams via two teams. This is to minimise the impact on people's time and enable the development of deliverables for this working group a faster process.

Team 1 - Business Definitions

The Data and Data Governance sub-Working Group will follow the decision rights laid out in the Information Governance and Management Framework. This framework outlines the hierarchy of relationships describing level of accountability and responsibilities across UQ.

The diagram below illustrates the process of updating the business glossary.

A high-resolution copy is available here (press CTRL + click to follow link).

Team 1 Business Definitions working group members are:

1. Subject matter experts (SMEs) will be the core members to review and refine the definitions for the business glossary and agree on the rules that govern it. They are required to allocate 2-4 hours a week (for a certain period) to participate in project-related activities.

2. Systems Analysts (system/data sources' SMEs) will be confirming/validating the technical definition of the terms. They will be working closely with data analysts from the CRM and MA Project team. They are required to allocate 2-3 hours a week (for a certain period) to participate in project-related activities.

3. Advisors are members of ITS Data Services and Data Strategy and Governance team who will provide guidance and management of CRM data. They are required to allocate 2-3 hours a week (for a certain period) to participate in project-related activities.

Team 2 - Data Architecture and Management

Team 2 Data Architecture and Management sub-working group members are representatives from:

1. ITS Data and Identity Services including the Data Strategy and Governance team who will provide guidance and management of CRM data. They are required to allocate 2-3 hours a week (for a certain period) to participate in project-related activities.

2. SMEs representing the systems that will have direct integration with the CRM/MA Platform (see Platform Integration in the diagram above). They will be engaged on a as needed basis when the implementation partner is onboard. Depending on the complexity, at the minimum they may be required to allocate 2-4 hours over the course of the implementation of Phase 1.

Membership

The membership of the Data and Data Governance sub-Working Group can be found at the CRM and MA Program/Library/Working Groups webpage here.

Deliverables

Deliverable	Tasks and activities
High-level solution architecture	• Present high-level solution architecture as in the Solution Description document • Provide feedback and discuss • Sign-off
Data Policies and Procedures	• Establish need for policy/procedure • Identify existing impacted policy/procedure • Recommend changes to policy/procedure to policy custodian
Business Glossary	• Refine terms and definitions from ACED Framework and Enquiry Framework • Develop the business rules • Validate the data against the source system and business process • Define the data quality rules • Agreement/Sign-off of business glossary

Version Control

Version	Date	Reviewed by	Endorsed by
0.1 Initial draft	8/12/20	Tanya Langhorne Umer Syed	Jeremy Medina
0.2 for approval	16/02/21	Umer Syed	Jeremy Medina
1.0 Approved	23/02/21	Umer Syed	Jeremy Medina and CX Working Group (24/2/21)