

Credit Union Analytics User Group

Virtual Meetup: March 3rd, 2020

Data Governance & Collaboration

With Naveen Jain & Nick Ankarstad

Hosted by:



+ a b | e a u
Credit Union User Group

Agenda

Introduction & Community Updates

Data Governance & Collaboration

Q&A

What's Next?



Introduction & Community Updates

Charlotte Taft | Sr. Director of Business Intelligence

Callahan & Associates | Washington, DC | ctaft@callahan.com



Will We See You At CULytics?

The combined User Groups are meeting at CULytics – in person!

Thursday, April 2:

Networking & Collaboration Meet-Up (9AM-12PM) – Co

Data Visualization User Group (1PM-3PM)

- See others' favorite & most impactful visualizations & reports
- Share best practices
- Give feedback on session content
- Collaborate, laugh, and learn

The CULytics conference has been moved to August 24-26th as a precaution given current health conditions. Stay tuned and consider attending to join an in-person meet-up!

Summit Speakers Include Community Members & Past Presenters

- Melissa Pomeroy
- Kelly Gage
- Nick Ankerstad
- Andrew Bertrand
- Joe Agostinelli
- Mike Lindberg

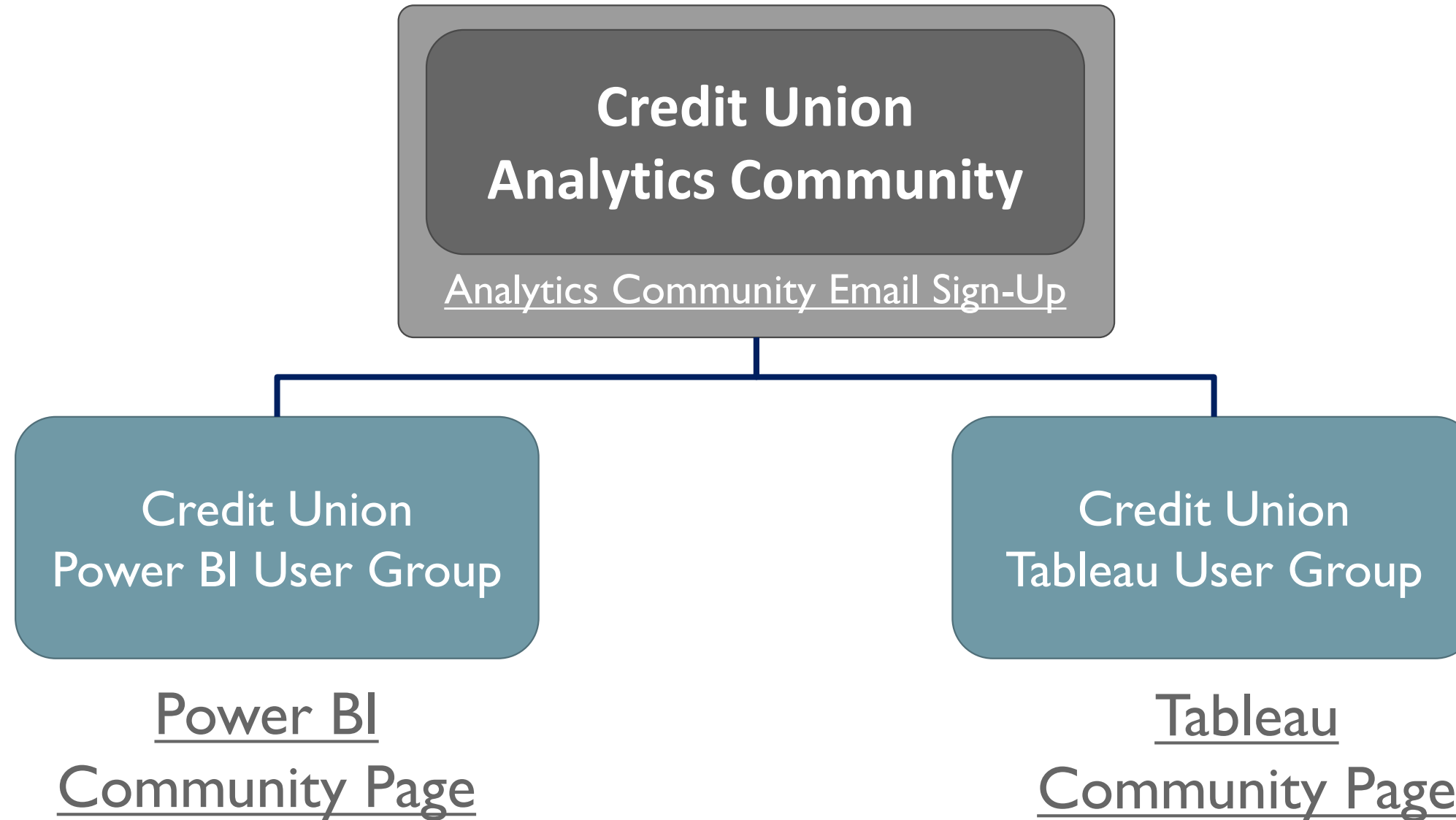
[More Information Here!](#)



CU|Lytics
drive real outcomes

The Community Is Growing

Email ctaft@callahan.com to join the Steering Committee Calls!



Interested in speaking?

Interested in hosting?

Interesting in planning?

Got ideas you want covered?



WE WANT YOU!
FOR THE CUTUG!

<https://community.tableau.com/groups/credit-unions>

Contact Us

Charlotte Taft | ctaft@callahan.com



Data Governance & Collaboration

Naveen Jain

Founder & CEO

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Nicklas Ankarstad

Sr. Manager, Advanced Analytics & BI

Alliant Credit Union

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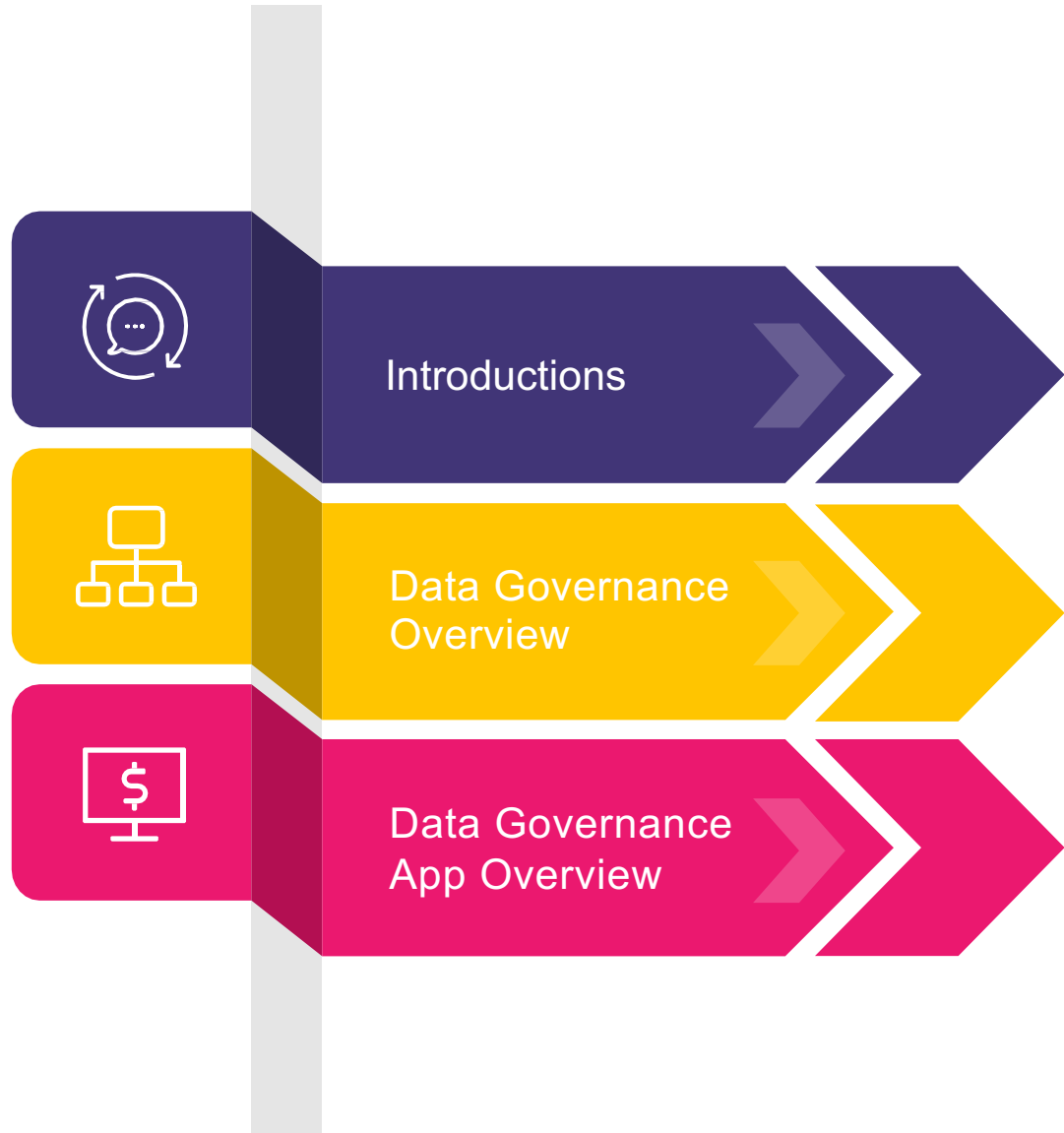


Data Governance

Naveen Jain
CU|Lytics

Nick Ankarstad
Alliant Credit Union

Agenda



About Naveen Jain

Credit Union Leader Experienced In Actionable Strategic Planning, Data Analytics, Marketing, And Innovation That Deliver Immediate ROI



- Former VP of Digital Analytics at First Tech Federal Credit Union (\$12B) - Responsible for building the enterprise data analytics practice from ground up, to enable the generation of new opportunities that meet member needs while ensuring the correct and trusted data is available to grow revenue, drive operational excellence, contain costs, reduce risk and meet/exceed regulatory requirements across all lines of business.

● Naveen.jain@culytics.com

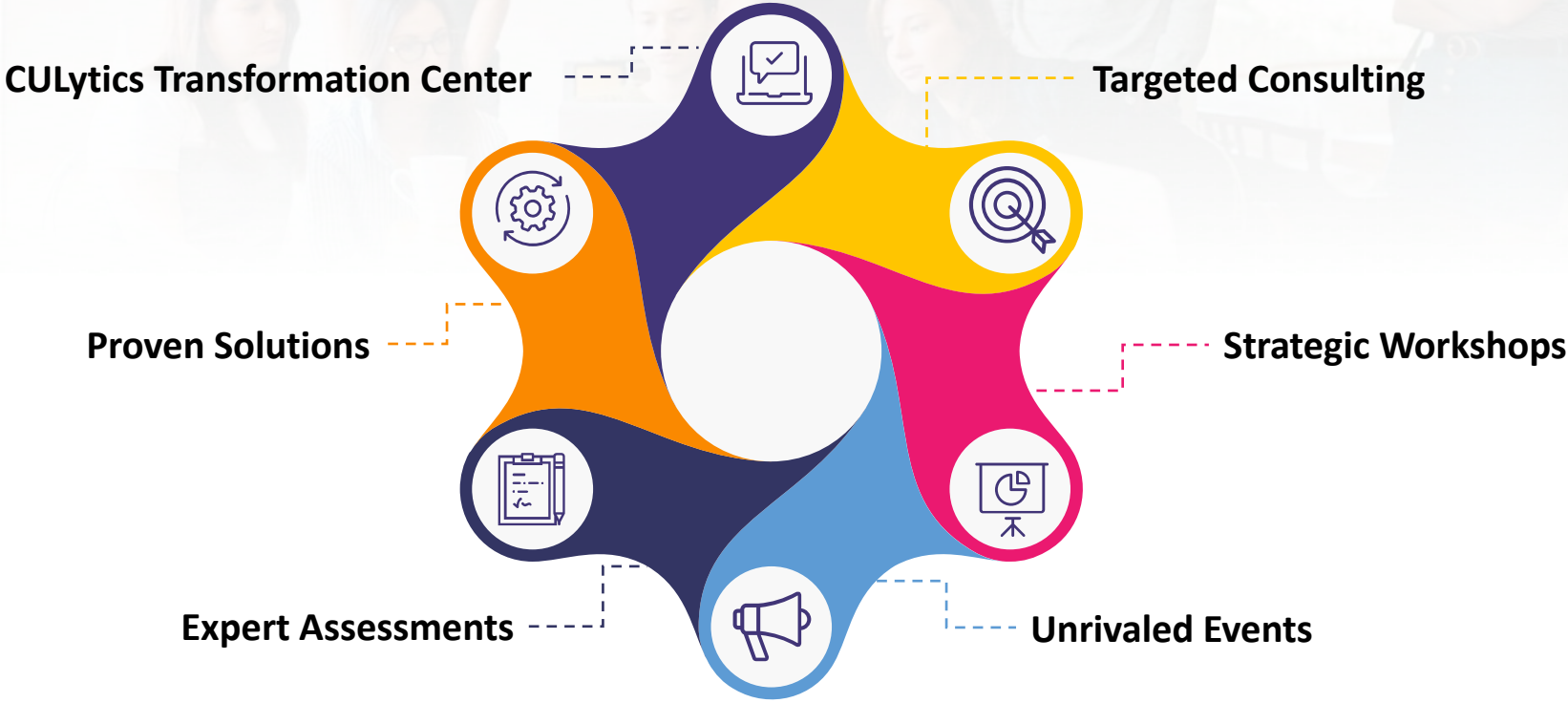
● <https://www.linkedin.com/in/naveenjain/>

Recent Speaking Engagements

- Faculty – Southwest CUNA Management School
- Cornerstone Growth and Engagement Conference
- CUNA Marketing and Business Development Conference
- CUNA CFO Council Webinar
- CO-OP THINK18
- 2020, 2019, 2018, 2017, 2016 CULytics Summit
- Cornerstone Credit Union Leadership Conference
- Chief Data Officer Forum
- Chief Analytics Officer Forum
- Global Big Data Conference
- FIMA West
- Tableau User Conference
- Alteryx User Conference
- Banker Summit



CULytics Offerings



2020 CULytics Summit @Microsoft, Redmond, WA

<https://events.culytics.com>

Now Live Streamed



40+ Speakers
Fintech Showcase
Transformation Challenge
Keynotes
Case Study Sessions
Networking

- No sales pitch – pure education
- Practical success stories across all functional areas
- Must Attend Event for Credit Union Leaders

Save on Registration –
Use “TUG10” to register

Customer Testimonial

“ This was a great opportunity to learn and hear from the greater CU community. ”

Data Services Director, \$11.7 B Credit Union, IL

“ Really enjoyed hearing from other CU's in their data analytics journey. ”

VP of Finance, \$2.7 B Credit Union, SC



Data Governance

Manage data better according to policies and best practices.

Why



Increase value from the data

Increase Revenue

Manage Costs

Drive Efficiencies



Reduce Risks

General Risk Management

Data Security

Privacy



Improving Processes

Regulatory Compliance

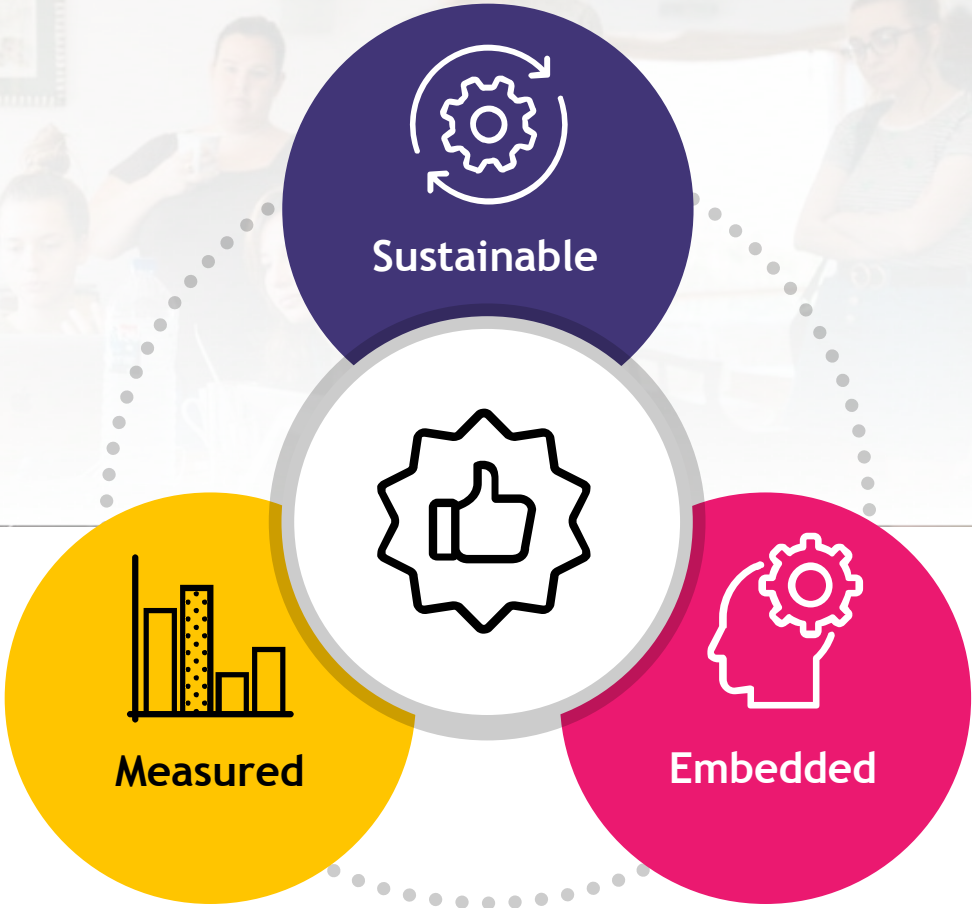
Business Process Efficiency

Data Quality Improvement

Vendor Management

Metadata Management

Successful Data Governance Program should be:



Data Governance Maturity Model?

<https://culytics.com/assessments>



	Stage 1 Ad-hoc	Stage 2 Basic	Stage 3 Managed	Stage 4 Optimized
Strategy	No alignment	Alignment at functional level	Alignment at Organization Level	Aligned and optimized
People	Power with individual analysts	Functional manager are data savvy	Exec functional managers are savvy	Entire organization is data analytics savvy
Process	Data not trusted	Conflicting functional views	Common data views for specific positions	Data seen as truth
Technology	Ad-hoc use of technology to manage data, quality, security and definitions	Planned use of technology to manage data, quality, security and definitions in some areas	Use of technology to manage data, quality, security and definitions in most areas	Technology used to optimize the effort to manage data, quality, security and definitions across the organization

Founding Principles

01

Leadership and Strategy

02

Business Driven

03

Shared Responsibility

04

Multi Layered

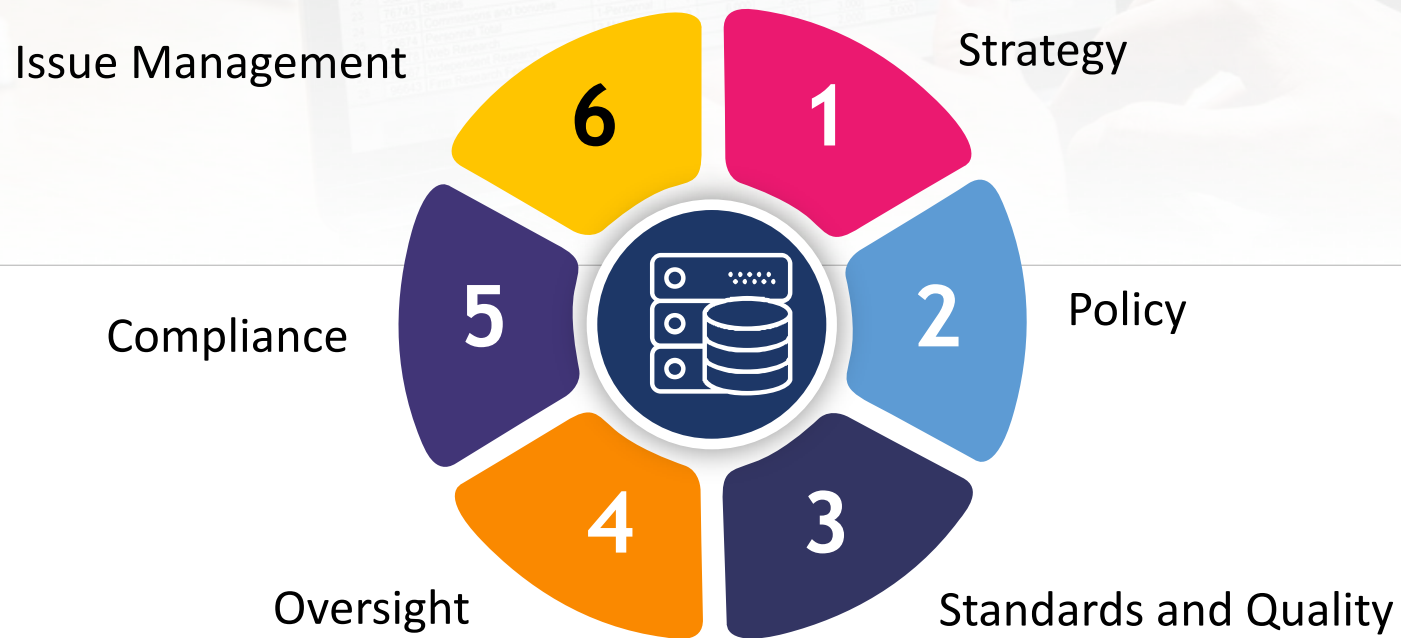
05

Framework Based

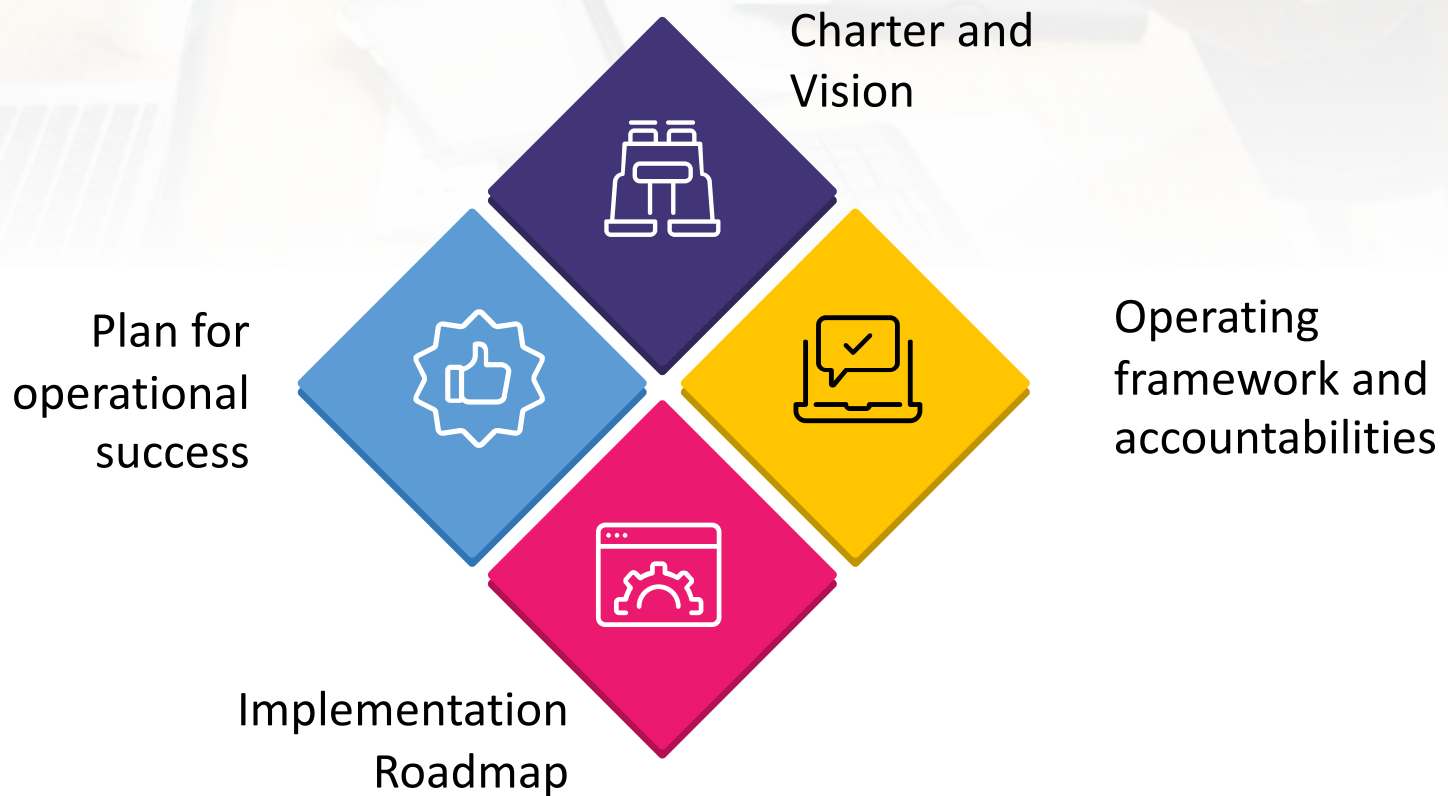
06

Principle Based

Scope of Data Governance



Strategy Components



Activities



Develop Policies
and Procedures



People Roles,
Responsibilities and
Alignment



Organizational
Change
Management

Organization



Artifacts



Data Quality
Issues Tracking



Reference Data
Management

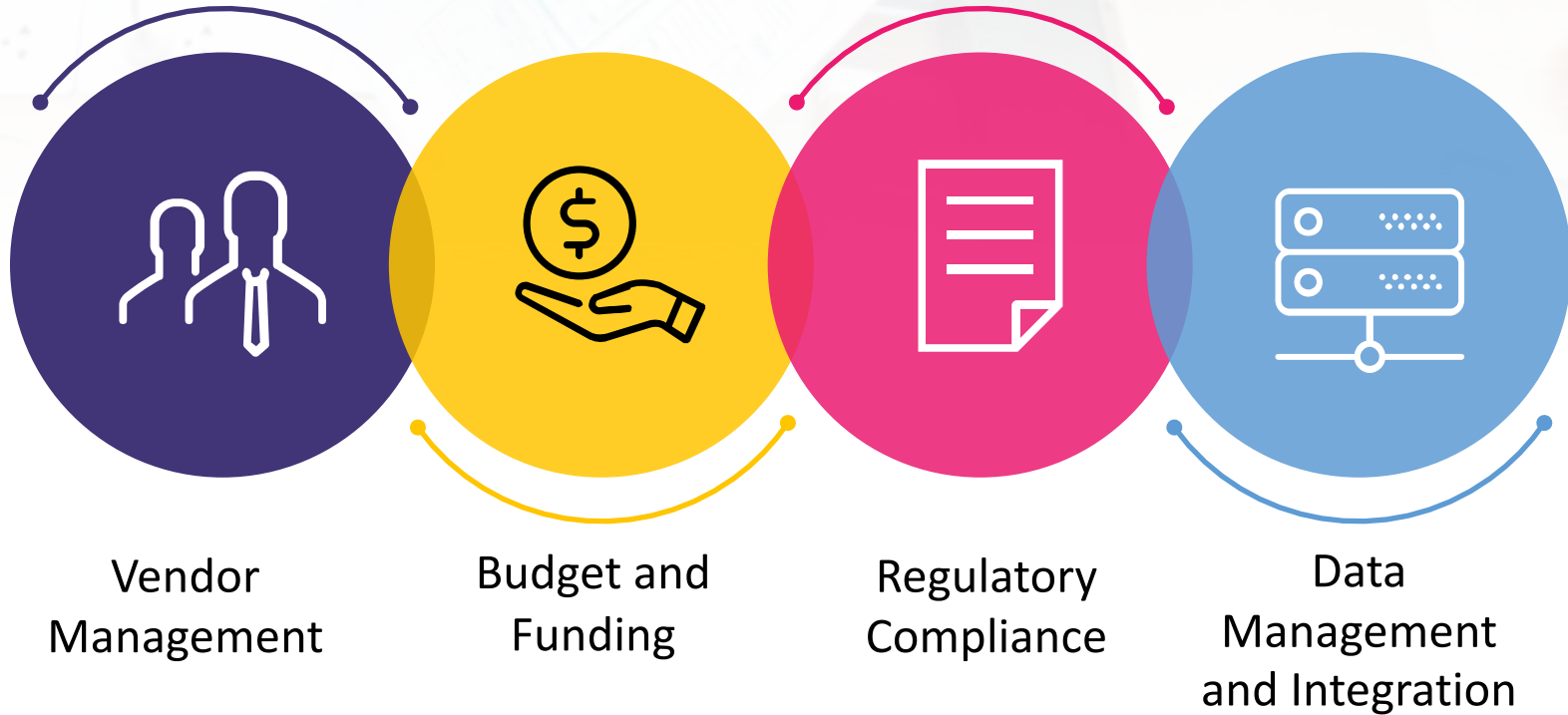


Data Source
Management



People Roles and
Responsibilities

Organizational Touchpoints



Introducing CULytics Data Governance App

Credit Union Collaborative Data Governance (<https://dg.culytics.com/>)



Highlights

Credit Union Community View

- Community Business Glossary
- Community Data Dictionary
- Community Data Sources
- Any Credit Union Team Member Can Join.
- Contribute Terms In “Draft” Status
- Selected Community Leaders Have “Admin” Rights To Approve And Manage The Terms

Your Credit Union View

- Your Credit Union Business Glossary
- Your Credit Union Data Dictionary
- Your Credit Union Data Sources – Manage Roles And Responsibilities
- Only Your Credit Union Team Members Can Join And Start Contributing Terms In “Draft” Status
- Only Your Credit Union Administrators Approve And Manage The Terms

Sign up Today !!!

What's Next?

- An Ask Me Anything with a BI leader and his team
- In-person User Group meet-up at the CULytics Summit
- Common Tableau & Power BI technical questions
- A dive into answers to the question:

“how do we make analytics contagious?”

Don't Miss An Update

Join the Analytics Community email list:

www.surveymonkey.com/r/cutug

Join the online communities:

<https://community.tableau.com/groups/credit-unions>

<https://www.pbusergroup.com/creditunions>