

Client Case Study: Data Governance Framework

DATA MANAGEMENT |
INFORMATION ASSET
MANAGEMENT | ASSET
CRITICALITY & SENSITIVITY
DATA LINEAGE | DATA
OWNERSHIP & STEWARDSHIP

The ask?



A global investment manager needed to establish a **fit-for-purpose data governance model** across their value chain to **meet client and regulatory expectations**.

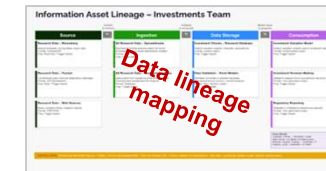
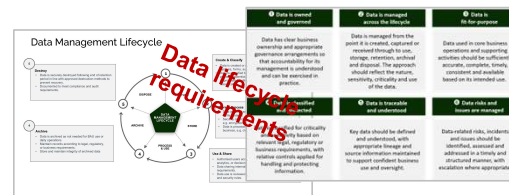
Starting from the base up, the ask was to assess the current state and leverage to set the requirements and design & build the tools and templates required to **show effective data governance across sensitive and critical information assets**.

The px Difference



Leveraging our lived experience building frameworks & policies and implementing these in complex matrixed we were able to quickly set the 'right' requirements for the organisation and build out the supporting tools and workshop collateral required for initial baseline implementation. The roadmap helped ensured the client's IT team understood the next steps and how to continue embedment of the framework across the organisation – additionally, the timelines for implementation factored in the business and technology strategy.

Below are some examples of our outputs to:



The so what?



The PX Partners team defined the organisation's data governance requirements and supporting roadmap for ongoing implementation following initial design and baselining. Key activities and outputs included:

- **Data Governance Framework** – data management lifecycle requirements, roles & responsibilities, oversight cadence, rating matrices, etc.
- **Information Asset Register** – build out of a complete inventory of data assets.
- **Data lineage mapping** - end-to-end mapping of critical data element flows
- **Data ownership & stewardship model** – defined RACI, escalation paths, and governance committee terms of reference

