Digital Transformation Meets Data Governance

How a Data Intelligence Platform helped American Family Insurance automate Data Governance
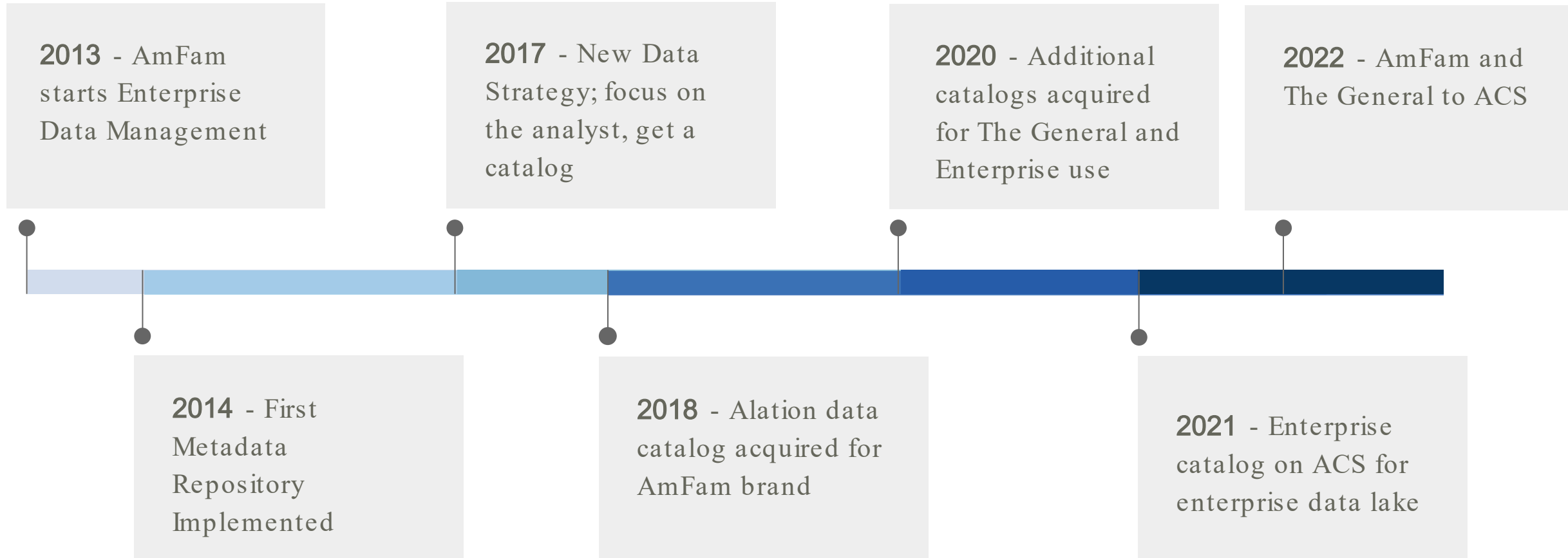
About American Family

- The nation's 13th-largest property/casualty insurance group
- Ranking No. 232 on the Fortune 500 list.
- The group sells American Family-brand products, primarily through exclusive agency owners in 19 states.
- Across multiple companies the group has more than 13,500 employees nationwide.

American Family Group of 14 companies:

1. American Family Mutual Insurance Company, S.I.
2. American Standard Insurance Company of Wisconsin
3. American Family Life Insurance Company
4. American Family Brokerage, Inc.
5. American Family Financial Services, Inc.
6. American Family Insurance Company
7. American Standard Insurance Company of Ohio
8. AmFam, Inc.
9. The AssureStart Insurance Agency, LLC (AssureStart)
10. Homesite Group Incorporated and its subsidiaries (Homesite)
11. The Main Street America Group
12. Midvale Indemnity Company
13. Midvale Life Insurance Company of New York
14. New Ventures, LLC
15. PGC Holdings Corp. and its subsidiaries (The General®)

AmFam and Alation Journey

2013 - AmFam starts Enterprise Data Management

2017 - New Data Strategy; focus on the analyst, get a catalog

2020 - Additional catalogs acquired for The General and Enterprise use

2022 - AmFam and The General to ACS

2014 - First Metadata Repository Implemented

2018 - Alation data catalog acquired for AmFam brand

2021 - Enterprise catalog on ACS for enterprise data lake

What is Digital Transformation?

From Salesforce*:

Digital transformation is:

- Using digital technologies to **create new** — **or modify existing** — **business processes, culture, and customer experiences** to meet changing business and market requirements.

- **Reimagining** business in the digital age

Digital transformation is <u>not</u>:

- Creating digital copies of formerly physical records or resources.

- Automating manual processes to complete tasks faster.

Digital transformation requires:

- Embracing data and technology in such a way that an entire way of interacting with others is completely transformed or invented.

*Salesforce, "What is Digital Transformation", https://www.salesforce.com/products/platform/what-is-digital-transformation/

Digital thinking affects change

- How do we share information? Email or Slack?

- How do we document our Standard work? Word documents or collaborative content management spaces?

- How do we share our insights and methodology around data so everyone can learn from it?

Communication about data and with data drives change.

Communicating about data matters

Sharing data requires more than just making it available for download or creating an API to access it.

Data is…
- Made up of digital information.
- Requires documentation for proper use.
- Used by stakeholders who may require support.
- Vital to those users' work.

Users require proof that data is…
- Monitored for quality.
- Delivered according to SLAs.
- Appropriate for use.

If users do not believe that data has been produced or documented with sufficient rigor, they will be less likely to rely on it.*

Everybody hates documentation

Why?

Documentation is…

- Considered an add-on task to data projects.
- Approached as a process artifact.
- Considered a static artifact and passive component of a data product.

Data cannot deliver value if you don't know what it represents.

Alation

Accelerating Data Intelligence

Sharing critical information about data drives innovation and business value.

- **Capturing** information at the point of creation embeds governance in the delivery lifecycle.
- **Activating** data product information supports data process automation.
- **Delivering** data information at the point of use supports faster, trusted, and higher value data insights.

Sharing critical information about data drives business value.

Governance Guiding Principles

- Focus on governance that delivers business value

- Centralize data policy information

- Provide enterprise metric definitions, queries, and sources

- Reduce the effort to share data insights and capture metadata

- Mine source code and documentation for content
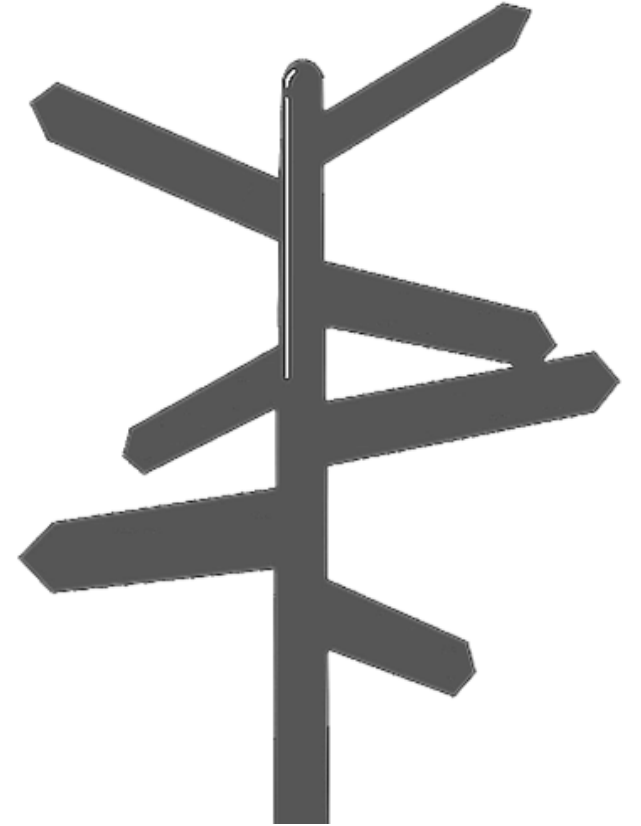
Connected Governance

Deliver Information
Provide trusted, curated data on demand.

Document Policies and Define Metrics
Provide consistency across policies and metrics

Empower Users
Reduce time and effort to curate data and share analytic insights.

The Data Intelligence Platform: Information is captured and organized for optimum use via human and automated channels.

Capture Information
Ingest metadata directly from original sources via automation

Activate and Monitor Policies
Establish consistent policies and monitor implementation

Create Value
Reduce time to value for data products and empower data users.

Automating Governance

People Standards

- Data engineering accountability
- Business SME cooperation
- Data science participation

Process Standards

- Standardized documentation
- Clearly defined responsibilities
- Buy-in at multiple levels
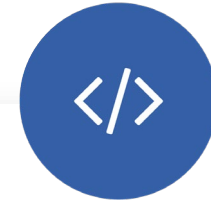
Technology Standards

- Support native work environments
- Foster self-service governance and engineering
- Build code-based services, easily deployed

AmFam Data Intelligence Platform

Shared Content:
- Curated data information
- Data usability guides
- Technical, operational, and business metadata
- Business glossaries
- Published queries
- Enterprise metrics
- Data Governance policies

Data User Guides

Enterprise Metrics

Data Lineage

Data Quality

Defect Information

Data Classification

Conversations and Announcements

Ad Hoc Reports

Curated Queries

Consistency in a Complex Ecosystem

Goal: Provide agile, consistent governance regardless of tech stack or data team

Metrics

- Approved Calculations
- Governed Definitions
- Data Sources

Models

- Model Cards
- Model Governance Policies
- Data Sources

Open APIs

Alation as the Platform

Open APIs

Data Access

- Role Definitions
- Access Restrictions
- Data Sharing Policies

Classification

- Access Restrictions
- Classification Policies
- Data Sources

Alation
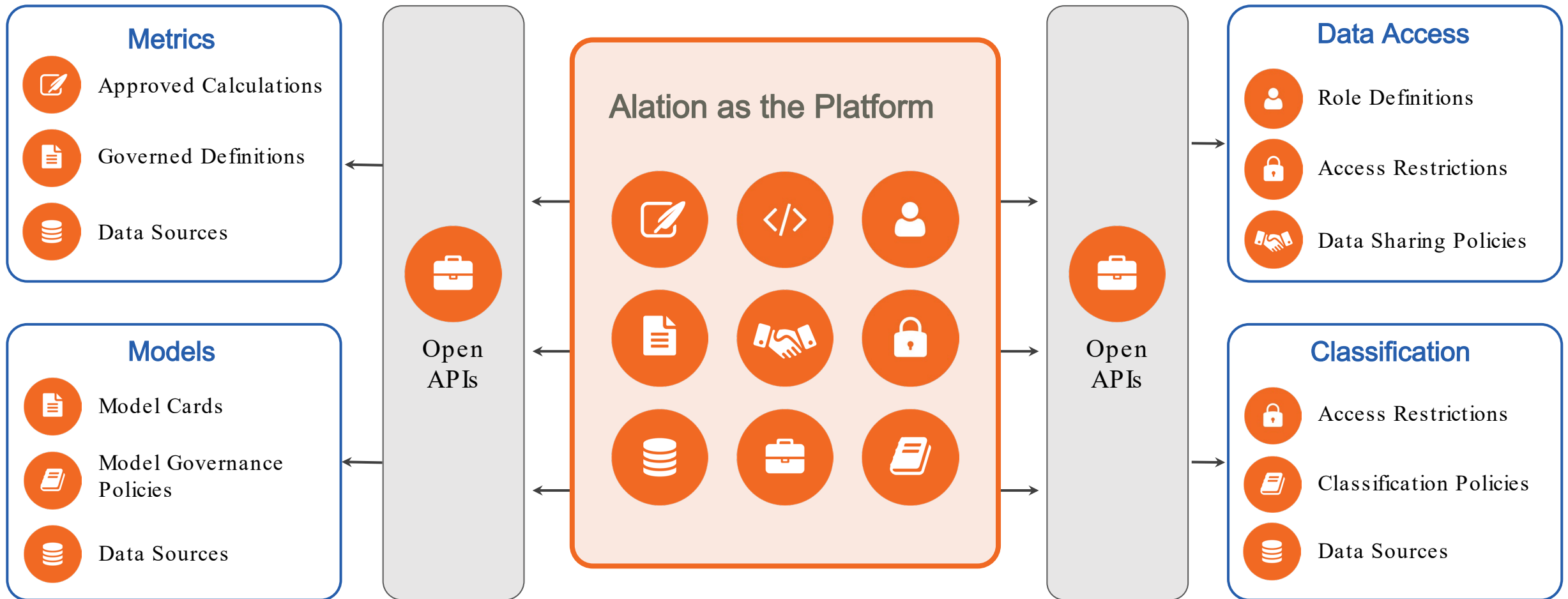
Connected Governance in Action

Data Product
Documentation

Business Metadata

Alation Platform

Metadata

- Governed Definitions
- Complete Metadata

Stewards and
Governance
Teams

Data Policies

- Classification Policies
- Quality Policies

Technical Metadata

Delivery
Pipeline and
automated
checks

Application Repository

Data Services (Classification, Quality, etc.)

- Ad Hoc Classification
- Privacy Tools
- Data Discovery
- Data Tokenization

- Security Controls
- API services
- Manual Classification
- Quality Monitoring

Data Sources

- Files Systems
- Analytic Data Sources
- Oper. Data Sources

Data Service Execution

Metadata
driven
security
architecture

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Data Monitoring with Services

Goal: Consolidate information about data from multiple sources

Data Product Adoption

Documented = Done

Data product docs support data enablement:

- Key business questions answered
- Query examples
- Best practice information
- Frequently asked questions
- Migration and source information
- Access guides
- Domain information

Data Literacy docs support data intelligence:

- Curated query forms
- Platform and BI tool user guides
- Data training information
- Business Function information

About Alation

Alation

Alation Facts & Figures

More than 25% of Fortune 100 companies are Alation customers

Alation by the Numbers

Enterprise Customers	Funding Raised	Employees
500+	$217M	800+

Category Creator

Founded in 2012

Foundational Technology

Leading Data Intelligence Platform

Growing Workforce & Top -Ranked Culture

- Headquartered in Redwood City, CA
- 5 offices around the world
- 3x Inc. Magazine's Best Workplaces

Industry Recognition

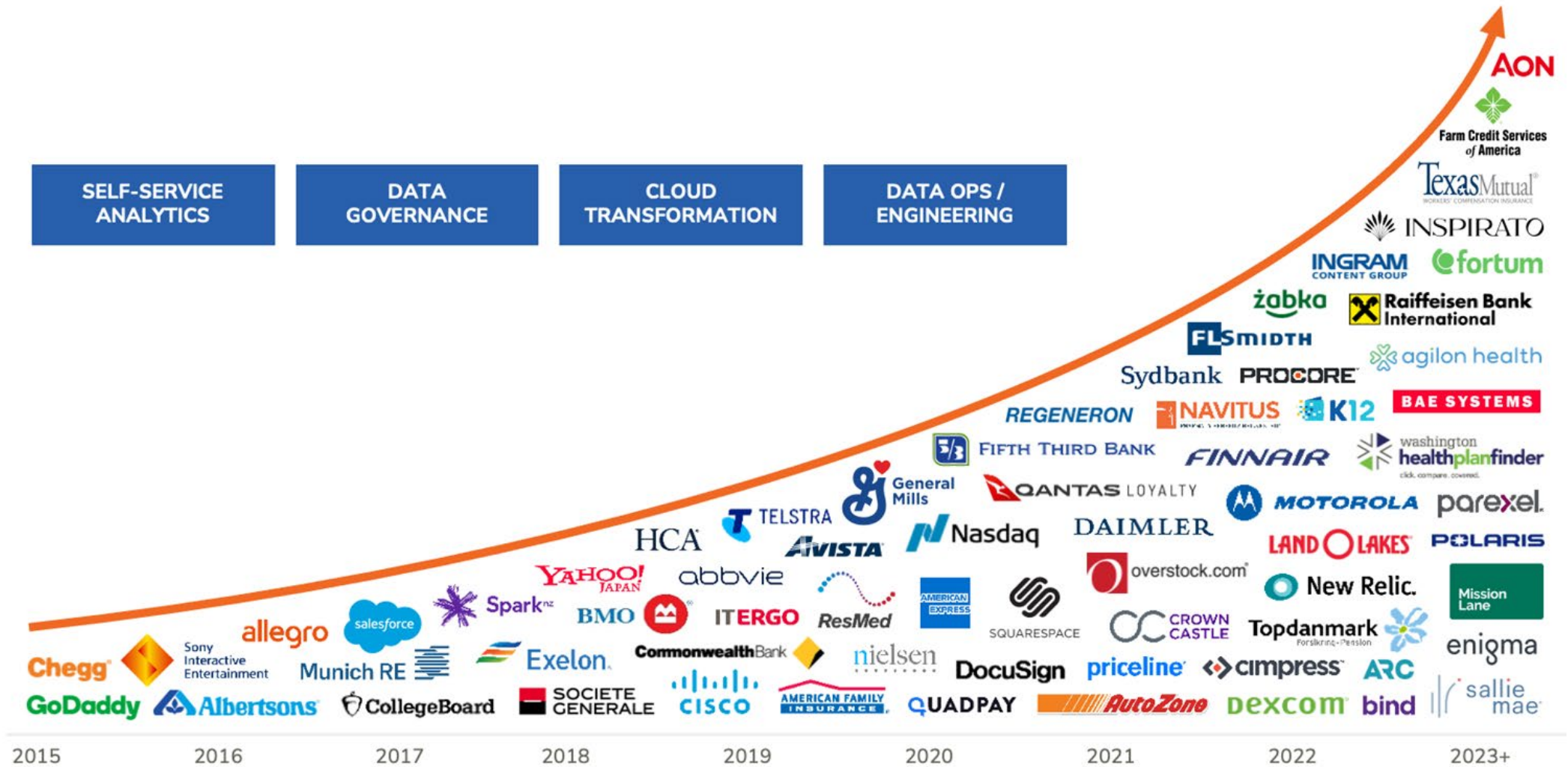Named a Leader by top industry analyst firms
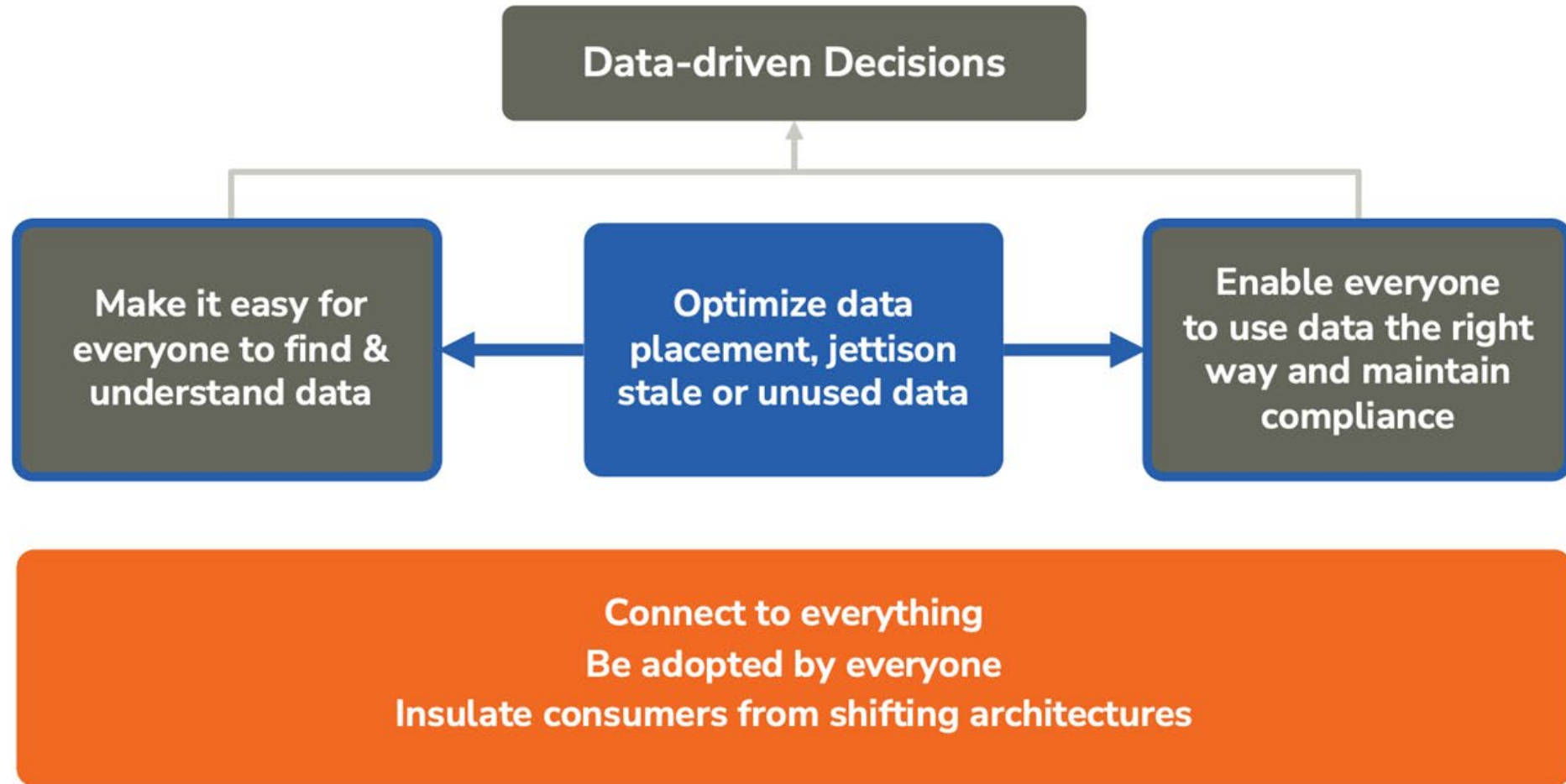
Gartner   FORRESTER
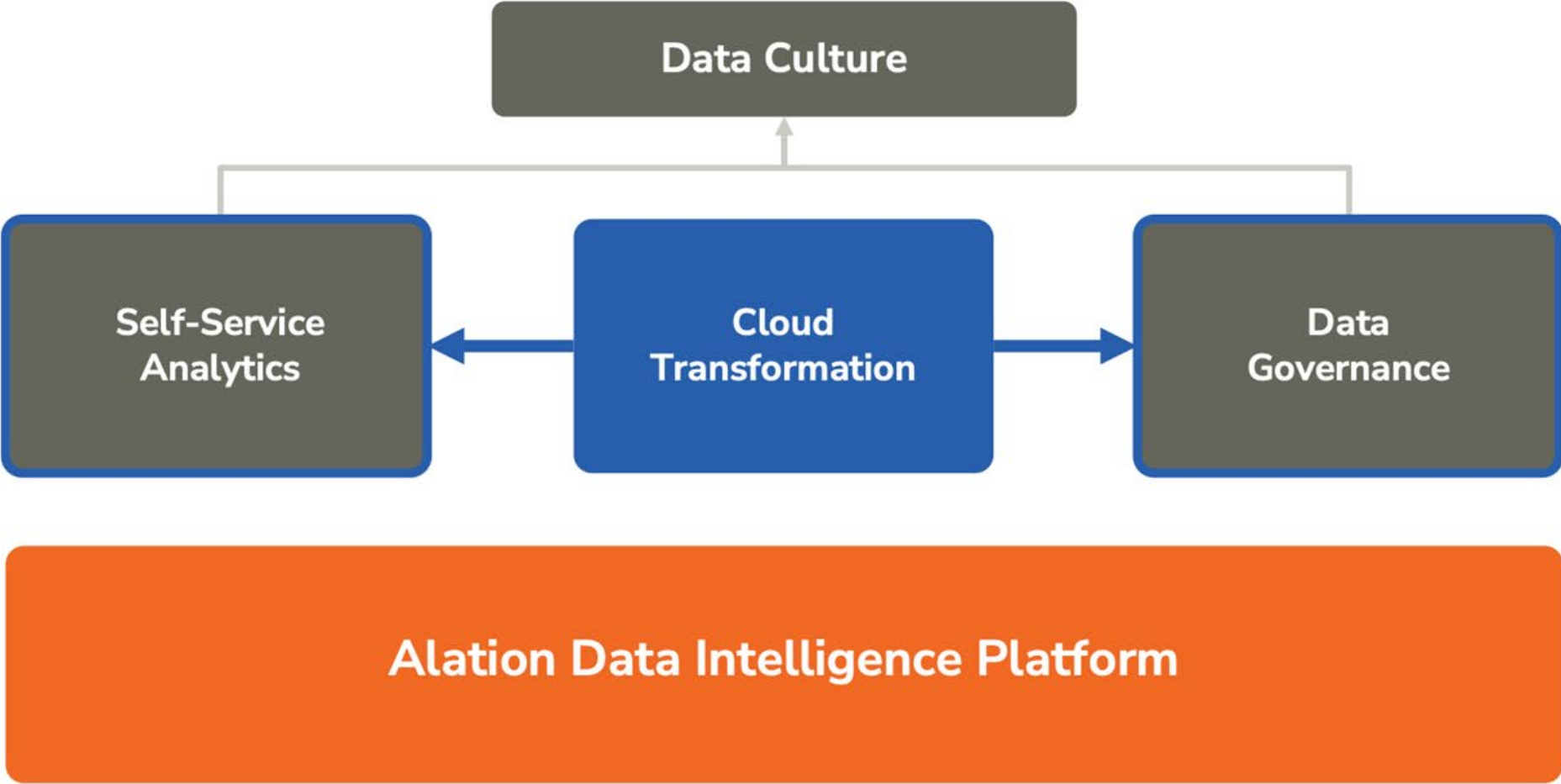
IDC   Dresner ADVISORY SERVICES

GIGAOM   BARC

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About Alation

The Enduring Blueprint for Driving Data Culture

Data-driven Decisions

Make it easy for everyone to find & understand data

Optimize data placement, jettison stale or unused data

Enable everyone to use data the right way and maintain compliance

Connect to everything
Be adopted by everyone
Insulate consumers from shifting architectures

Alation

The Enduring Blueprint for Driving Data Culture

Data Culture

Self-Service Analytics ← Cloud Transformation → Data Governance

Alation Data Intelligence Platform

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Questions?

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