

DATA GOVERNANCE · METHODOLOGY

Data Governance Engagement Approach

How I start a data governance mission and how I run it: four phases, two continuous streams, the people involved, a RACI and the deliverables of each phase, and a project structure ready for Jira and Confluence.



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1. Purpose and scope

This document answers two questions a client asks before a mission: **how do you start**, and **how do you run data governance**? I start by listening: in two to four weeks I map what exists. We then agree where to go, turn the roadmap into a programme with a project review board, and deliver the projects in short sprints followed in Jira and Confluence.

Training and coaching run all along the mission. Governance documents are written only where a gap calls for one, following DG-STD-002. The approach applies the DAMA-DMBOK2 data governance activities (chapter 3) and standard agile practice (Scrum Guide, Kanban).

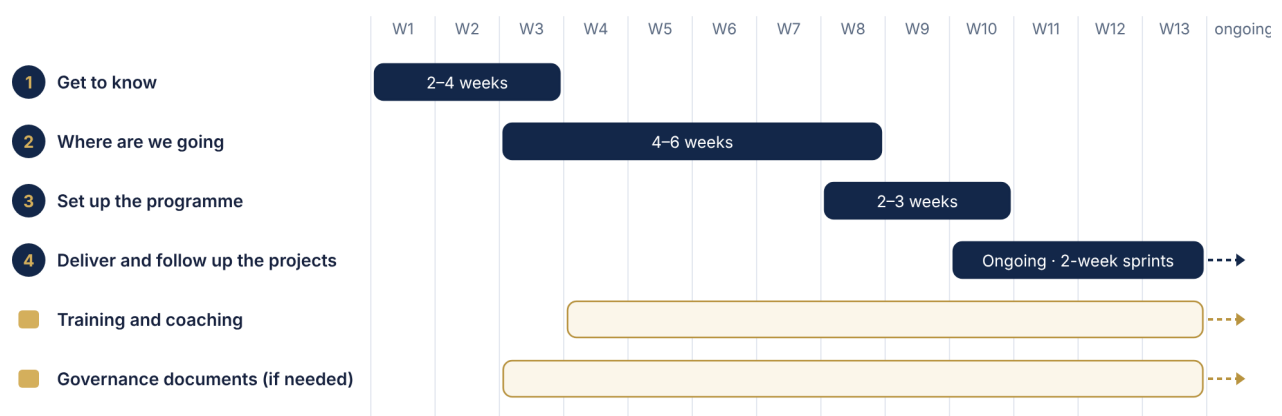
Principles

Principle	What it means in practice
Start from what exists	Reuse the documents, tools and roles already in place; fix the missing links.
Business first	Each action answers a business question carried by a use case and a data owner.
Small, visible steps	Two-week sprints with a report at each sprint; the PRB decides at each step.
Documents only when needed	Write a policy, standard or procedure when a gap calls for it, not by default.
Leave autonomy behind	Train and coach so that the teams keep the governance running after the mission.

2. Overview

A first mission of about three months covers phases 1 to 3 and the first sprints of phase 4. Durations are indicative for a mid-size organisation and one consultant; phases overlap on purpose.

A first mission of about three months covers phases 1 to 3 and the first sprints



Indicative durations for a mid-size organisation and one consultant; overlaps are deliberate.

Figure 1 – Engagement timeline: four phases and two continuous streams over the first 13 weeks.

Phase	Goal	Duration	Exit criterion
1. Get to know: as-is analysis	Understand how data is governed today, before changing anything.	2–4 weeks	The sponsor validates the as-is report and the list of priority documents.
2. Where are we going: gaps, use cases and roadmap	Assess eight dimensions, select priority domains and use cases, build the roadmap.	4–6 weeks	The sponsor and the council approve the roadmap and the priority use cases.
3. Set up the programme	Create the project review board, score and select the projects, start them.	2–3 weeks	The PRB has selected the first projects; each one has a charter, an owner and a backlog.
4. Deliver and follow up the projects	Run the projects in sprints, report at each sprint, adjust with the PRB.	Ongoing · 2-week sprints	The use cases are delivered and the client team runs the sprints and the PRB without the consultant.

3. Roles and participants

The RACI tables in sections 4 to 7 use the short labels below. Each activity has exactly one **A**.

RACI label	Role	Contribution
Cons.	Consultant (Olivier Bouchez)	Runs the analysis, facilitates the workshops, writes the deliverables, coaches the teams
Sponsor	Executive sponsor	Owns the mission, validates the scope and the roadmap, unlocks resources
DG Lead	Data Governance Lead	Day-to-day counterpart; will own the governance programme after the mission
Council	Data Governance Council / Project Review Board	Decides priorities, arbitrates between domains, approves policies and the portfolio
Owners	Data Owners	Accountable for a data domain; product owners of the domain use cases
Stewards	Data Stewards	Maintain definitions, quality rules and catalogue content day to day
IT / Sec	IT, data architecture and security (CISO)	Databases, access management, tools, security controls
DPO	Data Protection Officer, legal and compliance	GDPR, AI Act, contracts, ethics
PMO	PMO and project managers	Portfolio, planning, resources, Jira / Confluence administration

R = Responsible (does the work) · A = Accountable (one per activity) · C = Consulted · I = Informed

4. Phase 1 – Get to know: as-is analysis

Duration: 2–4 weeks. Build a shared, documented picture of the current governance: documents, applications, legal frame, actors, sources, consumers and the way projects are decided. The checklist of reference documents shows the missing links.

Participants

- Sponsor
- Data Governance Lead
- Council members (if any)
- Data Owners and Data Stewards
- IT / data architects / CISO
- DPO and legal
- PMO and project managers
- Main data consumers

Key questions

Governance and documents

- Which governance documents exist (policy, standards, guidelines, procedures)? Where are they, who owns them, are they up to date?
- Is there a data governance council, a governance lead, data owners and data stewards? Are the roles written down?

Legal and ethics

- Which laws and regulations frame the company's data (GDPR, AI Act, sector rules, NIS2)?
- How does the company position itself on data ethics, and how is that written into the governance?
- Is personal data classified for GDPR, and how does the governance apply GDPR (records of processing, DPIA, retention)?

Catalogue and architecture

- How is the data catalogue structured (domains, terms, hierarchy)? Which tool is used?
- How is the catalogue mapped to the physical structures (databases, tables, columns)?
- What are the main sources? How are contracts with external sources managed?

Security and access

- How is data secured? Who has access, and how are access rights requested, granted and reviewed?

Consumers and requests

- Who are the main data consumers? How do they ask for data, report a bug or request an improvement? Is there a ticketing system?

Projects and decisions

- How are projects managed? Who decides which projects start, and when?

- What is the current roadmap? Who are the project managers? Is there a project review board (PRB)?

Deliverables

Code	Deliverable	Content
D1.1	Documentation inventory	Existing documents and applications, with links, owners and contact persons.
D1.2	Stakeholder map	Governance actors, sources and consumers, with their role and how they interact.
D1.3	Gap checklist	Reference document checklist (section 9) filled in: present, partial or missing.
D1.4	Initial recommendation	Findings, risks and the priority documents to create for the mission.

RACI

Activity	Cons.	Sponsor	DG Lead	Council	Owners	Stewards	IT / Sec	DPO	PMO
Kick-off: scope, contacts, calendar	R	A	C	–	–	–	–	–	I
Collect existing documents and applications	A/R	–	C	–	–	C	C	C	C
Interview the governance actors	A/R	C	C	C	C	C	C	C	C
Map sources, consumers, request and ticketing channels	R	–	A	–	–	C	C	–	C
Fill in the reference document checklist	A/R	–	C	–	–	C	–	–	–
Present findings and initial recommendation	R	A	C	I	I	I	I	I	I

EXIT CRITERION

The sponsor validates the as-is report and the list of priority documents.

5. Phase 2 – Where are we going: gaps, use cases and roadmap

Duration: 4–6 weeks. Measure the gaps against a target governance framework on eight dimensions, choose the priority domains, describe concrete use cases and agree a data governance roadmap with the sponsor and the council.

Participants

- Data Governance Lead
- Council
- Data Owners of the candidate domains
- Data Stewards
- IT, architecture and security
- DPO and legal
- PMO

Eight dimensions assessed

Dimension	Key questions	Output
Governance framework	<ul style="list-style-type: none"> • Is the framework clear, understood and followed? • Is the organisation structured? What are the gaps? • Which documents exist: policy, standard, guideline, procedure? • What is the draft – review – approve – publish flow, and which software supports it? 	Gaps; target framework and operating model
Data catalogue	<ul style="list-style-type: none"> • What are the domains? What are the terms and their hierarchy? • Who creates domains and terms, with which flow? • Which software is used? 	Gaps; priority domains; catalogue use case
Data quality	<ul style="list-style-type: none"> • How is quality defined and measured? • Are there quality standards? Who defines them, with which process? • How are bugs and quality incidents reported? 	Gaps; priority domains; quality use case
Data projects	<ul style="list-style-type: none"> • How are projects managed (agile method)? • What is the current roadmap, how and when is it defined? • Who decides the priorities, and how? 	Project structure for phase 3
Legal and ethics	<ul style="list-style-type: none"> • Which legal constraints apply? Are the controls in place? • What is missing? Who decides? 	Gaps and risks; priority use case
Security	<ul style="list-style-type: none"> • How is physical security managed, and by whom? • How are data access rights defined, and by whom? • How is data classified, and by whom? 	Gaps and risks; priority use case
Data architecture	<ul style="list-style-type: none"> • Which databases exist, and who manages them? • Who has access? Who manages the table structures? • How are the physical structures linked to the semantic layer (catalogue)? 	Gaps; lineage and mapping needs
People	<ul style="list-style-type: none"> • Who are the data owners and data managers? Do they have a job description? • What are their training and coaching needs? 	Training and coaching plan

For each dimension, the gaps are scored (absent, partial, in place) and the risks added to the risk register. The priority domains come from the overlap of the biggest gaps and the highest business value.

Deliverables

Code	Deliverable	Content
D2.1	Gap assessment	Maturity and gaps per dimension, with evidence from phase 1.
D2.2	Risk register	Legal, ethical and security risks, with owner and proposed treatment.
D2.3	Priority domains and use cases	One use case card per priority (business question, data, owner, value, risk, KPI).
D2.4	Data governance roadmap	Target framework and a 12 to 18-month roadmap, by quarter.
D2.5	Roadmap decision	Presentation to the sponsor and the council; go decision for phase 3.

RACI

Activity	Cons.	Sponsor	DG Lead	Council	Owners	Stewards	IT / Sec	DPO	PMO
Assess framework and organisation	R	–	A	C	C	–	–	–	–
Assess catalogue, quality and architecture	R	–	A	–	C	C	C	–	–
Assess legal, ethics and security; build the risk register	R	–	A	I	–	–	C	C	–
Assess projects and people	R	–	A	–	C	C	–	–	C
Select priority domains and write the use cases	R	–	R	A	C	C	–	–	–
Build the roadmap and target framework	R	C	A	C	–	–	–	–	C
Approve the roadmap	C	A	R	R	–	–	–	–	I

EXIT CRITERION

The sponsor and the council approve the roadmap and the priority use cases.

6. Phase 3 – Set up the programme

Duration: 2–3 weeks. Turn the roadmap into a managed programme: a project review board that decides, a scored portfolio, resources, and the first projects started with a clear operating mode in Jira and Confluence.

Participants

- Sponsor
- Council / PRB members
- Data Governance Lead
- PMO and project managers
- Data Owners of the selected domains
- IT

Steps

1. Create or organise the project review board (PRB): members, cadence, decision criteria.
2. Identify the projects with their cost and expected return.
3. Score and prioritise the projects (value, urgency, risk reduction, effort).
4. Identify the resources per project.
5. Select the projects to start (go / no-go).
6. Start the projects: Jira and Confluence structure, operating mode, deliverables, kick-off.

Deliverables

Code	Deliverable	Content
D3.1	PRB charter	Members, cadence, decision criteria, escalation path.
D3.2	Scored portfolio	Projects with cost, benefit and priority score.
D3.3	Resource plan	People and budget per selected project.
D3.4	Project charters	Scope, owner, deliverables, milestones for each selected project.
D3.5	Operating mode	Jira project, Confluence space, workflow, templates and ceremonies.

RACI

Activity	Cons.	Sponsor	DG Lead	Council	Owners	Stewards	IT / Sec	DPO	PMO
Create the PRB: charter, members, cadence	R	A	–	C	–	–	–	–	C
Identify projects with cost and benefit	R	–	A	–	C	–	C	–	R
Score and prioritise the projects	R	–	–	A	C	–	–	–	C
Identify resources	–	A	–	–	C	–	C	–	R
Select the projects to start	C	I	C	A/R	–	–	–	–	C

Activity	Cons.	Sponsor	DG Lead	Council	Owners	Stewards	IT / Sec	DPO	PMO
Set up Jira / Confluence and kick off the projects	R	–	C	–	–	–	C	–	A

EXIT CRITERION

The PRB has selected the first projects; each one has a charter, an owner and a backlog.

7. Phase 4 – Deliver and follow up the projects

Duration: Ongoing · 2-week sprints. Deliver the use cases in short iterations, with written specifications, visible progress and regular decisions by the PRB, until the client teams run the governance on their own.

Participants

- Data Owners (product owners)
- Data Stewards
- IT and data engineers
- PMO / Scrum master
- Data Governance Lead
- PRB (monthly)

Steps

1. Write the backlog and the specifications (user stories, acceptance criteria, Definition of Ready and Done).
2. Run the sprints in Scrum (2 weeks) or follow the flow in Kanban, depending on the team.
3. Report at the start and the end of each sprint: goal, delivered, blocked, next.
4. Report monthly to the PRB: progress, KPIs, risks, decisions needed.
5. Handle change requests and re-prioritise with the PRB.
6. Close with lessons learned and a handover to the client teams.

Deliverables

Code	Deliverable	Content
D4.1	Backlog and specifications	User stories with acceptance criteria; Definition of Ready and Done.
D4.2	Sprint plans and reviews	Sprint goal, scope and demo of what was delivered.
D4.3	Sprint reports	One page at the start and end of each sprint.
D4.4	Monthly PRB report	Progress, KPIs, risks and decisions requested.

Code	Deliverable	Content
D4.5	Lessons learned and handover	What worked, what to keep, who owns what next.

RACI

Activity	Cons.	Sponsor	DG Lead	Council	Owners	Stewards	IT / Sec	DPO	PMO
Write backlog and specifications	R	–	–	–	A	C	C	–	–
Plan and run the sprints	R	–	–	–	–	R	R	–	A
Sprint review and report	R	–	I	–	C	–	–	–	A
Monthly report to the PRB	R	I	C	I	–	–	–	–	A
Change requests and re-prioritisation	C	–	–	A	C	–	–	–	R
Lessons learned and handover	R	–	A	I	I	I	–	–	I

EXIT CRITERION

The use cases are delivered and the client team runs the sprints and the PRB without the consultant.

8. Continuous streams

A. Training and coaching

When: From phase 2, all along the mission. Make the roles work: train, coach, and pass on the know-how.

- Training plan per role, built from the "People" dimension of phase 2.
- Sessions: governance basics, Data Owner and Data Steward roles, the catalogue tool, data quality rules, GDPR and AI Act awareness.
- One-to-one coaching of data owners, stewards and the governance lead.
- Train-the-trainer so that the client teams can onboard newcomers.

Deliverables: Training plan · Training material · Attendance and adoption KPIs

B. Governance documents (if needed)

When: When phases 1 and 2 show a missing document. Write only the documents the gaps call for, with a clear approval flow.

- Order: policy first, then the priority standards, then the procedures and guidelines.
- Each document follows the draft – review – approve – publish flow of DG-STD-002.

- Written from ready-made templates (standard, procedure) and existing examples (data dictionary standard DG-STD-001, document management standard DG-STD-002).

Deliverables: Approved documents · Document register · Publication in the repository

9. Reference document checklist

Used in phase 1 to find the missing links (deliverable D1.3). For each document, note whether it is present, partial or missing, and where it is kept.

Theme	Document	Type	Content	Priority	Status
Framework	Data Governance Policy	Policy	Principles, scope, accountability	High	
Framework	Governance charter / operating model	Policy	Bodies, roles, decision rights, council terms of reference	High	
Framework	Data governance roadmap	Plan	Priorities by quarter	High	
Organisation	Roles and responsibilities (RACI)	Standard	Owner, steward, lead, council, IT, DPO	High	
Organisation	Job descriptions: Data Owner, Data Steward	Guideline	Tasks, time, skills	Medium	
Organisation	Domain ownership register	Register	One owner per domain	High	
Catalogue	Data dictionary / business glossary standard	Standard	e.g. DG-STD-001	High	
Catalogue	Metadata and naming standard	Standard	Naming, definitions, modelling conventions	Medium	
Catalogue	Reference and master data standard	Standard	Code lists, golden records	Medium	
Quality	Data quality standard	Standard	Dimensions, thresholds, measurement	High	
Quality	Data quality issue procedure	Procedure	Report, triage, fix, close	High	
Quality	Data quality rule library and dashboard	Register	Rules, results, trends	Medium	
Legal & ethics	Records of processing activities (GDPR art. 30)	Register	Kept by the DPO	High	
Legal & ethics	DPIA procedure	Procedure	When and how to assess high-risk processing	Medium	
Legal & ethics	Data ethics and AI use guideline	Guideline	AI Act, acceptable use	Medium	
Legal & ethics	External data contracts register	Register	Sources, licences, DPAs, expiry	Medium	
Security	Data classification standard	Standard	Confidentiality levels, personal data	High	
Security	Access request and review procedure	Procedure	Request, approve, review, revoke	High	

Theme	Document	Type	Content	Priority	Status
Security	Retention and deletion standard	Standard	Retention periods, deletion proof	Medium	
Documents	Document management standard	Standard	e.g. DG-STD-002	High	
Projects	PRB charter and decision log	Charter	Members, criteria, decisions	High	
Projects	Project charter and sprint report templates	Template	One per project / sprint	Medium	
Projects	Change request and exception procedure	Procedure	Who decides, how it is recorded	Medium	

Status: P = present, PA = partial, M = missing. Add the link and the contact person in the inventory (D1.1).

10. Use case card and prioritisation

Use case card

Each priority use case of phase 2 (D2.3) is written on one card:

Field	Content
Name	Short name, e.g. "Single customer address"
Business question	The decision or process the data must support
Domain and Data Owner	Accountable domain and person
Data and sources	Systems, tables, external sources
Current problem	Gap or risk found in phase 2
Expected value	Benefit, users, savings, compliance
Risk if nothing is done	Legal, operational, reputational
Effort and prerequisites	People, tools, documents needed
Success KPIs	How success will be measured
Priority score	Value + urgency + risk reduction, divided by effort

Priority score

In phase 3 the PRB scores each project from 1 to 5 on four criteria, inspired by the Weighted Shortest Job First method (SAFe):

$$\text{Priority score} = (\text{Business value} + \text{Time criticality} + \text{Risk reduction}) \div \text{Effort}$$

Score	Business value	Time criticality	Risk reduction	Effort
1	Nice to have	No deadline	No risk addressed	Under 2 weeks
3	Clear benefit for one domain	Needed this year	Reduces a known risk	1 to 2 months

Score	Business value	Time criticality	Risk reduction	Effort
5	Critical for several domains	Legal or business deadline	Removes a legal or major risk	More than 3 months

11. Project follow-up in Jira and Confluence

A generic project structure is imported into the client's tools at the start of phase 3. The import kit contains a Jira CSV file and a script that creates the Confluence page tree.

Jira structure

Level	Content	Example
Epic	One per phase and per stream (6 epics)	P2 – Where are we going: gaps, use cases and roadmap
Story	One per deliverable or main activity	D2.3 – Priority domains and use cases
Sub-task	Concrete steps of a story	Write the use case card for the Customer domain
Labels	Phase, stream and dimension	phase-2, quality, legal-ethics

Workflow: To Do → In Progress → In Review → Done, with Blocked as a side status.

Ceremonies

Ceremony	When	Output
Sprint planning	Start of sprint, 1–2 h	Sprint goal and scope
Daily stand-up	15 min (Scrum) or board review (Kanban)	Blockers
Sprint review	End of sprint, 1 h	Demo and acceptance
Retrospective	End of sprint, 45 min	Improvement actions
PRB	Monthly, 1 h	Progress, KPIs, decisions

Sprint report (start and end of sprint)

- Sprint goal and dates
- Planned stories and owners
- Delivered (with link to the Jira filter)
- Blocked items and help needed
- KPIs: velocity or throughput, quality incidents
- Decisions needed from the PRB
- Next sprint goal

Confluence space

Page	Content
Home – Data Governance Programme	Mission charter, contacts, links to Jira board and roadmap
Phase 1 to Phase 4	Goal, participants, checklist, deliverables, RACI, exit criterion
Streams A and B	Training plan, coaching log, document register
Templates	Use case card, sprint report, PRB minutes, decision log, document inventory, gap register, risk register, lessons learned
Decision log	Date, decision, owner, rationale

12. How I start: the first 10 days

When	What happens
Day 1	Kick-off with the sponsor and the governance lead: scope, contacts, calendar, access to documents.
Days 2–5	Collect documents and applications; first interviews (governance lead, DPO, IT, PMO).
Days 6–9	Interviews of data owners, stewards and main consumers; fill in the reference checklist.
Day 10	First feedback to the sponsor: what exists, what is missing, what to tackle first.

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LET'S TALK DATA

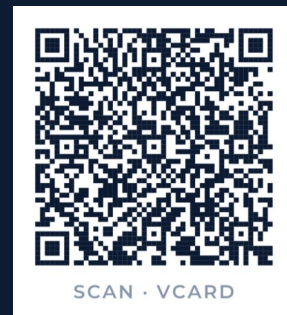
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