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## ***Integrating Information Management into IT Planning MIT Information Quality Symposium – July 2010***

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# Objectives

**Objective:** Establish *information management* planning (and solutioning) function within IT that would complement current functions, and provide focus on the improvement of information quality in support of better business decisions

## Objectives

- ✓ Develop partnerships across the firm, understand the business priorities, business roadmaps, anticipated outcomes and;
  - Improve information quality
  - Improve Straight Through Processing and reduce errors
  - Simplify access and accelerate delivery of information
  - Enhance business capabilities and operational efficiencies
  - Increase business intelligence & decision support capabilities

*support*

## Principles

- ✓ Leverage proven and emerging information strategies to:
  - Capture, enrich and organize data where it is originated
  - Manage information the way you would a financial asset
  - Distribute information with quality controls
- ✓ Simplify information management with cross-business integration and rationalization



**\*Management of Information** includes the interchange of people, process and technology to support how information is managed to support business, compliance and reporting responsibilities from the point of creation and capture to use and storage and ultimately to it's disposal

# ***IM Planning Function: Scope***

## **IT INCLUDES:**

- ✓ Lead development of data and information related Roadmaps and other strategic perspectives in collaboration with business and other partners
- ✓ Lead all Planning for all initiatives that are data and information driven
- ✓ Support all Planning IM related planning activity for all initiatives that are capability driven
- ✓ Guide all pre-SDLC projects through Information Management Reviews and all other governance checks
- ✓ Support strategies in relation to the Shared Information Assets (SIA) in conjunction with Business and IT
- ✓ Provide leadership and expertise related to BI;  
>>Demonstrate business value

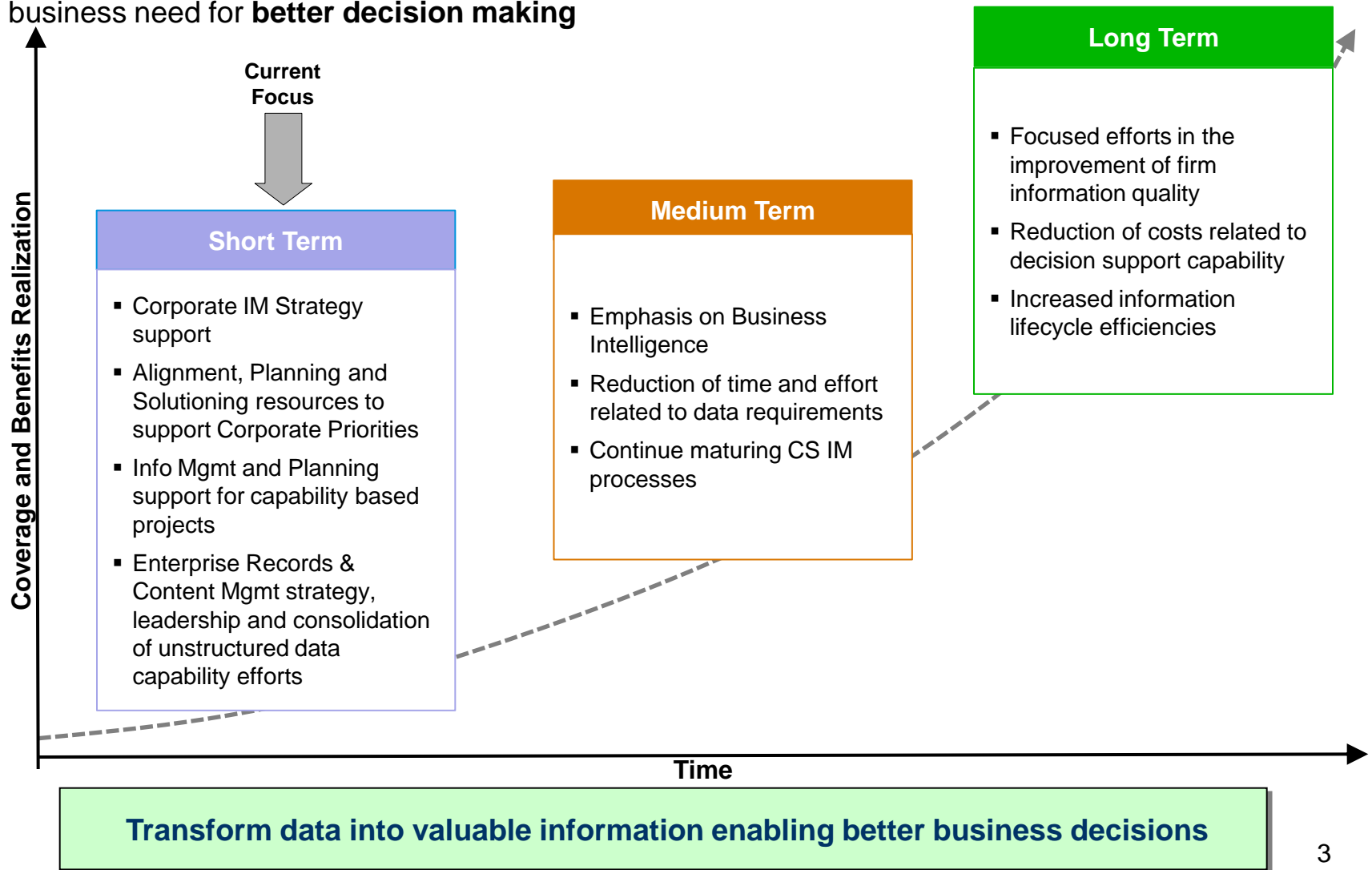
## **IT DOES NOT INCLUDE:**

- ✓ Data and other related development tasks including ETL, Business Intelligence, etc.
- ✓ Enterprise data governance functions and the data quality decisions
- ✓ Project Execution and Delivery
- ✓ Information Management Policy & Procedure ownership, development and maintenance

***Information Management* focused function within a Planning organization supplements current activities and provides relevant subject matter expertise**

# Approach

- **Immediate Benefits** would quickly position organization to support Corporate Priorities by providing greater emphasis on Information Management
- **Longer term Benefits** include increasing efficiencies, reducing costs and positioning IT to support the business need for **better decision making**



# Roles & Responsibilities

- ✓ Lead development of information management related Roadmaps and other strategic perspectives in collaboration with business and other partners in accordance with proven and emerging best practices
- ✓ Lead Planning activities for all initiatives that are information management driven
- ✓ Support project activities for information management related planning activity for all initiatives that are capability driven
- ✓ Guide all pre-SDLC projects through Information Management and other governance reviews
- ✓ Provide leadership to business and facilitate Business Intelligence (BI) projects to quickly demonstrate business value
- ✓ Assist with existing internal and external oversight organizations including Audit and Regulatory organizations

		Business Areas	Information Technology						
			CSIM (Information Management)	CSRM (Relationship Management)	CSRA (Requirements Acceptance)	Enterprise Architecture	Delivery Services	Technology Services	
<b>Activities</b>									
Phase 0 CONCEPT	Scoped	Develop initiative information strategies	C	A, R	C	I	C	C	C
		Define initiative information plan with alternatives	C	A, R	C	I	C	C	C
		Develop conceptual business case	I	C	A, R	I	I	I	I
Phase 1 PLANNING	Defined, Analyzed, Finalized	Solution information architecture	I	A, R	I	C	C	C	C
		Define detailed business information requirements	A	R	I	I	I	I	I
		Finalize information management approach	I	A, R	I	I	I	I	I
		Develop detailed business case and initiative plan	I	C	A, R	I	I	I	I
		Perform business process & data controls impact assessment	A	C	I	C	C	I	I
		Define application information interfaces	I	A, R	I	C	C	C	C
Phase 2 EXECUTION	Accepted	Complete information requirements	C	C	I	A	I	R	C
		Finalized information solution design	C	C	I	I	I	A	C
		Solution documentation	C	I	I	I	A, R	C	
		Design & development	I	C	I	I	A, R	C	
		Testing & Review	I	C	I	I	A, R	C	
Information Management		Data Governance Adherence - Policy & Standards	A, R	C	I	I	I	I	I
		"Data" Engagement Model (Legal Location)	I	A, R	C	C	C	C	C
		Stewardship of shared repositories	I	R	I	I	I	I	A
		Records and Content Management	A	R	I	I	I	I	I
		Reference Data Services	I	R	I	I	I	I	A
		Data Corrections	R	I	I	I	A	C	
		EOD Adoption	A	A, R	C	I	I	I	I
		Stewardship Information Management Industry Best Practices	I	A, R	I	I	I	I	I
	Business Intelligence & decision support capabilities	I	R	I	I	C	A	C	

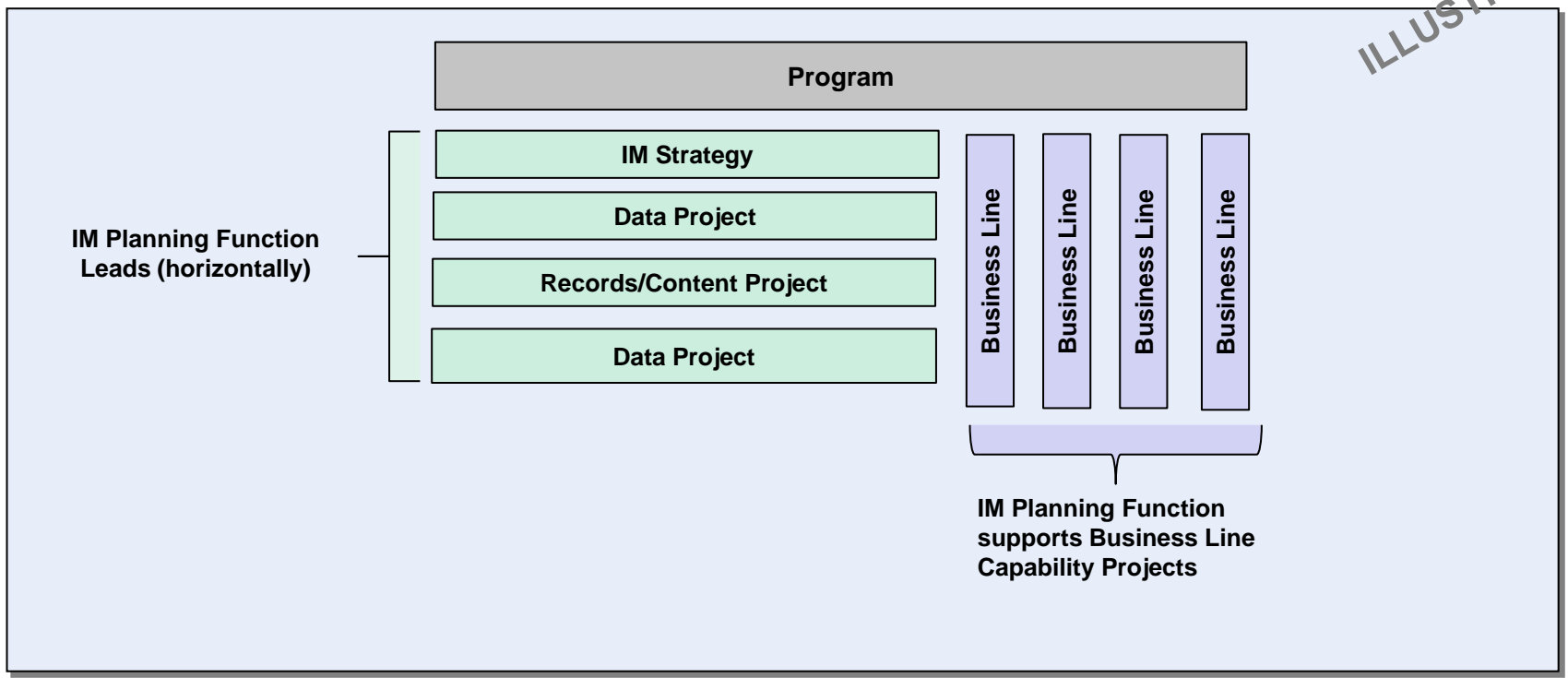
\* CSIM will provide consulting services to DS teams to prepare for data related merge processes supporting the SDR and DDR phase gates.  
 CSIM supports the IT delivery framework "plan" and "build" components by providing business and IT data expertise during planning, business case development, solutioning, governance, best practices and delivery.

**Organization expertise earlier in the process results in more consistent Information Management requirements, improved solutioning and ultimately more progress towards enabling better decision-making**

# Program View

- ✓ Lead Planning activities for all initiatives that are information management driven
- ✓ Support Planning activities for Business Line Capability focused Projects

ILLUSTRATIVE



Improved planning within IT results in better outcomes for the firm

# Alignment to Freddie Mac's Goals

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## Corporate

- Serve our Mission
- Participate in an active, meaningful manner – in the ongoing discussions about GSE future state
- Transform our company, with particular emphasis on technology improvements
- Be compliant with industry standards

## Division

- Deliver Corporate Priorities
- Continue to support Federal Government Programs

## Department

- Corporate Priorities Solutioning and Delivery including Corporate Priorities
- Improve IT environments

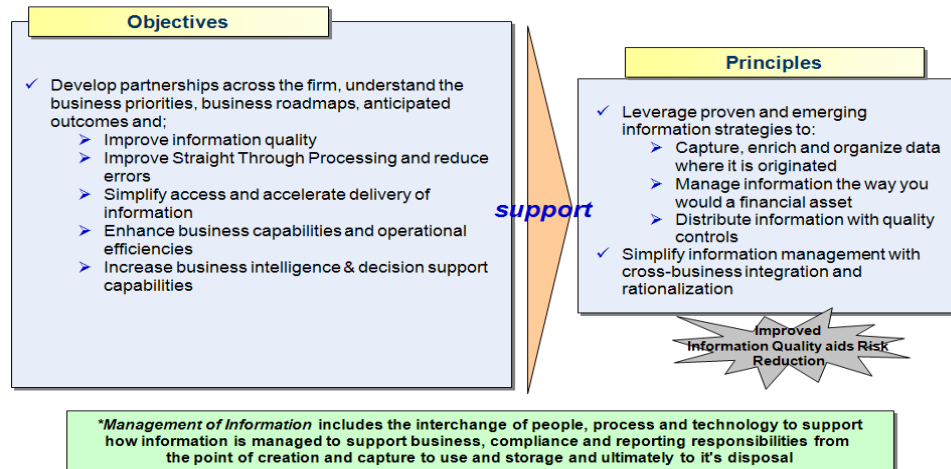
## Organization

- Improve information quality, controls and delivery thru early planning, better requirements and solutioning

# Summary

## Objectives

**Objective:** Establish *information management* planning (and solutioning) function within IT that would complement current functions, and provide focus on the improvement of information quality in support of better business decisions



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- ✓ Information Management expertise up front in the planning process undoubtedly adds value including the following:
  - Improved and more complete data requirements
  - More precise “level of effort” resource estimates
  - Use of enterprise assets (e.g. CDW, Reference Data, other services)
  - Data Control guidance