

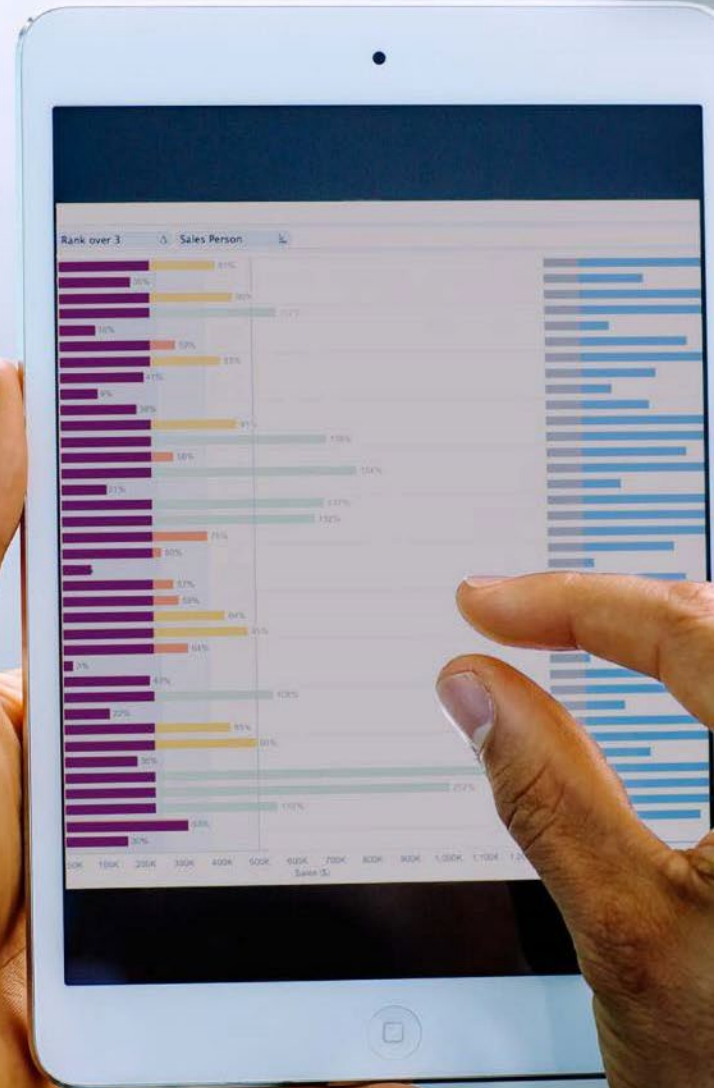


A case study in data mapping – Are you ready for a new norm?

Dennis Kiker | KPMG, LLP

Stewart Byrd | KPMG, LLP

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Presentation objectives

What is a records management data map?

What is the value-add?

A case study in data mapping

Quick tips and lessons learned

Questions/Comments

What is a records management data map?

The screenshot displays a data mapping interface. On the left, a tree view shows the source data structure 'ShortPO' with elements like 'CustomerItr', 'LineItems', and 'Amount'. On the right, the target structure 'CompletePO' is shown with 'Customer'. A central window shows a spreadsheet with the following data:

	A	B	C	D	E	F	G	H
1	Indicator Name	Indicator Code	Country Name	Country Code	2008	2009	2010	
2	GNI per capita, Atlas	NY.GNP.PCAP	Afghanistan	AFG	290	370	410	
3	GNI per capita, Atlas	NY.GNP.PCAP	Albania	ALB	3820	3960	3960	
4	GNI per capita, Atlas	NY.GNP.PCAP	Algeria	DZA	4260	4410	4450	
5	GNI per capita, Atlas	NY.GNP.PCAP	American Samoa	ASM				
6	GNI per capita, Atlas	NY.GNP.PCAP	Andorra	ADO	41750			
7	GNI per capita, Atlas	NY.GNP.PCAP	Angola	AGO	3420	3880	3940	
8	GNI per capita, Atlas	NY.GNP.PCAP	Antigua and Barbuda	ATG	15210	13690	13170	
9	GNI per capita, Atlas	NY.GNP.PCAP	Argentina	ARG	7190	7580	8620	
10	GNI per capita, Atlas	NY.GNP.PCAP	Armenia	ARM	3340	3050	3200	
11	GNI per capita, Atlas	NY.GNP.PCAP	Aruba	ABW				
12	GNI per capita, Atlas	NY.GNP.PCAP	Australia	AUS	41760	43590		
13	GNI per capita, Atlas	NY.GNP.PCAP	Austria	AUT	46790	46630	47060	
14	GNI per capita, Atlas	NY.GNP.PCAP	Azerbaijan	AZE	3870	4800	5330	
15	GNI per capita, Atlas	NY.GNP.PCAP	Bahamas, The	BHS	21660	20610		
16	GNI per capita, Atlas	NY.GNP.PCAP	Bahrain	BHR	18730			
17	GNI per capita, Atlas	NY.GNP.PCAP	Bangladesh	BGD	570	640	700	
18	GNI per capita, Atlas	NY.GNP.PCAP	Barbados	BRB	11610	12660		
19	GNI per capita, Atlas	NY.GNP.PCAP	Belarus	BLR	5430	5590	5950	
20	GNI per capita, Atlas	NY.GNP.PCAP	Belgium	BEL	45140	44660	45910	
21	GNI per capita, Atlas	NY.GNP.PCAP	Belize	BLZ	3760	3790	3810	
22	GNI per capita, Atlas	NY.GNP.PCAP	Benin	BEN	730	780	780	

What is the value-add?

- **Records Information Management (RIM)**
 - Policy; record retention; standards; life cycle management
- **Legal**
 - eDiscovery; legal holds; compliance; consistency
- **Privacy**
 - Confidential information; risk; PCI; PII
- **Compliance**
 - Regulatory; industry specific; FINRA, SEC; audits
- **IT security**
 - Cybersecurity; access controls; breach detection

A case study in data mapping – planning

— **Develop RIM program roadmap**

- Define RIM program objectives
- Tie RIM program success to understanding where records reside
- Demonstrate how data map supports RIM program objectives

— **Executive buy-in**

- Value triggers

— **Identify RIM committee to support**

- One or more members per department
- Designated records liaison for project and beyond

— **Educate RIM committee members**

- What is RIM
- RIM program charter
- RIM program roadmap

A case study in data mapping – execution

> Define the data elements that are needed in the data map

> Develop questionnaire to capture data elements

> Administer questionnaire to pilot group

> Refine questionnaire

> Administer questionnaire to business users

> Transform data from questionnaire

> Validate and cleanse data

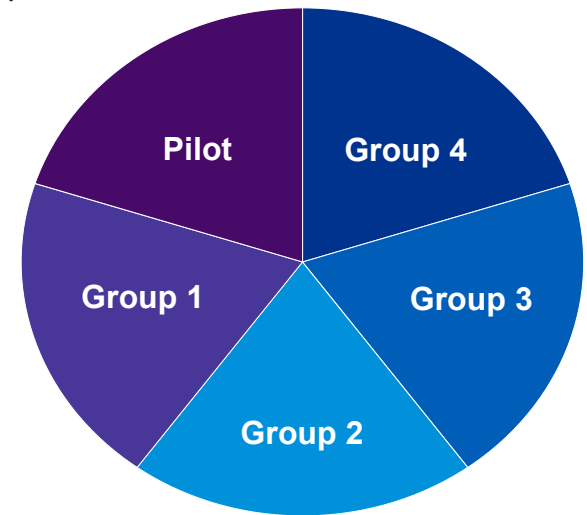
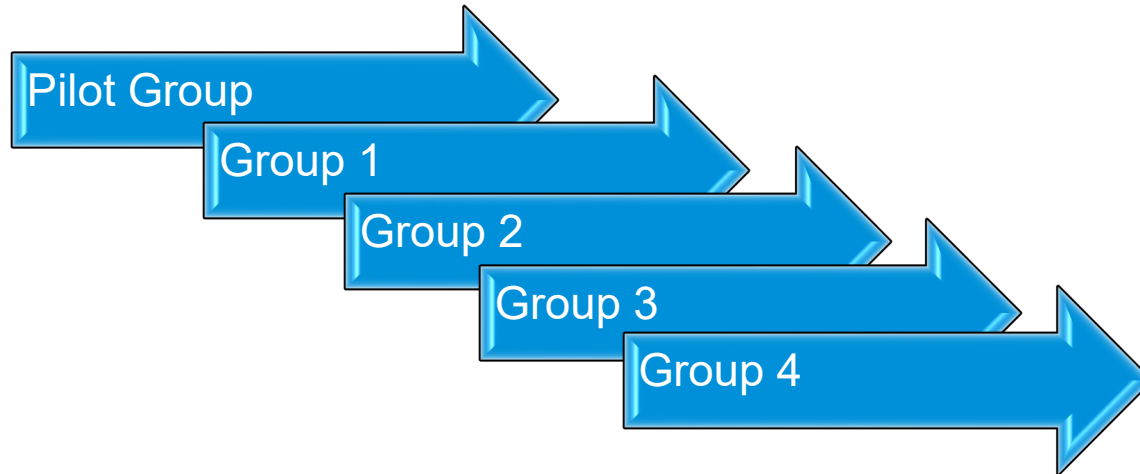
> Compile data and populate database

> Finalize data map application

A case study in data mapping – execution

— Questionnaire

A case study in data mapping – execution



A case study in data mapping – execution

— Inconsistency Report

A case study in data mapping - metrics

Project statistics:

— Lines of business	10
— Business units	70+
— RIM Committee Members	68
— Business records types	2,349
— DMQs submitted	62
— Data elements	86+

Quick tips and lessons learned

- Define scope of tool up front – be stingy with data elements!
- Choose data collection tool carefully – understand capabilities and limitations
- Consider phased implementation to reduce scope
- Plan for IT support and maintenance of data map



Thank you

Contact information:

- *Dennis Kiker* | Director Advisory | KPMG, LLP
dkiker@kpmg.com
- *Stewart Byrd* | Manager Advisory | KPMG, LLP
slbyrd@kpmg.com



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