



A MARKETING GEEK'S GUIDE TO:

# DATA GOVERNANCE





## ABOUT THIS SERIES

Governance is undoubtedly a major part of your marketing operations, and if not, it's likely on your roadmap. As we all look for ways to better manage our processes and data, we may struggle with how to best start the process or choose an approach. That's where this eBook comes in - it's time to tackle governance and data governance strategies and techniques.

There is a lot that goes into your marketing strategy, and it's not something you should go at alone. Lucky for you, our experts have you covered. At Relationship One, our mission is to "Inspire Success." We hope that reading through this eBook will inspire you to try something new, solve a problem you've been dealing with, or invent something that will take your marketing efforts to the next level.

Let our experts help you dive into an area of modern marketing that you're curious about and let the inspiration flood in.

# A MARKETING GEEK'S GUIDE TO: DATA GOVERNANCE

Although governance can sometimes be overlooked, it plays a critical role in ensuring proper segmentation, lead management, and reporting, not to mention the integrity of your systems and processes.

This eBook tackles all facets of governance from approach and methodologies to implementation. We'll get you started by reviewing the major areas to consider for governance as well as how you can approach planning in your organization. From there, we dive deeper into data governance, one of the most important facets of your governance program. Throughout, we'll share thoughts on best practices and hands-on implementation.

All of that packed into one easy read, all from our in-house experts. So kick back, relax, and get your best reading glasses ready. Let's get to it!





# CHAPTER 1: KICK-STARTING YOUR GOVERNANCE PLANS

Often, governance is the last thing on people's minds, but I argue that it should be the first thing. While the word itself can cause an outbreak of snoring, governance touches so many important aspects it's difficult to be a success in marketing automation without it.

For clarity, let me define governance as "the processes and standards used to ensure a system is operated so it predictably meets business requirements". If that sounds boring, let me put it more plainly: It's the way everyone agrees to use your platform so they don't mess it up. Joking aside, the keywords are

- 1. Predictable:** Good governance ensures all users know what to expect when logging into your system. Things aren't lost down a black hole and everything can be easily troubleshooted if necessary
- 2. Business requirements:** Good governance keeps your instance supporting business requirements and prevents bad data & poor customizations — which can degrade reporting, segmentation and personalization — from building up.

If you've bought into the need for governance, knowing how and where to start with a strong governance strategy isn't easy. It requires a solid understanding of your business and buy-in from key stakeholders. For people looking for a primer on crafting a solid plan, here's a great article that outlines the overall process for a [successful Marketing Governance plan](#). Knowing the process, however, is just a part of the puzzle. Governance is a large area, so here are some key considerations that you should make during your planning process:

## DATA

When it comes to data governance, you should think about what data is needed to make your data able to be

1. Traced back to the source, so that if bad data gets

into your instance, you're able to find the source and prevent it from happening again. This covers not only the data itself, but also the naming conventions and processes used for manual uploads and integrations

2. Segmented in a predictable manner. In other words, as much as possible, how can you standardize your data so that users do not have to second guess themselves.
3. Reported. In particular, because Eloqua Insight enables you to mix contact data with campaign results, think about what data is needed in order for you to identify your most engaged contacts and valuable leads

In addition to the above, you should also consider data storage and archiving. For example:

- What is your approach to contacts who hard bounce or unsubscribe? If they are to be deleted from Eloqua, will the contact data be stored somewhere else?
- As Eloqua only contains 25 months of activity data, is there an organizational need to archive older data outside of Eloqua for either reporting or legal reasons?
- Given the storage limits on Custom Data Objects, how long do you want to keep records that have been created in a CDO?

## ASSET ORGANIZATION

One of the benefits of marketing automation is to quickly assemble and report on complex, multi-channel campaigns, as well as reuse various assets in different campaigns. However, these advantages are curtailed if users can't find those assets or easily tell how the assets are related to each other. In addition to this, poor asset organization will also impact your ability to perform lead scoring, as Eloqua enables you to score users on their engagement on assets contained within specific folders and sub-folders.

Often, Eloqua users start with well intention, but it soon

becomes a wild west with assets named poorly, stored in ad-hoc folders or not foldered at all. To ensure that your instance remains easy to search and report on, follow this process for [designing the best naming convention and foldering structure](#).

## USER CREATION AND ON-BOARDING

As adoption of your instance grows, not only will you have more users, but also users with different levels of skill. You'll need a way to not only ensure that users have access to assets and data that are relevant to their roles and skill set, but also that each one is appropriately onboarded. Every instance of Eloqua has a unique data structure, organization, and associated business processes. Ensuring that your users are familiar with those customizations BEFORE they use the system will speed adoption and ensure that governance is followed.

## CAMPAIGN PROCESS AND REVIEW

When most people think about the campaign process, they normally only consider the campaign brief, which outlines the goals, the associated assets, and campaign flow, and the approval process. While this is important, you should also consider

**Campaign meta-data:** Eloqua provides users with the ability to add information about the campaign (for example, region or associated product), which can then be used later in reporting and segmentation. Good campaign meta-data can make it easy for you to identify what types of campaigns perform best and to also create lead nurturing strategies based on engagement with particular types of campaigns.

**Campaign review:** while many people report on campaigns, few organizations have a formal, periodic, campaign review process. Without a set process, it will be difficult to consistently improve your marketing strategy and execution. By setting a formal review, you'll be able to diagnose why certain campaigns did well and build those into your future initiatives.

## CHANGE MANAGEMENT

In time, you'll want to make more customizations to your Eloqua instance to meet new business requirements or refine your current processes. Doing so in an ad-hoc manner can negatively impact your on-going campaigns, especially if there are unforeseen consequences.

To avoid these, it's important to have a change management plan. This plan should cover how changes are prioritized, scheduled, tested, communicated to users, and documented. When it comes to documentation, make sure that your layout and standard enable "living" documents. That is, documentation that can be constantly updated as changes are made to your instance. Nothing is worse than documents that are created once and then forgotten and quickly outdated.





## CHAPTER 2: GOVERNANCE CONSIDERATIONS WHEN PLANNING YOUR MARKETING AUTOMATION IMPLEMENTATION

Governance within a marketing automation platform is commonly used as a tool for managing workflows and mitigating risk. Practices are typically well established and ingrained into the daily production routines of a marketing team's processes, and they can often be overlooked or under-appreciated when an organization implements a new marketing automation platform.

The fact is, there's a lot that can be accomplished during an implementation by a robust and well-considered governance policy. More and more frequently, organizations that are switching MA platforms are bringing governance to the front row to help manage the transition and set the team up for success moving forward.

### TEAM READINESS

One of the biggest areas we've seen governance officers take on during an implementation is preparing the marketing team for the transition. While this is typically seen as the role of change management, governance teams are often better positioned to provide critical resources to marketers. It is also the first step in establishing best practices for the organization. Here are a few ideas on how governance teams can take the lead on organizational readiness.

- **Resources Links Page:** Collect all training documents, videos and how-tos available from the new MA platform and organize them into a resources page for the Marketing team. Consider grouping the links by role or task, especially if the resources available from the new platform are poorly organized or hard to search.
- **Contact Form:** Set up a form that marketers can use to ask questions or request assistance. Some employees are hesitant to ask for help with a phone call or in a meeting. Having an internally available request form is a great resource and will help you get your team ready for day 1.

- **Internal How-tos:** Create a custom-tailored collection of asset creation guides and other how-tos that address your organization's specific business requirements.
- **Certification Tracks:** An internal set of how-to resources can be a starting point for developing internal platform certifications. Define the different tiers of users, align them with their core tasks and create a series of instructional materials to support their needs. Certification can be as simple as having watched or read the materials, or more complex requiring exams and periodic renewals.

### MAINTENANCE AND MONITORING

Team readiness is an area of governance that focuses on the migration and launch period of an implementation. Maintenance and monitoring is largely a post-implementation effort to ensure that systems and processes created for the implementation launch remain.

- **DNS Maintenance:** Secure domains are a necessary part of any modern marketing automation platform since they are used for things like landing pages, image hosting, analytics trackers and more. At some point, however, all of them will expire. A governance officer is often well positioned to keep track of these renewal cycles and can alert IT at the proper time to prevent things from slipping through the cracks.
- **Field Cleansing and Normalization:** Make sure a data cleansing program is included as an implementation task. Aligning phone numbers, country codes, industries and other fields around a common set of values is important for successful campaign execution and CRM integration.
- **Database Health Monitoring:** Set up a collection of key metrics that reveal the overall health of the contacts in your database and can be displayed on a dashboard. Typically, this is a set of engagement

points intended to show at a high-level what percentage of your database is engaged and what percentage is reachable. This is also commonly used to track database growth and show the frequency and volume of net new contacts entering the platform.

When governance is involved early in the implementation process, it becomes much easier to ensure the right training is provided, that standards are established up front and that all marketers are empowered to support your organization's best practices.

After an implementation is completed, governance can help ensure smooth operations, high data fidelity and ongoing visibility into key health and engagement metrics.





## CHAPTER 3: THREE TIPS FOR MANAGING YOUR DATA GOVERNANCE

What is Data Governance and why does it matter in marketing technology? As you may already know from the name, data governance is governing your data. But what does this really mean and why does it matter? Setting up a governing process or framework for your data ensures there are standards and processes managing how it's compiled, used, and maintained. This allows marketers to have a greater level of control and understanding of their data, which allows them to harness it for even greater marketing success.

### TIP #1 – DATA CLEANUP & ONGOING MANAGEMENT

Personalized marketing is only as good as the data being used. So, it's important to routinely monitor and update your data to ensure you're working with the best information available. Keeping track of the initial source can be key in managing or even removing bad data in the future. You want to ensure system data is being actively managed since it is continually updated from any number of external sources as well as internal updates or customer submissions. Having a process in place to review the data periodically can help ensure your team is always working with the best data possible.

### TIP #2 – ASSET CREATION & ARCHIVAL PROCESS

As assets are created in the system, it's important to follow naming conventions and a hierarchical folder structure. What that structure looks like is entirely up to your team and what makes the most sense for your marketing plans — some teams break it down by region or fiscal year, the campaign type, etc. Whatever it is, once established, it's important to follow that structure moving forward to ensure all assets are easily found and managed. Another important aspect of data governance is archival. As the lifecycle of an asset comes to a close, it can be helpful to archive those assets and declutter your active folders. Together, naming conventions and folder structure are key in ensuring the right infrastructure is in place to easily support your marketing activities.

### TIP #3 – DOCUMENTATION & CHANGE MANAGEMENT

Documentation of custom processes is vital to ensuring continuous understanding of how the system operates across teams. Having a company-wide data management strategy is important, and equally important is continuously improving upon that strategy. This is best done by re-evaluating existing plans and business processes in place to decide what changes (if any) are worth putting into practice. Various stakeholders may have different goals in mind and, with documentation, it's easier to keep all users abreast of the overarching infrastructure. This way, when change management comes up, it's easy to understand what other processes may have an impact on the proposed changes. Having the big picture is an important part of being able to adequately develop a uniformly useful system without disrupting existing processes.

How will this help your team? Through continuous data evaluation and management, you'll be working with the best data at all times. By following an established structure through naming and foldering conventions, the system will be easily navigable. Also, by managing changes and documenting existing processes, the system will be readily understood across teams. This company-wide understanding of your marketing technology platforms will allow room for growth and greater flexibility when making decisions.



## CHAPTER 4: THE IMPORTANCE OF DATA GOVERNANCE

More and more marketers are beginning to understand not only what data governance is, but also why it's important. This understanding, and the subsequent implementation of new data governance processes, allows data governance to become an integral part of the day-to-day business operations within an organization. But as marketers opt to operationalize these processes, they're finding more technology options, more quality measures, and more privacy regulations with which to contend. That may lead some to realize that while data governance decisions are led by the business, they must also be supported by IT.

As new data governance processes are implemented, and new challenges arise, it's crucial to consider the following:

- Digital Innovation of Automated Processes** – with the increased demand for data governance, many are turning towards the advances offered by leveraging new technologies like artificial intelligence (AI) and machine learning (ML) or the Internet of Things (IoT) – all three are buzzwords you've probably encountered at conferences, in industry webinars, or during the sales process as you purchase new products for your tech stack. These technologies are becoming required capabilities worth investment as we look to capitalize on our online presence with the ability to personalize, react to engagement in real-time and operationalize the vast amounts of data being captured.
- Data Quality Measures of Process Digitization & Auditing Needs** – as technologies like AI and ML make their entrance in helping govern data, there is also going to be an increase in effort to maintain data quality. Automated processes are only going to be as good as the inputs they're being given, so while these agents may accelerate data processing speeds and increase data processing power, they also can be limited in their effectiveness

without audits to ensure quality results. Since better data quality overall is one of the main goals of implanting a data governance strategy this manual/human oversight will be key in running effective digitized processes as a part of data governance.

- Roles & Responsibilities** – with radical shifts in the digital landscape, and as more organizations implement good data governance practices, there will be a cultural shift from a campaign-centric approach to a data-centric one. With that change in business function, it's fair to expect a change in roles and responsibilities as well. Organizations with more mature data governance and data management approaches may begin to make room for Chief Data Officer (CDO) roles, which are becoming more common as companies look to the future of a data-driven world.

Moving beyond an initial implementation of basic data clean up into a more mature and overarching governance policy will push organizations forward and potentially shape their internal dynamic as new technologies are used and the associated auditing requirements increase. With data, technology, and effectiveness being key drivers behind good governance, we will continue to see radical shifts in the digital landscape to help shape what data can do for us as we follow the growth and change in our industry.

# WRAPPING THINGS UP



Do you hear that? It's the sound of champagne popping and confetti falling to the floor because you're one step closer to Data Governance expertise! So, get in there and start putting your new knowledge to work.

It's been our pleasure to guide you. If you're beginning to work on your governance and need support, please [contact us](#). We love helping companies make the most of their marketing tools!

