

Simatree Case Study:

Enterprise Data Management (EDM) Strategy & Implementation

Simatree supported a financial regulatory organization with a strategic roadmap and implementation services to migrate to a new system and practices

Overview

Simatree supported the data and technology office of a financial regulatory organization as it underwent a multi-faceted transformation to modernize and mature its data and analytics capabilities. With an existing reliance on manual business processes, the organization needed to transform how teams leveraged data to execute critical missions.

As part of this engagement, Simatree supported the organization with developing a multi-year information technology (IT) roadmap, spearheading an Enterprise Data Management (EDM) strategy & implementation, overseeing cloud migration of a strategic legacy system, and enabling the launch of a new Power BI business intelligence capability that advanced capabilities.

The Challenge

The organization was undergoing critical and large-scale transformations that required a rapid maturing of its data and analytics capabilities. This was a significant challenge as the preexisting data architecture, internal skill sets, and overall data quality of the legacy reporting processes and systems was out of date. Simatree was engaged to support the recommendation of a modern technology platform based upon Azure, the implementation services, and the strategic roadmap to migrate into their new system and practices based upon the documented data strategy. The existing legacy system was tightly integrated into many internal processes and the data quality issues were significant due an ineffective data governance practice. The need was to ensure that the organization's long-term maturation would yield improvements in data quality, management, and governance.

The Solution & Benefits

Simatree led a multi-divisional pilot that sought to promote data usage and analytical maturity. The team engaged leaders across the organization by hosting working sessions to capture input and ideas from all stakeholders. Simatree utilized an Agile approach, including

introducing scrums to the business to manage timelines and responsibilities, keeping the project on schedule.

Simatree was also engaged for the establishment phase of EDM system implementation, including developing the data architecture, production management processes, and overall best practices of the modern platform. Simatree designed and constructed the modern cloud platform, Enterprise Data Hub (EDH), as part of a strategic roadmap to serve as the data management and analytics platform. In addition to supporting new data sources, a key component was to migrate the function of a highly visible legacy system to the EDH, while upgrading supporting processes to the new framework and best practices. The Simatree team provided support to design and establish the platform, technology, and data pipelines, and continues to provide support to add data technology components and develop practices to support the foundational architecture. A scalable data governance framework was established to ensure the integrity of master data and its integration for enterprise needs, focusing on joint decision-making and collaboration with the business.

Simatree also developed the core data models for numerous data sources based on a repeatable assessment of data sources that established the overall framework for data migrations in the future. The assessment included the primary types of data sources EDH would need to support, data flows, and maturity levels. Initial focus was the redesign of the existing legacy data warehouse and addressed several historical design flaws with the legacy design and integration limitations.

Finally, the team ingested and connected several critical data sources across a business lifecycle. The project allowed executive leadership to identify trends and patterns in activity and determine how the organization has made an impact in its industry.