Introduction to MIKE2.0

The open source standard for Information Management

A brief overview of MIKE2.0 and how it can be used for structuring and implementing complex IM solutions

Mark Burnett, Andreas Rindler

Information Management Issues are Driving Priorities

<table>
<thead>
<tr>
<th>The Challenge</th>
<th>The Approach</th>
<th>Content Model</th>
<th>omCollab</th>
<th>Case Studies</th>
<th>Call to Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIO</td>
<td>• CIOs are faced with both sides of the business; needs for growth and expansion and cost justification for each IT project</td>
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<td></td>
<td>• Institutions are spending Millions each year on IT but feel they have reached the limits that enable them to contain costs yet enable large-scale acquisitions</td>
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<td>CFO</td>
<td>• In the post Sarbanes-Oxley environment where CFOs are asked to sign off on financial statements, the quality of data and the systems that produce that data are being scrutinized now more than ever before</td>
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<td></td>
<td>• Growth can only come with efficient architectures and synergistic investments in technology</td>
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<td>CRO</td>
<td>• Risk compliance in financial institutions has become more complicated by a number of regulations such as Basel II accord and USA Patriot act</td>
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<td>• A siloed approach to compliance is no longer valid, significant savings can be found in the pooling of initiatives around risk</td>
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<td>CMO</td>
<td>• In an environment where CMOs are being asked to grow revenues with less manpower than ever before, new regulations are getting in their way of being effective</td>
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<td></td>
<td>• Privacy policies, and opt out policies are destroying pre existing databases and making it hard to cross sell and up sell existing customers</td>
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</table>

YOUR TOP 10 TECHNOLOGY PRIORITIES

1. Integrate/enhance systems and processes
2. Ensure data security and integrity
3. Enable business intelligence
4. External customer service/relationship management
5. Redesign or rationalize the IT architecture
6. Enable or enhance e-commerce
7. Enable mobile/wireless
8. Deploy Web services
9. Automate or optimize the supply chain
10. Scale IT globally

Information management is a “complexity challenge” and a new vision to meet it

### Issues
- Recognize the **complexity** of data and information is not appreciated; they are in constant flux across the enterprise 24 hours a day
- True **business insight** still very hard to attain and data **quality** is a huge problem
- Processes and standards for managing and reporting data and information have not kept pace – everyone has “their” way

### Vision
- Many problems are solved through informal networks – we need to **link formal structures to these networks**
- We want organisations to begin to develop a competency for “**Information Development**”
- We aim to **re-shape the industry** by creating the standard for information management
- An **open and collaborative approach** is the key to delivering a standard for such a complex problem

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MIKE2.0 as open source framework to structure and deliver complex IM solutions

### MIKE2.0 (Methodology for an Integrated Knowledge Environment)

#### Open
- The core of our approach is based around an open source framework
- A free standard you can apply to any project
- Evolves and improves over time

![MIKE2.0](www.openmethodology.org)

#### Consultative
- A systematic approach to solving information complexity
- Links together all Information Management projects
- Technology independent solutions

#### Accelerated
- Architecture and governance frameworks
- Reduce cost with already-built assets
- Leverage assets already shown to work on similar problems
History of MIKE2.0 and Factoids

A mature, comprehensive approach supported by fast growing community

- Early versions (DAK, MIKE) focused on data warehousing by BearingPoint (2003-2005)
- Extended to include unstructured data and released internally as MIKE2 (2005)
- Open sourced as MIKE2.0 on www.openmethodology.org (2006)
- MIKE2.0 Governance Association founded by BearingPoint and Deloitte (2009)

As of February 2010
- 2,000+ registered users
- ~10,000 visitors per month (60% growth YoY)
- ~700 content pages, 600 files
- 5.0M page views since 2006

The MIKE2.0 approach has been widely recognized by the industry

<table>
<thead>
<tr>
<th>Standards Bodies</th>
<th>Analyst Recognition</th>
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<tbody>
<tr>
<td>Has based several of their training and specialist certification programs (including Enterprise Content Management and Enterprise 2.0) around MIKE2.0 and uses the overall approach as a training case study.</td>
<td><em>Comparable to MIT’s approach to IP... and adding greatly to the discussion about the value of consulting.</em> – IDC</td>
</tr>
<tr>
<td><em>BearingPoint has open sourced its information architectures and methodology – something called MIKE2.0...I salute this vision, and am looking forward to have IBM contributing to MIKE2.0’s success.</em></td>
<td>MIKE2.0 listed as top tier data governance methodology – The MDM Institute</td>
</tr>
</tbody>
</table>

In Groundswell: Winning in a world transformed by social technologies, authors Charlene Li and Josh Bernoff present a case study on MIKE2.0. The book describes the value it brings to client-consultant collaboration.

Source: http://www.forrester.com/Groundswell
Enables organisations to establish a "balanced view" model

- To meet emerging requirements we believe you must take an information development approach
- Taking an information development approach means that we re-balance the work we do to focus on information as much as we focus on function, processes and infrastructure
- Information development then becomes the driving force for a successful transformation program

What is Information Development then?

Information and Infrastructure as Technology Backplane.

Integration of data architecture with people, process, organization, technology and strategy results in 'Information Development'.

Explicit work streams on any initiative

- Application Development
- Infrastructure Development
- Information Development
## MIKE2.0 Assets for Re-Use (1/2)

<table>
<thead>
<tr>
<th>MIKE2.0 Asset</th>
<th>Value it provides</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Approach &amp; Solutions</strong></td>
<td>The overall approach of MIKE2.0 includes a 5 phase common methodology, a task list, over 40 solutions across 6 solution groups with supporting accelerators and a collaborative community.</td>
</tr>
<tr>
<td><strong>Architecture Framework</strong></td>
<td>The SAFE architecture framework (Strategic Architecture for the Federated Enterprise) of MIKE2.0 provides best practices and a systematic method to define your target information architecture.</td>
</tr>
<tr>
<td><strong>Governance Framework</strong></td>
<td>Information Governance is one of the foundational solutions of MIKE2.0, providing a comprehensive framework for technology &amp; architecture, organisational models, data quality improvement and the basis for an overall information management strategy.</td>
</tr>
<tr>
<td><strong>Assessment tools</strong></td>
<td>Assessment tools such as IM QuickScan enable you to get a quick understanding of your information maturity level and compare it to leading practices. Other tools are used to assess infrastructure, vendor technologies etc.</td>
</tr>
</tbody>
</table>

## MIKE2.0 Assets for Re-Use (2/2)

<table>
<thead>
<tr>
<th>MIKE2.0 Asset</th>
<th>Value it provides</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Estimating Models</strong></td>
<td>Estimating models help to size the implementation of complex information management programs.</td>
</tr>
<tr>
<td><strong>Economic models</strong></td>
<td>These models help define value improvements from better Information Management, allocate costs for enterprise initiatives and define your business case.</td>
</tr>
<tr>
<td><strong>Integrated Repository</strong></td>
<td>The integrated content repository links best practice assets across projects into the MIKE2.0. You can follow the same model for your project.</td>
</tr>
<tr>
<td><strong>omCollab</strong></td>
<td>We provide a free technology product for collaboration, training of your information management organisation to build capability and linking your internal initiatives into the MIKE2.0 standard leverage and re-use free assets.</td>
</tr>
</tbody>
</table>
The MIKE2.0 Content Model

The solution scope for MIKE2.0 covers all of Enterprise Information Management.
Overall Implementation Guide – 5 Phases of MIKE2.0

Information Development through the 5 Phases of MIKE2.0

- Strategic Programme Blueprint is done once
- Continuous Implementation Phases
  - Increment 1
  - Increment 2
  - Phase 2: Design
  - Phase 3: Roadmap & Foundation
  - Phase 4: Implementation
  - Phase 5: Development

Improved Governance and Operating Model

Our Approach

- Content Model
- omCollab
- Case Studies
- Call to Action

Overall Task List

- 10-17 Activities per Phase
- 2-12 Tasks per Activity
- For each Task we define:
  - Objectives
  - Inputs
  - Outputs
- Supporting Assets in MIKE2.0 provide ~190 deliverable templates across all tasks

Overall Task List

**Phase 1 – Business Assessment and Strategy Definition Blueprint**

Activity 1.1 Define MIKE2.0 Strategy
- Task 1.1.1 Identify Organizational Setting with Sponsorship
- Task 1.1.2 Meet with Key Stakeholders
- Task 1.1.3 Build Collection of Stakeholders
- Task 1.1.4 Identify Current State of the Project Activities
- Task 1.1.5 Establish Charter for Information Management Programme
- Task 1.1.6 Capture Detailed MIKE2.0 Blueprint

**Activity 1.2 Develop Information Management Awareness**

- Task 1.2.1 Perform Team’s Understanding of Information Management Concepts
- Task 1.2.2 Develop and Initiate Information Management Orientation

**Activity 1.3 Develop Business Strategy for Information Development**

- Task 1.3.1 Define Strategic Business Vision
- Task 1.3.2 Define Strategic Competitive Success Factors (CSFs)
- Task 1.3.3 Define Strategic Application Architecture (SAA)
- Task 1.3.4 Define Strategic Success Measures
- Task 1.3.5 Define Strategic Change Drivers
- Task 1.3.6 Define High-Level Information Requirements

**Activity 1.4 Organizational Readiness for Information Development**

- Task 1.4.1 Assess Current State Application Portfolio
- Task 1.4.2 Assess Current State Enterprise Data Architecture
- Task 1.4.3 Assess Current State Information Platform
- Task 1.4.4 Assess Current State Information Delivery
- Task 1.4.5 Assess Current State Information Security
- Task 1.4.6 Assess Current State Information Technology
- Task 1.4.7 Assess Current State Information Policies
- Task 1.4.8 Assess Current State Information Processes
- Task 1.4.9 Assess Current State Conceptual Architecture
- Task 1.4.10 Assess Current State People Skills
Overall Implementation Guide – Usage Model to customise for different solutions

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<tr>
<td>• Many Activities are shared across all solutions</td>
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<td>• Every solution only needs a subset of all Activities</td>
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<td>• Indicators for what Activity is needed for each solution</td>
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<td>– Definitely performed</td>
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<td>– Should be performed</td>
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<td>– May be performed</td>
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<td>– Typically not performed</td>
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<td>– Not performed</td>
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<td>– Not rated yet</td>
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Supporting Assets across all Solutions

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<tr>
<td>• Tools and Technique Papers are methods that can be used to speed up the implementation process (e.g. Information Maturity QuickScan, Technology QuickScan, etc.). Oftentimes incorporated into Solution Offerings.</td>
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<td>• Deliverable Templates are framework documents that can be used on any project implementation. Unlike Tools and Technique Papers which are focused on process, Deliverable Templates provide a document structure that defines the output of an activity and its tasks.</td>
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<td>• Capability Statements are overview presentations, selling messages, client cases studies and vendor case studies related to the MIKE2.0 Methodology.</td>
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<tr>
<td>• Software Assets are open-source software artifacts that can be used as part of the overall methodology (e.g. omCollab, the collaboration platform powering MIKE2.0). Users may also wish to house private software assets mapped into the overall framework. Vendors can also map in their product sets through MIKE2.0 Vendor Solutions.</td>
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<tr>
<td>• Engagement Management Assets provide recommended team structures, estimating models and starter project plans for conducting Information Development projects. Engagement Management Assets are often MIKE2.0 Private Supporting Assets but some of these assets are available on the open methodology site.</td>
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<tr>
<td>• Project Examples are example deliverables (both document and software-based) that have been used in Information Development implementations and can help provide guidance for project implementations.</td>
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A Comprehensive Information Governance Program

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</table>
| • Overall vision for Improvement  
  • Programme implementation plan  
  • Linkage of business to technology and strategic to tactical | • Flexibility to change  
  • Open and Common standards  
  • Strategic Conceptual links through to incremental Solution Architecture  
  • End-to-End Data Security | | | | |
| • Quantitative understanding of issues  
  • Ongoing monitoring  
  • Tracking of issues for improvement  
  • Correction processes  
  • Root cause analysis and supply chain approach  
  • Focus on Key Data Elements | • Information Development Organization  
  • Data is an embedded competency in all staff  
  • Data stewards and named senior stakeholders across the organization | | | | |
| • Change to new information-centric models  
  • Training enablement  
  • Leadership  
  • Collaborative techniques | • Best practices and methods  
  • Metrics definition  
  • Data standards, policies and processes  
  • Policy framework  
  • Properly defined controls  
  • Evolving and improving framework | | | | |

Strategic Architecture for the Federated Enterprise (SAFE)

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</table>
| Conceptual and component based architecture supporting solution delivery:  
  • Phase 1: Building the Blueprint Conceptual Architecture  
  • Phase 2: Building the Strategic Blueprint Logical and Physical Architecture  
  • Phase 3: Building/Refining the Incremental Solution Architecture | | | | | |
omCollab is the technology that runs MIKE2.0 and it’s open source as well

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<tr>
<td><strong>omCollab</strong> is based on a foundation of the leading collaborative technologies and provides the following capabilities</td>
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<tr>
<td>- Wiki to collaboratively create and share content (based on MediaWiki which powers Wikipedia, the world’s largest Wiki)</td>
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<td>- Blogs to publish individual or group-based information (based on Wordpress, the world’s most popular blogging platform)</td>
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<td>- Social Bookmarking for storing, sharing and discovering web bookmarks (based on Scuttle, an open source model of Del.icio.us, one of the largest bookmark sharing services with more than 3 million users and 100 million bookmarked URLs)</td>
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<td>- Social Networking – A Facebook inside the Enterprise that is integrated into the other components</td>
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<td>- Enterprise Search Integration to discover content in federated repositories across the organisation that can be easily integrated with SLaM’s existing FAST implementation</td>
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<td>- Rich User Interface to provide personalisation, interactivity and a common look and feel</td>
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<tr>
<td>- Open Methodology Compliance (OMC) capability to link your organisation into open standards (links to MIKE2.0, the leading open methodology standard for Enterprise Information Management)</td>
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<td>- Integrated Content Repository to provide a governance model for knowledge sharing and content integration across federated document management systems and file servers</td>
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omCollab is a product to collaborate, harness innovation and share knowledge

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<tr>
<td>- You can use omCollab to create a single collaborative environment for:</td>
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<td>- Innovation and IP sharing</td>
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<td>- Determining the best research on the web</td>
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<td>- A knowledge environment that builds grows over time</td>
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<td>- A next generation intranet - a web 2.0 “writeable web” environment</td>
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<td>- omCollab also provides:</td>
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<td>- Accelerators to develop collaborative content</td>
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<td>- Mashup technologies to integrate to MIKE2.0</td>
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<tr>
<td>- A structured approach to driving meaningful collaboration</td>
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http://mike2.openmethodology.org/wiki/OmCollab
omCollab is a key element of enabling the integrated content repository

The standard provided by MIKE2.0 links to the best IM assets on the web and within companies that link their internal approach and knowledge to the open standard in order to quickly integrate MIKE2.0 with internally-held assets.

**Web 2.0**

MIKE2.0 provides a common competency for information management, it’s a single standard that is open to anyone.

MIKE2.0 is housed within an open methodology framework that balances stability with innovation.

Community members use social networking technologies to share experiences and build relationships.

**Enterprise 2.0**

The best assets are identified through a collective intelligence approach to asset rating and social bookmarking to link to the MIKE2.0 standard.

Download the open source omCollab product for Enterprise 2.0 to integrated to MIKE2.0 and build your own collaborative environment.

Each company sets up its own collaboration environment which securely holds its own content, linked to MIKE2.0.

**Recent examples of how MIKE2.0 and omCollab have helped organisations**

<table>
<thead>
<tr>
<th>Client</th>
<th>How MIKE2.0 helped</th>
</tr>
</thead>
<tbody>
<tr>
<td>e-Channel Transformation for a UK high street bank</td>
<td>The client wanted to enable the concept of a Bank 2.0 – a conversation with the customer through the online channel. MIKE2.0 was used to develop the future-state internet channel architecture for the credit card division of a UK high street bank.</td>
</tr>
<tr>
<td>Collaborative Business Intelligence strategy for a central government client</td>
<td>The client is responsible for children’s well-being, safety, protection, care and health, education, parenting, family welfare and child poverty. MIKE2.0 was used to help create the overall vision and case for change for a collaborative business intelligence solution.</td>
</tr>
<tr>
<td>Enterprise Information Management Strategy for a European postal company</td>
<td>The client is the state postal company in the process of market liberalization and undergoing major change. MIKE2.0 was used to develop the overall Enterprise Information Management strategy, including a data governance assessment using IM QuickScan.</td>
</tr>
<tr>
<td>Data-driven IT Transformation for a leading media company</td>
<td>Media industry changes caused the client to undertake a major business transformation. The MIKE2.0 xBR approach was used to deliver an &quot;IT Blueprint&quot;, defining the strategy through 2011.</td>
</tr>
<tr>
<td>BearingPoint’s own Enterprise 2.0 Strategy and Implementation</td>
<td>BearingPoint used omCollab to develop its own Enterprise 2.0 solution: the approach makes use of the collaborative, user-driven content built using Web 2.0 techniques and technologies on the MIKE2.0 site and incorporates it internally into the enterprise. It supports a 1000 person community and $400m of projects.</td>
</tr>
</tbody>
</table>
Join the community and get involved!

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<tr>
<td>Join the MIKE2.0 community at <a href="http://www.openmethodology.org">www.openmethodology.org</a></td>
<td>Download omCollab <a href="http://mike2.openmethodology.org/wiki/OmCollab">http://mike2.openmethodology.org/wiki/OmCollab</a> to quickly build Enterprise 2.0 mashups to MIKE2.0</td>
<td>Contact us: <a href="mailto:mike2@openmethodology.org">mike2@openmethodology.org</a> to find out more about MIKE2.0, omCollab or for a free benchmarking assessment</td>
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www.bearingpoint.co.uk
MIKE2.0 omCollab WIKI Demo

The open source standard for Information Management

A brief tour of the MIKE2.0 Wiki

Mark Burnett, Andreas Rindler

omCollab is a key element of enabling the integrated content repository

The standard provided by MIKE2.0 links to the best IM assets on the web and within companies that link their internal approach and knowledge to the open standard in order to quickly integrate MIKE2.0 with internally-held assets.

Web 2.0

MIKE2.0 provides a common competency for information management. It’s a single standard that is open to anyone.

MIKE2.0 is housed within an open methodology framework that balances stability with innovation.

Community members use social networking technologies to share experiences and build relationships.

Information Management assets on the web

The best assets are identified through a collective intelligence approach to asset rating and social bookmarking to link to the MIKE2.0 standard.

Enterprise 2.0

Download the open source omCollab product for Enterprise 2.0 to integrated to MIKE2.0 and build your own collaborative environment.

Each company sets up its own collaboration environment which securely holds its own content, linked to MIKE2.0.
The five phases of MIKE2.0

Navigating the solution areas
Why is a Comprehensive Approach Required for Data Quality Improvement?

5 Key reasons organisations fail to deliver appropriate data quality

- Our Systems are more complex than ever before
- Silo-ed, short-term project delivery focus
- Traditional development methods do not give enough focus to data management
- Data Quality issues are Hidden and Persistent
- Data Quality is Not Fit for Purpose

A comprehensive data governance programme

- Overall vision for improvement
- Programmes aligned to business needs
- Governance and oversight
- Technology and Architecture

- Processes and organisational change
- Data Quality Standardisation
- Data Quality Management
- Data Quality Strategies
- Data Quality Policies
- Data Quality Procedures
- Data Quality Metrics
- Data Quality Assessment

- Data Quality Improvement
- Data Quality Development
- Data Quality Technology
- Data Quality Architecture

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Data Quality Improvement

(Executive Summary)

Executive Summary

The 0-100 DQ index is a single number used to rank the quality of your data. It is generated by our software and is a measure of the accuracy, completeness, and timeliness of your data. The index ranges from 0 to 100, with 100 being the highest quality data. The index is calculated based on a variety of factors, including the number and type of data errors, the frequency of data updates, and the consistency of data across different sources.

Data Quality Improvement

Through our MIKE2.0 data quality improvement solution, we can help you improve your data quality and reduce the cost of data errors. Our solution includes a variety of tools and processes that can help you identify and correct data errors, as well as improve data consistency and completeness.

Data Quality Improvement

Our MIKE2.0 solution is designed to help you improve your data quality and reduce the cost of data errors. By implementing our solution, you can expect to see improvements in your data accuracy, completeness, and timeliness, which will ultimately lead to improved business outcomes.
Data Quality Improvement (Solution Offering Purpose)

Solution Offering Purpose
This is a Core Solution Offering. Core Solution Offerings bring together all assets in MIKE 2.0 relevant to solving a specific business and technology problem. Many of these assets may already exist and as the suite is built out over time, assets can be progressively added to an Offering.

A Core Solution Offering contains all the elements required to define and deliver a go-to-market offering. It can use a combination of open, shared and private assets.

Solution Offering Relationship Overview
MIKE 2.0 Solution Offerings provide a detailed and holistic way of addressing specific problems. MIKE 2.0 Solution Offerings can be mapped directly to the Phases and Activities of the MIKE 2.0 Overall Implementation Guide, providing additional context to help understand the overall approach. The MIKE 2.0 Overall Implementation Guide explains the relationships between the Phases, Activities and Tasks of the overall methodology as well as how the supporting assets tie to the overall methodology and MIKE 2.0 solutions. Users of the MIKE 2.0 Methodology should always start with the Overall Implementation Guide and the MIKE 2.0 Usage Model as a starting point for projects.

The MIKE 2.0 Data Quality Improvement Solution Offering is part of the EDM Solution Group.

Data Quality Improvement (Solution Offering Definition)
Data Quality Improvement (Mapping to Data Governance Framework)

Relationship to Enterprise Views

The MIKE2.0 Solution for Data Quality Improvement covers all areas of Information Development, across people, processes, organization, technology and strategy. Data Quality Improvement rapidly avoids the implementation of systematic procedures and methods, staff skills development, organizational strategy and new technologies. In order to improve data quality across an organisation, enforcing Information Development concepts is crucial.

Mapping to the Information Governance Framework

The Information Governance Solution offering is spread across all Solution Offerings. For Data Quality Improvement, this is particularly important in that governance standards and policies drive requirements for data retention and protection. Changes to these policies can lead to major re-work: policy or process issues can lead to major risks for the business.

MIKE2.0 provides a comprehensive approach for Information Governance that is defined in the Information Governance Solution Offering and refers to the general approach for “Information Development”. We believe that organizations have traditionally not given enough focus to this area and hence face many of the problems that they do today. MIKE2.0 provides an approach to implement a Data Governance Programme that is very comprehensive in its scope and is aligned to addressing a number of other business problems which all generate data management problems.

Experience has shown that the more thorough the Data Quality initiative the greater the need for a well-defined governance framework. A Data Governance Council is critical for the successful implementation of a Data Quality Improvement programme, an example of how a governance structure should look and the responsibilities it centres can be seen in the figure above.
Data Quality Improvement
(Measuring Data Quality)

Measuring data quality is a key success factor for the long-term sustainability of your DQ initiative. Funding for people, process and technology investments must be driven by real Return on Investment. Typically, organisations do not only measure using quantitative dimensions, but also include soft/intangible dimensions to justify their investment and measure success. Defining data quality KPIs measures an entity of organisational support, governance and accountability, processes, policies and standards, as well as an overall support (either automatically or by analysis from members of the data governance team) by a set of tools. The following diagram outlines an approach to measuring data quality.

- A quantitative approach to measuring data model complexity is detailed in Small Worlds Data Transformation Measure
- Information Maturity can be assessed and measured using the Information Maturity QuickScan approach.

Also see Data Governance Matrix.
Data Quality Improvement
(Mapping to the SAFE Architecture)