Tips for Building a Data Governance Guidebook

A data governance guidebook should be the go-to spot where employees can reference anything regarding data, definitions, process outlines or business rules. This should be a comprehensive look at all the ins and outs of your organization's data processes – so be sure to include anything that may be of use!

Whether you're updating an old data governance guidebook or taking on the project for the first time, here are some tips and tricks to help you along the way.

Getting started

☐ **Have everything in one place**
This should be a comprehensive document that your data, analytics, agency and development teams can refer to when needed.

☐ **Set aside plenty of time**
Building a data governance guidebook can be a big undertaking, but it's worth it in the long run. The length of the project will vary depending on the assignee's other responsibilities and experience with your organization.

☐ **Make it easy to navigate**
Use headers and clear formatting to make the document searchable.

☐ **Limit editing rights**
This document should be easily accessible to all of your team members – but that doesn't mean they should all have editing rights. Share in view-only mode with everyone but the person or team who is responsible for keeping the guidebook up to date.

☐ **Note updates and changes**
Depending on your organization's size, you may need to make frequent updates to your guidebook. To avoid confusion, note all changes with the date they were made and keep a log at the beginning of document.

☐ **Review annually**
Set aside time each year to review your data governance guidebook for any outdated information.

Building the guidebook

☐ **Include a basic organizational overview**

Start off your guidebook with an overview of your organization. This should include basic information like:

- o Mission statement
- o Fiscal year definition
- o Vendor or agency partnerships
- o Current challenges
- o Goals for the future

☐ **Add a data overview**

This overview should be less focused on the basics of your organization, and more focused the details surrounding your data.

- o Data management tools
- o Campaign estimated volumes
- o Data mapping
- o Data hygiene

☐ **Provide a channel summary**

Next, list all of the current channels your organization uses. Include any details on your direct marketing program, including mail schedule, variable tables, gift sizes and types of mailings. Break down your digital channels, too. Include any seasonal peaks, media calendars, email frequency and social channels.

☐ **Outline your business rules**

This is an important piece to any data governance guidebook. Business rules should get down the nitty gritty of how you handle the processes surrounding your data. This includes, but is not limited to, details on coding, segment definitions and gift array instructions.

☐ **Include a section on reporting, analysis and business intelligence**

Walk through how you handle recurring reports, custom reports and any other data analysis your organization does.

☐ **Mark emergencies**

Note dates of spikes in giving due to emergencies. When you go back to review data, this will help explain any anomalies seen.

The important thing to remember is that a data governance guidebook should be an extensive resource for anyone who works in or with your organization. It can be a time-consuming project to complete, but if carefully updated and maintained, a data governance guidebook is an extremely useful tool as you begin your journey to a data-driven future.