
Data Governance Journey at West Bend Mutual Insurance Company

DAMA Meeting

3/2/2017

- Background on West Bend Mutual
- DG basics
- Journey to date
- Next steps for West Bend Data Governance
- Challenges
- Q&A

West Bend Mutual Insurance Company - History

- Formed in 1894 - First policy was for West Bend Brewing
- 1930's and 1940's – Started writing policies in IL, MN, IN and IA
- 1957 – Premiums of 2.1 million, assets of 1.7 million
- 1960 – New headquarters downtown West Bend
- 1991 – Company moves to current location
- 1999 – NSI profit center is added in Middleton WI
- 2003 – 1 Billion in assets
- 2008 – Addition to home office
- 2010 – Argent profit center is added
- 2015 – Company reaches 1 billion in written premium

West Bend Mutual Insurance Company - Today

- Doing business in 11 Midwest states – WI largest state for premium
 - State expansion plan in progress
- Comprised of four strategic profit centers
 - West Bend Personal Lines – 5 states
 - Home and Highway
 - West Bend Commercial Lines – 6 states
 - Standard commercial risks
 - NSI – 10 states
 - Specialty products and bond
 - Argent – 4 states
 - Monoline Workers' Compensation
- 1200 Associates
 - Three office locations – all in WI
 - Associates working out of their homes
- Distribution is 100% through independent agents



West Bend – Strategic Initiatives

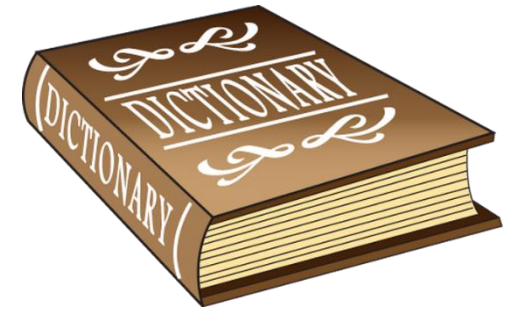
- Replacing core policy administration system (PAS)
 - Began in 2011 with planning
 - Release 1 - Commercial lines (3 strategic profit centers)
 - First state went live in April of 2014
 - All active policies on new system July 2016
 - Release 2 - Personal lines requirements in flight
- Develop and build an EDW
 - Release 1 - Concurrent with PAS project
 - Enterprise reporting for both commercial and personal lines
 - Detailed reporting for Commercial lines
 - Incorporated data from both the legacy and new PAS system
 - Release 2 – Requirements will begin shortly
 - Applying lessons learned from Release 1
- Strong support for both PAS and EDW from the enterprise

Data Governance - Policies and Processes

- Policies are critical
 - Require you to define what you are trying to accomplish
- Processes
 - Have to support your standards
 - Must define who is doing what
 - Often must include resolution processes
- Examples
 - Term Definition
 - Business Intelligence
 - Data Classification
 - Balancing
 - Reference Data

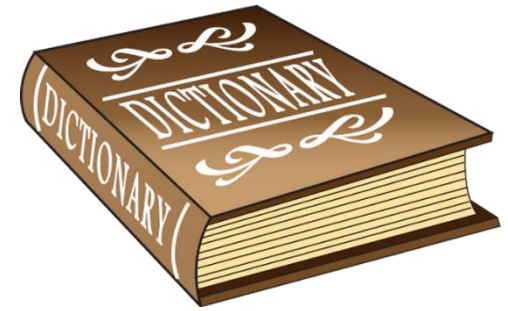


Business Glossary



- Very typical starting point for companies
- Usually driven by need for common language
- Determine your audience
- When starting
 - Determine scope – report terms, source terms
 - Develop processes
 - Establish roles and responsibilities
 - Work on related terms together if possible
- As you continue
 - Refine processes as needed
 - Continue to look ahead
 - Develop naming standards, approved abbreviations etc.

Business Glossary - Maturing



- Tool maturity
 - Vendor tools available
 - Needs to fit into your DG strategy and roadmap
- Other options
 - Incorporate valid values for key dimensional values
 - Link to use case documents
 - Link to calculation chains and how terms fit together
- Adding functionality means adding maintenance efforts

Role Structure at West Bend

- Data Governance Specialist
 - Owns DG assets
- Enterprise Power User (EPU)
 - Works in DG organization
 - Aligned to a functional area
 - Help inforce DG policies
 - Support report enterprise report delivery platform
- Business Power User (BPU)
 - Works in a functional area
 - Supports associates in their area
 - Ad hoc query support
- Data Stewards
- IT
 - BI developers
 - ETL resources



Data Governance Journey at West Bend

- PAS/EDW sponsor group recognized the need
- 2012
 - Steward group started to meet
 - EDW project created new roles – DG and BI roles
 - First DG associate hired
 - Business Glossary developed
- 2013 - 2017
 - Focus on supporting EDW
 - Work done on
 - Reference data management
 - Certification process for reports
 - Data lineage
 - Other items

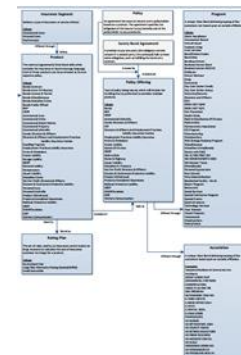


Business Glossary

- Term definition part of our BI standards manual
- Data Stewards meet on a regular basis
- Intake process defined
- Educated Business Analysts on what is required
- Published on report delivery platform
- ~1200 terms currently approved and published
 - Metadata captured for every term
- Key subset of elements create Enterprise Data Framework
 - Included enterprise valid values
- Owned and maintained by DG specialist

Reference Data Management

- Key focus is the enterprise data framework
 - Data stewards approve new items
- Other elements
 - Maintain values and mappings
 - Publish mappings
 - Data steward defines values
- Owned and maintained by DG specialist



Information Asset Catalog

- Inventory of all reports and data feeds
- Metadata around each asset
- Used to identify decommissioning opportunities
- Leveraged for report delivery platform
- Owned and maintained by DG specialist



DG Certification

- Executed by an EPU
- EPU is typically engaged with project
- Done on all new reports as well as revisions
- Standards defined in standards manual
 - Header/Footer
 - Column headings
 - Report performance
- Completed during user acceptance testing



Result:

- Common user experience
 - Similar feel from report to report
- Consistent use of terms/definitions
- Creates confidence in data

The road ahead

- Support for future EDW releases
- Continue BI community support
- DG metrics
- Data lineage maturity
- Self-service policies
- Data quality focus



Successes/Challenges

Successes

- Basic data stewardship in place
- Business Glossary/Enterprise Data Framework
- Common user experience (reports)
- Certification process

Challenges/Opportunities

- DG function vs. BI function
- Progress on data lineage
- DG metrics maturity
- DG vs technical standards



Questions