ZOHO **for Enterprise**

Data governance as an enabler of **self-service** BI

Evolving the definition of data governance for modern enterprises offers opportunities for improved data literacy and increased ROI.

Self-service BI has ramped up dramatically in recent years. In 2020, 62% of businesses deemed it essential to their operations,[1] and that importance has only grown. With the vast quantities of data that mid-market and enterprise-level organizations are crunching on a daily basis, development in the BI and analytics space is focused on offering self-service functionality at scale. The goal is to enable higher quality customer experiences through targeted, data-backed strategies that international teams can build, implement, and measure on their own.

> **82%** *of data-management decision-makers find it difficult to forecast and control data costs.*
>
> **[Forrester, 2022]**

Unfortunately, these efforts are being stunted by ineffective data governance. The rise in shadow IT illustrates that employees are increasingly seeking value outside their organization's BI setup in order to drive value for customers. Self-service data solutions are evolving and scaling, but the same cannot be said for the policies and procedures that manage them. And trying to apply traditional governance techniques to modern, self-service BI tools has led to major challenges, such as an over-reliance on IT teams, a lack of org-wide data literacy, low data visibility, and ROI loss from ad-hoc data solutions.

[1] Forbes, 2020

To address these challenges, organizations are beginning to create scalable data governance strategies that are agile enough to complement self-service BI. This new approach redefines data governance as a collaborative system of policies, processes, and teams designed to drive data insights into the hands of the people who need them most. This evolution mitigates the organizational pain points of traditional data governance, and tends to reduce shadow IT, boost customer experience, and increase connectedness across mid-market and enterprise organizations.

Challenges of IT-centric data governance

For some organizations, modernizing data governance strategies means completely redefining their goals. Governance used to revolve around "command-and-control" protocols, in which centralized IT teams set organizational standards for how employees should engage with and use corporate information.[2] Even though data governance has become

more expansive in recent years, there is still an expectation that IT teams will carry the burden of implementing policies and procedures that ensure data is being put to the best and safest use.

As companies collect more data, this over-reliance on IT teams does not scale well. Governance operations such as adhering to regulatory standards, consolidating data to prevent inconsistencies or errors, and enabling self-service reporting and analytics, have become larger tasks—only a fraction of which IT is best suited to oversee. Many organizations with successful self-service BI infrastructures have created localized data teams to decentralize these initiatives. This has the potential to allow teams to access higher quality data, take only the information they find relevant, and create targeted data solutions more quickly than before. Unfortunately, this has run organizations headlong into their next big hurdle: data literacy.

Only:

21%

of employees feel confident in their data literacy skills

32%

of executives feel they can create measurable value from data

[Accenture, 2020]

Supporting data literacy through agile governance

In 2021, Deloitte advocated for data governance to take after agile methodologies through straightforward policies that act as "guardrails instead of bureaucratic hindrances."[3] Some organizations have done this by creating a centralized data governance team that outlines data collection and preparation standards that apply to domain-level data repositories. Instead of prioritizing compliance and risk mitigation above all

[3] Deloitte, 2021

else, which resulted in too little data accessibility for employees, this approach recognizes that accessibility is essential to drive effective data-driven decision-making and prioritizes improving the quality and usability of the data itself.

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The momentum towards self-service cannot be stopped, so accessibility should be prioritized. If a governance team works with IT on assigning appropriate roles and permissions, employees can have faster access to ready-to-use data in a way that doesn't sacrifice security.

- Saravanan Muthian, Chief Information Officer at Zoho

Reducing the barrier to entry for employees to access and produce trustworthy insights from data will naturally increase data literacy.

This approach can also act as a powerful enablement tool for data leaders across an organization. When agile governance is coupled with a robust feedback system, it allows data leaders to quickly recognize domain-specific literacy gaps amongst employees and request the tools and training materials from the governance team that will drive the most value.

Challenges of low data visibility

No-code and low-code tools have made data analytics more accessible to the average employee, but they have also revealed and exacerbated the challenges that traditional data governance started. As organizations attempted to move relevant information closer to the teams that would use it, data became fragmented between the preferred storage systems of individual regions or teams, creating data sets and tools that are either repetitious, single-use, or both.

This has the potential to lead to ROI losses from self-service BI. 82% of decision-makers find it difficult to forecast and control data costs because there is no org-wide visibility

into all the data and tools their teams are using, and 80% find it a challenge to govern their data at scale.[4] Not only does this mean that many organizations are unable to create realistic budgets based on data solutions that drive the most value, but the security risks that shadow IT poses extend to in-house solutions that have little to no oversight.

Improving data findability through centralized data cataloging

Data repositories have become pivotal for organizations looking to consolidate their dispersed data assets, but at a certain scale, even a centralized data repository inhibits data visibility and self-service BI. If repositories act as consolidated data storage, then a data catalog is the

[4] Forrester, 2022

directory that helps stakeholders pull specific information from that storage. This enables separate business domains to manage their data assets in a localized repository without those tools becoming siloed from the rest of the organization.

The metadata stored in data catalogs is especially key. It communicates whether certain information is sensitive, private, or protected, and it also categorizes data based on how it was collected and what it may be used for. For governance purposes, these metadata records act as documented proof of all the ways in which an organization's data has been moved, used, or changed, improving the security and trustworthiness of data and making org-wide information easier to manage at higher volumes.

On their own, these benefits boost the ROI of self-service BI by creating more awareness within organizations of where data is located and how it's being used. However, data catalogs also ensure that organizational information follows the FAIR data principles: findable, accessible, interoperable, and reusable.[5] These principles help promote data sharing and reuse as a means of generating more collaborative research opportunities and even greater ROI potential.

Designed for data visibility

A data catalog is only as strong as its integration with the low-code data tools and repositories that an organization uses. Zoho's custom solutions platform, Zoho Creator, acts as a secure and centralized hub for enterprise-level data solutions, and it's natively integrated with our powerful BI suite for simplified data cataloging, preparation, and analysis.

[5] Vericad, 2019

Driving value in self-service BI

Traditional data governance techniques provided obstacles to self-service BI, acting as a bottleneck for real-time insights, blocking visibility into org-wide data, and pushing employees toward shadow IT as a means of getting around overly stringent and unnecessary policies. Modern data governance has flipped that stereotype on its head, playing an essential role in educating teams about best data practices, providing tools and guidelines to help self-service BI objectives, and ensuring data is as high-quality and trustworthy as possible. Without this governance, self-service analytics projects risk developing inefficiencies that impact not only organizational decision-making, but also the company's entire bottom line.
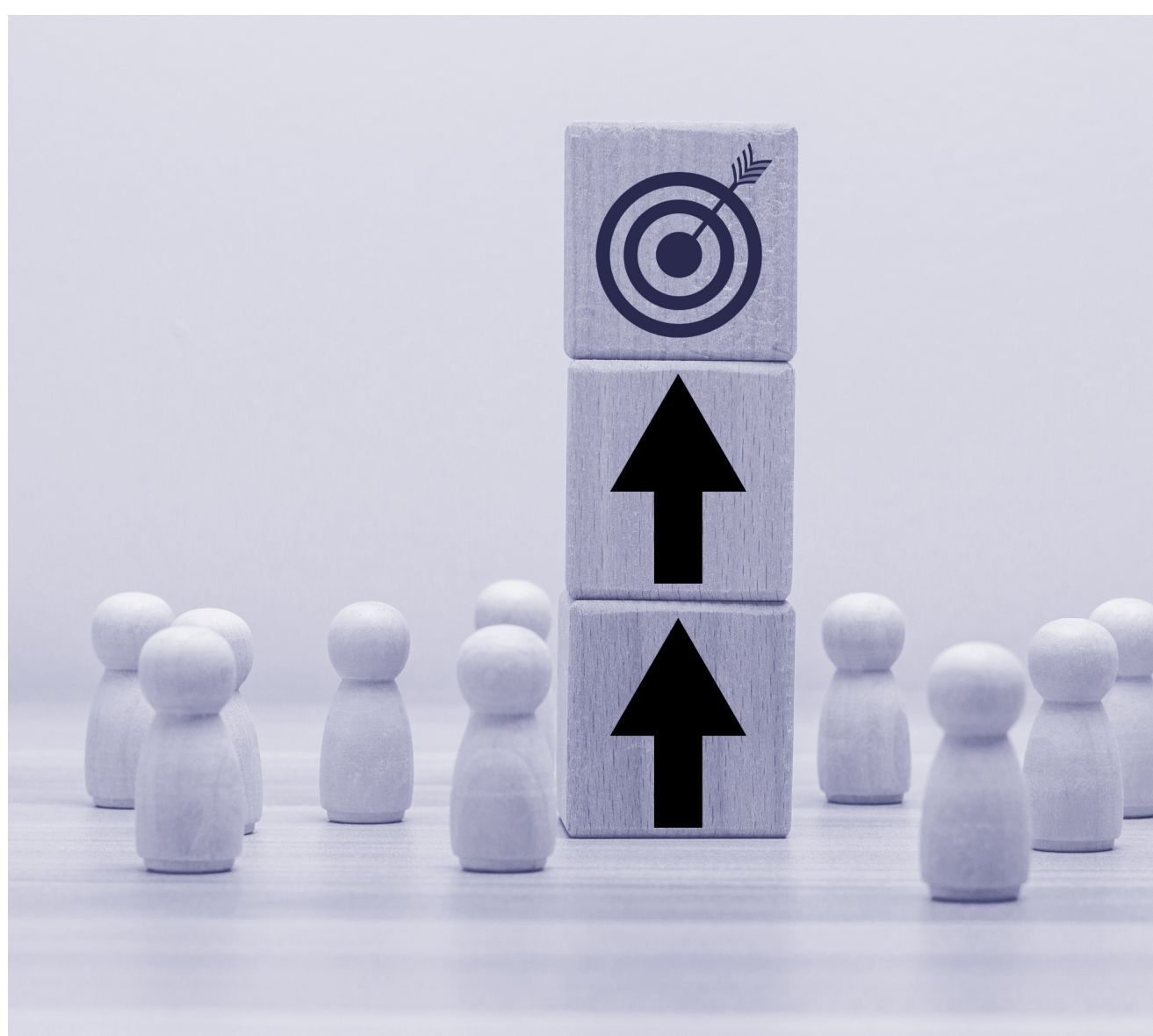
As self-service BI expands to become the norm of mid-market and enterprise businesses around the world, there is a growing movement toward data empowerment for employees.[6] Organizations have already seen how providing teams with real-time access to data has improved their business operations. Data governance completes this vision by ensuring that, no matter the amount of data a company collects, it remains accessible, high-quality, and ready to be transformed into secure, value-driving solutions.
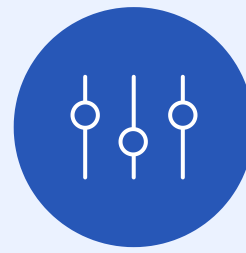

[6] Forbes, 2022

Why Zoho for Enterprise?

Proven software, customer commitment, tremendous value.
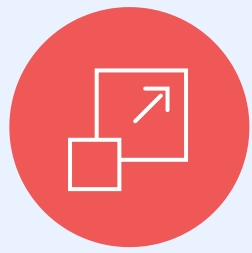
Scalability & Reliability

Zoho for Enterprise reduces the cost of infrastructure, unifies existing apps, and solves complex business problems for increased enterprise fitness, resilience, and scalability.

Customization & Extensibility

Through granular customizations and powerful in-house developer platforms, Zoho lets you orchestrate workflows, streamline data management, and deploy world-class solutions at scale.

Security & Privacy

From owning our own data centers to GDPR compliance features, Zoho enables enterprise organizations to focus on core business priorities, rather than data management.

Enterprise Services

From data migration to consultation and implementation, our team is armed with the in-depth product knowledge and industry expertise to meet your unique technical requirements.

Are you ready to transform your organization?

We're here to help. Have a 15-minute, no-obligation call with one of our **Business Architects** to get all your questions answered.

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