

What a Chief Data Officer Needs to Know

Kurt Brenneman

Increasingly, organizations are hiring a chief data officer (CDO), often a new face in the C-suite, to focus on data and only data, including its ethical use.

The CDO's immediate mandate is fixing data problems. Later, the CDO uses data skills to help the organization get more value from its data. Caroline Carruthers and Peter Jackson wrote *The Chief Data Officer's Playbook* for new CDOs and hiring organizations to resolve confusion about what a CDO does.

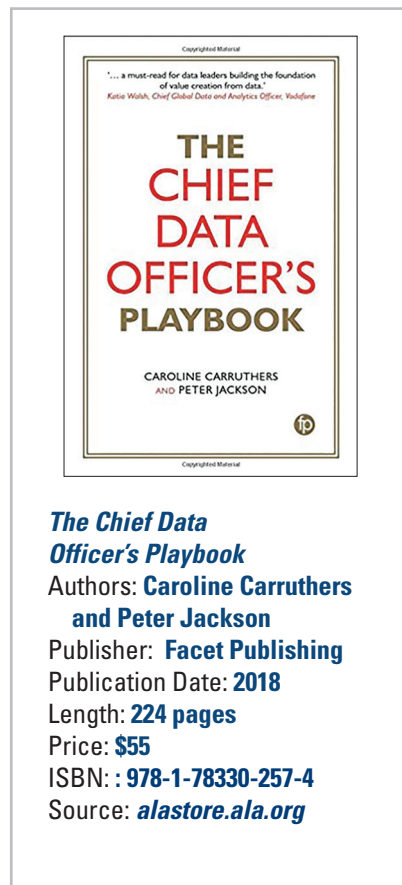
Carruthers and Jackson, first-time CDOs themselves, based the *Playbook* on their own experiences and on battle stories shared by the small, supportive community of CDOs.

Communication, Coffee, and Cake

According to the authors, the CDO must be a master communicator and win “hearts and minds.” The CDO translates complex data concepts and describes the new “data utopia.” The CDO listens and learns about the organization and its data. The authors’ suggestions for winning hearts and minds are practical, including “the power of coffee and cake” to help employees relax and share their data concerns.

The authors’ recommended “multi-hub and spoke model” of communications is familiar to information governance (IG) professionals. It is an effective model for anyone in a new role trying to change the management of information. The CDO’s team is the hub of best practices. Spokes extend outward to voluntary *information champions* – those who have a passion for data – within business units. These champions are mini-hubs with spokes out to colleagues.

According to the authors, an IG professional often begins with the establishment of such a network of



The Chief Data Officer's Playbook

Authors: **Caroline Carruthers and Peter Jackson**

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information champions. The danger, they say, is that this network grows stale. The *Playbook* has pragmatic steps for sustaining engagement. What works best? For Carruthers and Jackson, it is celebration of data successes, supported by skilled marketing tactics.

Through the Generations

According to the *Playbook*, a CDO is either “first-generation” or “second-generation.” The *first-generation CDO* builds a foundation for data management and “demonstrates what can happen when you start to treat your data as an asset and understand its potential.” The *Playbook* includes plans for the first 100 and 300 days and how quickly to make the case for a major data revamp.

Data governance is a cornerstone

of this foundation. To Carruthers and Jackson, *data governance* is “the processes and framework which ensure that important data assets are managed properly.” An enterprise data governance framework is an early deliverable for the CDO.

Carruthers and Jackson propose a useful outline for a framework and add a timely discussion of the European Union’s General Data Protection Regulation’s impact. The *Playbook* lacks analysis of existing frameworks such as The DGI Data Governance Framework of the Data Governance Institute, ISO 8000, and ARMA International’s Generally Accepted Recordkeeping Principles®.

The *second-generation CDO* takes on the challenge of helping an organization derive new value from its data. As the CDO becomes more common in the C-suite and tenures lengthen, Carruthers and Jackson may consider a playbook for the second-generation CDO.

The Big Picture

The *Playbook* devotes a chapter to the development of a data strategy and another to managing expectations by delivering incremental value-add. The authors recommend having an *immediate data strategy* (IDS) for fixing problems and getting quick wins and a *target data strategy* (TDS), which involves planning for the major data revamp. The *incremental value-add* is to deliver both strategies in small, carefully selected chunks.

IG professionals may experiment with this dual approach. In her book *Records and Information Management*, Patricia Franks notes that a strategic plan for a records management program covers “a three- to five-year period.” This is the TDS. A concurrent IDS is for quick, smaller successes that are marked by celebrations that create momentum for the TDS.

Data Ethics in the News

Having written this book prior to Facebook Inc.'s revelation that it had sold users' data without their permission to political consulting firm Cambridge Analytica, the authors wisely gave data ethics its own chapter. The CDO, they assert, is responsible for the organization's ethical use of data. They acknowledge that this responsibility is difficult, but that it only means CDOs must consider the ethical aspects of data decisions and monitor their consequences. It is hoped that the authors will publish additional research on data ethics.

Useful for a Wide Audience

The Chief Data Officer's Playbook is a pragmatic, nontechnical manual, recommended for new and experienced CDOs. For example, a chapter on treating an organization's data hoarding is based on the psychological therapy for people who hoard their possessions. The *Playbook's* list of characteristics of a good CDO also is recommended to organizations hiring a CDO. The authors include a glossary of technical terms. A future edition would benefit from a list of Internet-based resources for staying current.



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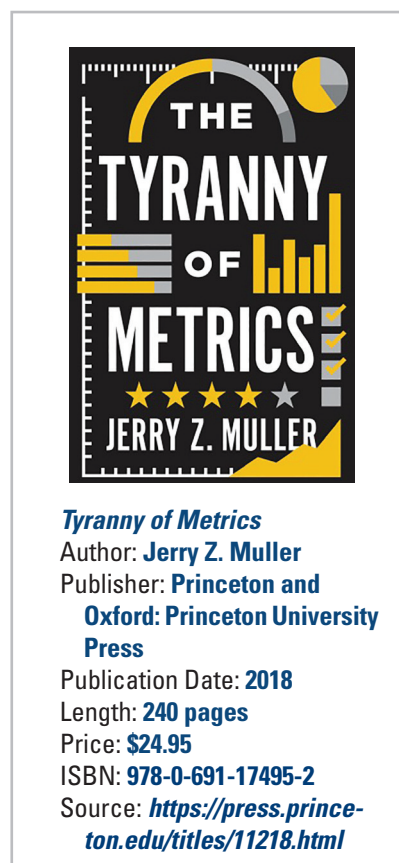
Tempering Our Number Fixation with Good Judgment

Lara Mancuso, Ph.D.

During his tenure as chair of the history department of the Catholic University of America, Jerry Z. Muller, whose research focuses on the history of capitalism and public policy, met with increasing demands to provide statistics to measure the performance of his department. Not only did these requests take time and effort away from research and teaching, but how and if the documentation produced was used by university administration to actually improve the quality of higher education was not clear to him. Hence, the inspiration for *The Tyranny of Metrics*, his critique of the inappropriate and excessive use of quantitative assessment.

The Good, Bad, and Inaccurate

Drawing upon literature from multiple fields to analyze case studies from education, health care, law enforcement, the military, businesses, and non-profits, Muller shows that when properly combined with personal experience and knowledge, and when aligned with professional values, metrics can support the identification of outliers (e.g., to single out



misconduct) and the establishment of efficient standardized procedures for routine tasks (e.g., checklists in aviation).

However, when used without judgement or used to reward and punish professionals, quantitative indicators are inadequate at best and counterproductive or even life-threatening at worst, as his examples from health care reveal. Muller shows how the inappropriate use of metrics takes away time from tasks that really matter; discourages risk-taking, innovation, and cooperation in the workplace; and can induce professionals to manipulate data by avoiding assignments that might have a negative impact on indicators, by deliberately lowering standards and benchmarks, and by omitting information, among other strategies.

In addition, ill-judged emphasis on numbers contributes to the misconception that things can be improved no matter what, with no consideration that sometimes a problem's solution lies outside of organizations. For example, poor student achievement in schools lies rather on social inequalities than on teacher performance.

Muller's account is engaging and convincing, and the main takeaways from the book are pertinent, current, and applicable to other fields: