

Client Logo

<Client Name>
Information Management Strategy

Version 0.1

<Date>

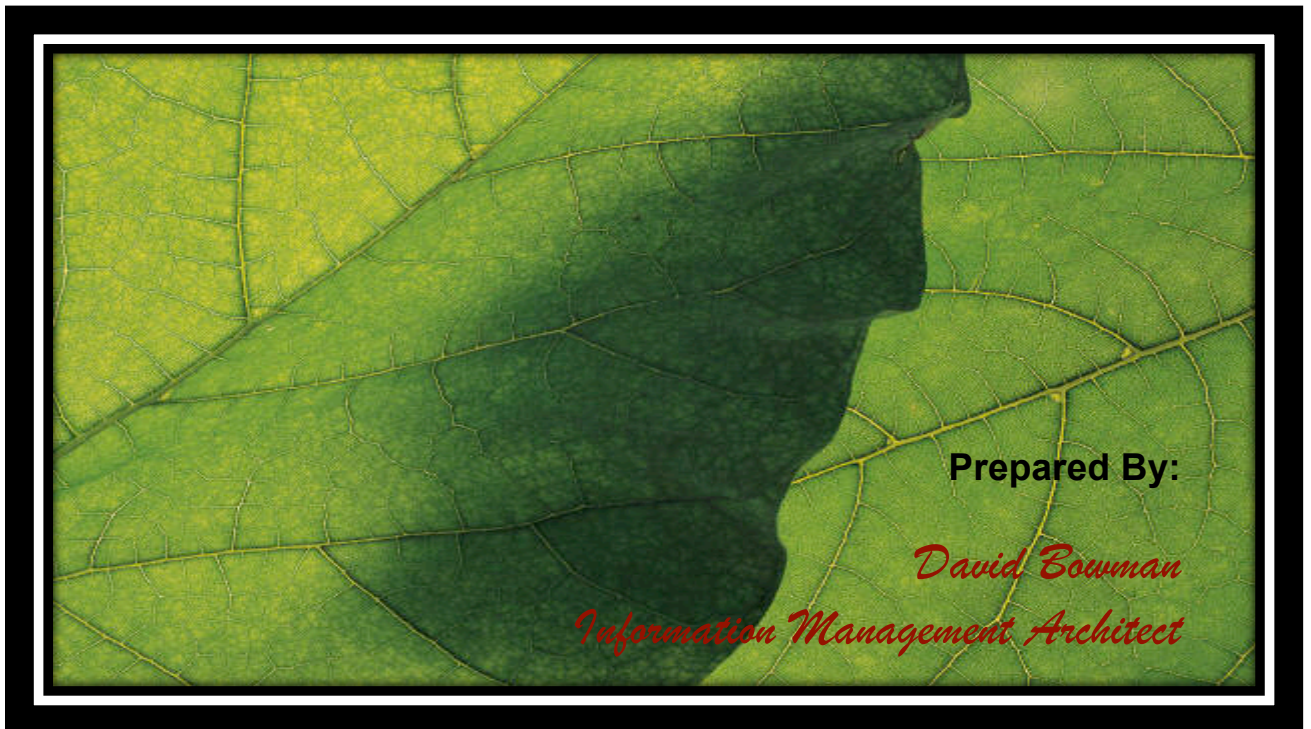


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1. Introduction

- 1.1. *Background to/Reasons for the Study*
- 1.2. *How to use this report*
- 1.3. *Terms of Reference*
- 1.4. *Variations To Terms of Reference*
- 1.5. *Project Constraints/Assumptions*

2. The Business Model

- 2.1. *Business Direction*
- 2.2. *Operational Concerns, Problems and Needs*
- 2.3. *Strengths, Weaknesses, Opportunities and Threats*
- 2.4. *Business Constraints*
- 2.5. *External Constraints/Deadlines*
- 2.6. *Internal Constraints/Deadlines*
- 2.7. *Technical Constraints*
- 2.8. *Business Aims and Objectives*
- 2.9. *Critical Success Factors*
- 2.10. *Key performance indicators*

3. Current Situation Assessment

3.1. Structure and Design

3.1.1. Conceptual Data Model

Include reference to Function Model

3.1.2. Information “Gaps”

Include an assessment of any obvious “Gaps” in meeting information requirements.

Include an assessment of “Gaps” any “metadata” needed to help manage the information management process

3.2. Data Storage

Include an assessment of:

- *Legacy Systems;*
- *Customer Relationship Management Systems; and*
- *Enterprise Resource Planning Systems*

Be sure to address any potential data movement issues between these systems and potential data warehouse solutions

Include reference to the Entity/Source System Mapping Document

Include an assessment of information and system architecture including”

- *Online Transaction Processing Systems (OLTP)*
- *Operational Data Stores (ODS);*
- *Data Warehouse(s); and*
- *Data Marts and other reporting/analytical environments*

3.3. Data Movement

Include an assessment of data movement into, within, and out of the organization.

Be sure to include an assessment of master data management and the movement of master data

3.4. Data Security

Include an assessment of information security. Be sure to include reference to backup/recovery in event of operational loss and disaster recovery in event of catastrophic events

3.5. Metadata

Be sure to include an assessment of metadata management, tools, skills and information “gaps”

3.6. Data Quality

Include an assessment of data quality.

Be sure to include reference to organizational capability to detect and prevent and correct quality issues

3.7. Project Management Methodology

Include an assessment of the software development life cycle.

Be sure to include an assessment of requirements analysis, data quality requirements and Quality Assurance throughout the life cycle.

3.8. Human Resource Strategy

Include an assessment of the information management roles and responsibilities.

Be sure to address:

- *Are roles and responsibilities consistent with information management requirements?*
- *Are they clearly documented and understood?*

3.9. Management Information Requirements

Include an assessment of the management information requirements.

Be sure to address:

- *Are requirements met by existing systems?*
- *Are new projects in progress?*

3.10. Business Intelligence Strategy

Include an assessment of business intelligence strategy.

Be sure to include an assessment of metadata management, tools, skills and information “gaps”

3.11. Change Management Strategy

Include an assessment of the change management and release management process.

Be sure to address if they are adequate for information management projects

3.12. Information Management Policies

Include an assessment of information management policies, standards and best practices.

Be sure to address:

- *Structure and design standards;*
- *Data Storage standards and best practices;*
- *Data movement best practices;*
- *Data Security policies and procedures;*
- *Meta data standards and best practices;*
- *Data quality policy and standards;*
- *Human resource policy and accountabilities; and*
- *Change management policy and process;*

Be sure to address any “Gaps” between exiting situation and desired situation

3.13. Data Management Strategy

Include an assessment of the data management strategy.

Be sure to address any “gaps” in:

- *Tools;*
- *Roles and responsibilities; and*
- *Policies, standards and best practices.*

3.14. Information Management Policy

Include an assessment of information management policies.

4. Information Management Strategy

4.1. Outline Solution

Discuss how the following will be implemented:

- *Information management framework;*
- *Data management framework;*
- *Project management framework;*
- *Human resource strategy;*
- *Change management methodologies;*
- *Business intelligence framework; and*
- *Release management*

These items should be addressed in sufficient detail to provide an overview of the overall Information Management Plan

4.2. Implications/Effect on Business and IT Department

Identify any changes that might impact the organization

4.3. Logical Dependencies

Address any implementation dependencies

4.4. Recommended Implementation Method

Discuss the recommended approach for implementing the information management recommendations

4.5. Hardware, Communications and Software Requirements

Identify any additional requirements

4.6. Metadata and Data Quality Support Considerations

Identify any organizational changes that might be required

4.7. Change Management & Control

Discuss how change management will be addressed

4.8. Configuration Management

Identify any changes required for configuration management

5. Information Management Plan

5.1. Planning Assumptions

Identify any key assumptions

5.2. Phasing

Identify how information management will be integrated into the organization

5.3. Development Schedules/Milestones

Describe the schedule and key milestones

5.4. Transition Overview and Issues

Address any concerns about transitioning to information management

5.5. Staff Requirements/Training Needs

Address any staff requirements and training required

Glossary

Provide a glossary of key terms and definitions.