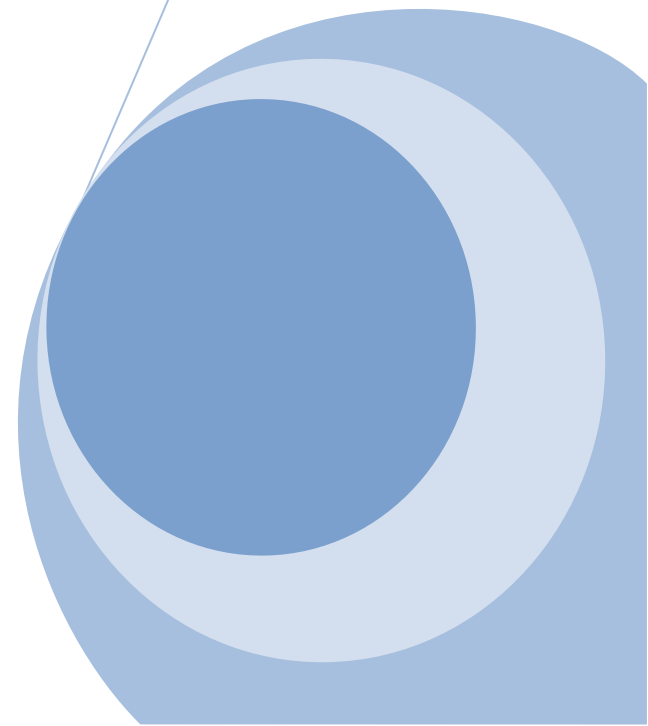


# **EWSolutions Data Governance, Metadata Management, Unstructured Data Management Case Study**

*Leveraging Enterprise Data Management Capabilities  
for Competitive Advantage and Improved Decision-  
Making*

Enterprise data governance strategy and implementation, data governance training, metadata management strategy and MME implementation, and unstructured data management supported efforts to expand a major Blue Cross / Blue Shield health insurance provider.

**EWSolutions, Inc.**  
**1/23/2017**



## **Enterprise Data Management, Data Governance, Metadata Management, Unstructured Data Management: A Case Study in How EWSolutions Supported Health Insurer's Expansion and Competitive Advantage**

Blue Cross and Blue Shield of Illinois traces its roots to the depths of the Great Depression and a group of Chicago business leaders who witnessed how relatively minor illnesses that required a hospital stay were ruining families financially. These business leaders saw terrible hardship in their community and they took action to alleviate it. In 1936, they pooled their own savings and launched a not-for-profit company called Hospital Service Corporation to offer an affordable pre-paid hospital plan, which was a new concept at that time. The Chicago Plan, as it was called, was one of the forerunners of what we know as health insurance today. The idea caught on and Hospital Service Corporation eventually became Blue Cross and Blue Shield of Illinois.

Today, HCSC and its companies are the largest and most experienced health insurance company in the state of Illinois, providing more than 6.5 million members with comprehensive and affordable health plans.



### **Acquiring additional health plans requires an enterprise data strategy**

At the start of the 21st century, HCSC acquired the insurance operations of several Blue Cross / Blue Shield affiliates in Texas, Oklahoma, New Mexico, and other states. These acquisitions left HCSC with a daunting collection of patient, provider, supplier, and other forms of data - all in differing formats across many diverse sources at numerous locations. Operations and decision-making were hampered significantly by this diversity, and the lack of knowledge of the data's context and quality added to the confusion for all levels of the organization.

Additionally, HCSC wanted to address the underlying enterprise information management challenges of enterprise data architecture, metadata management, data governance, knowing that having this unified approach would give them an optimal design and continued capabilities for their decision support and analytical needs. After having developed a data strategy, HCSC knew they had to partner with leading practitioners of data management for its implementation.

HCSC chose to retain industry leader [EWSolutions](http://www.ewsolutions.com) to evaluate its internally developed enterprise data strategy. The company requested that [EWSolutions](http://www.ewsolutions.com) and its expert consultants lead the design and development of an assessment of their enterprise data governance plan and their enterprise data architecture,

and to develop a strategy and implementation plan for metadata management. [EWSolutions](#)' team of experienced strategists and practitioners was able to provide the organization with exemplary advice, guidance, planning and execution strategies and recommendations for improvement in all the identified data management areas.

Additionally, [EWSolutions](#) developed and delivered customized training in enterprise data management, data governance and data stewardship, metadata management, and enterprise data architecture and modeling.

Finally, [EWSolutions](#) designed and implemented an unstructured data management program focused on HCSC's email and associated documents, based on industry standards and best practices.

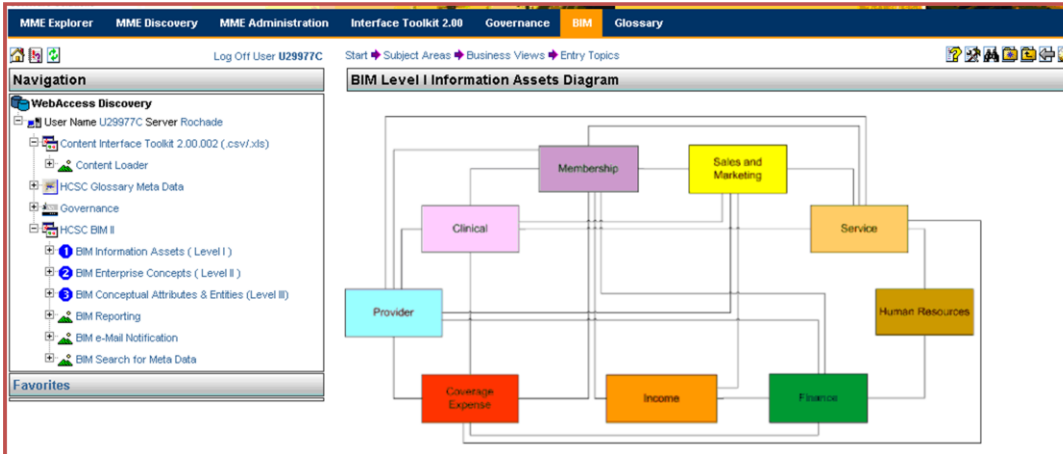
[EWSolutions](#) led the Managed Metadata Environment (MME) Prototype and Implementation project for this large health insurance organization. The central objectives of the MME Implementation project were to develop architecture and implementation plans to support the Information Governance and Stewardship (IG&S), the enterprise data governance program at HCSC. Specific contributions included:

- Assistance with final MME tools selection
- A recommended systems architecture for the acquisition, integration and delivery of HCSC meta data
- A strategy for maintaining and expanding the MME during its life cycle
- A set of meta data educational presentations focusing on MME fundamentals

Key accomplishments included:

- Assessment of HCSC's proof of concept MME with a recommendation to proceed with the MME tools selection.
- Assisted in the completion of the initial acquisition development process and procedures.
- Assisted in HCSC's MME systems architecture. This included a metadata landing area, staging areas for specific MME metadata sources, a validation area for MME content, and a production area.
- Prototyped the HCSC MME Glossary, a web-based WebAccess Discovery application.
- Prototyped the HCSC MME Information Value Chain for "Claim" and "Member" threads. This web-based WebAccess discovery application is a collection of value chain image pages with hotspots, discovery topics and queries that dynamically report sets of HCSC technical meta data
- Provided initial training and support for HCSC MME delivery developers on the fundamentals of WebAccess discovery topics and the creation of discovery applications.
- Completed initial MME content promotion checklists and application content promotion checklists that support promotion processes.
- Provided ad-hoc support for implementation issues, answering operational questions, and technical trouble-shooting.

The Managed Meta Data Environment (MME) provides easy access to HCSC's meta data in a web-enabled application.



Additionally, [EWSolutions](#) expertly guided HCSC in the use of its industry leading M3<sup>sm</sup> methodology for metadata management. The results of this methodology implementation included:

- Analysis of M3<sup>sm</sup> against current HCSC metadata management activities and practices
- Assessment of gaps between HCSC's metadata management practices and industry proven practices in M3<sup>sm</sup>
- Incorporation of M3<sup>sm</sup> stages, phases, activities, templates into an enterprise approach for managing metadata
- Incorporation of new method into selected metadata management implementation projects, starting with the development of a managed metadata environment

### Data Governance enables improved enterprise data management

As part of its enterprise data management initiative, HCSC planned the development and implementation of an enterprise data governance program. However, lacking sufficient knowledge of the domain, its best practices and processes, HCSC engaged [EWSolutions](#) to design an approach to data governance that would align with its enterprise data management initiative, use its managed metadata capabilities, take advantage of the enterprise data architecture efforts, and train HCSC staff in the best practices for data governance and data stewardship.

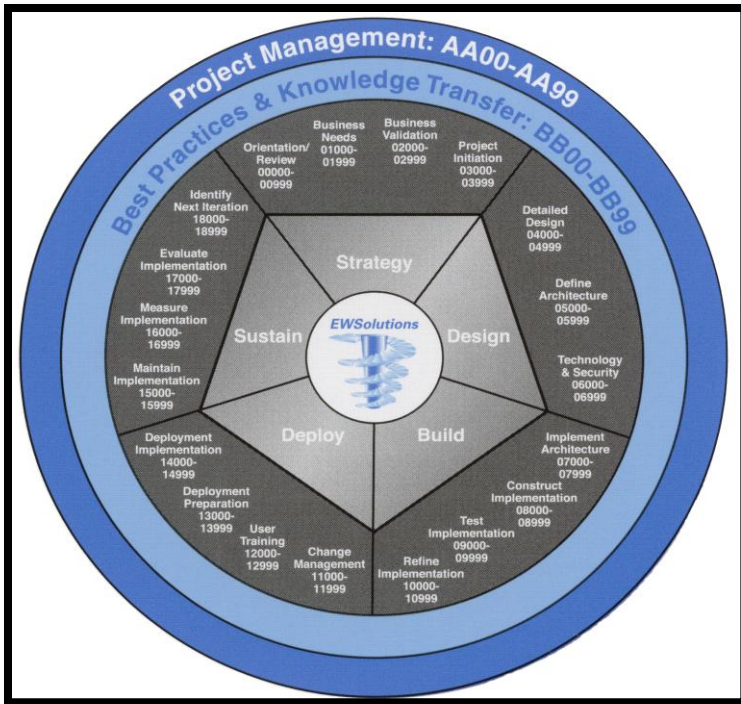
Goals of the HCSC data governance engagement included:

- How can HCSC effectively incorporate information and knowledge in order to adapt, to grow, and to develop as an organization?
- How can HCSC use information and knowledge to empower the company to make the best decisions?

Using senior resources from [EWSolutions](#), HCSC was able to answer these questions. EWSolutions designed the data governance program in conjunction with HCSC staff leaders, coordinated the implementation with team members from the MME and data architecture and data modeling units, designed and delivered data governance best practice training to all Enterprise Data Management team members, led the design for the data stewardship program development, and trained the initial three teams of HCSC data stewards.

Additionally, HCSC leadership requested an analysis of the entire Enterprise Data Management program. [EWSolutions'](#) senior consultants led and participated in the development of this analysis, wrote the comprehensive report, and presented the results to the senior leadership team with selected HCSC EDM team members.

## Methodologies enable more rapid assessment, development and implementation through best practices



**EWSolutions' M3<sup>sm</sup>** methodology for Metadata Management is a highly customizable, iterative, and workflow-oriented methodology designed to help your organization achieve enterprise metadata management success effectively. With hundreds of fine-grained tasks with clear objectives, success factors, and responsible parties identified, **M3<sup>sm</sup>** enables the development of a managed metadata environment with the proper processes, people, and technologies.

The methodology is based on **EWSolutions'** consultants many years of helping clients successfully realize outstanding benefit from their metadata management efforts. **M3<sup>sm</sup>** underscores **EWSolutions'** numerous award-winning efforts and thought-leading practices and supports integration with Enterprise Information Management (EIM), data governance, and data warehouse / business intelligence (DW/BI) efforts. **M3<sup>sm</sup>** is a self-sustaining, iterative, and customizable methodology that helps organizations to realize continuous return on investment (ROI) by identifying new business opportunities, improving efficiencies, and increased data quality through a metadata management program.

### Methodology Critical Points:

With highly customizable task narratives, templates, and examples, **M3<sup>sm</sup>** allows any organization to fit the methodology to its efforts, not the other way around. The methodology adds value to a metadata program without adding unnecessary complexity or unjustified efforts.

An iterative methodology with overlapping phases and activities, **M3<sup>sm</sup>** helps an organization anticipate and reduce risks within and across phases, providing strong validation of scope and results, while efficiently utilizing all resources, including time, personnel, funds, and effort.

The **M3<sup>sm</sup>** workflow provides discipline and manageability to any metadata management program. Developing a managed metadata environment can be very complex – using the **M3<sup>sm</sup>** methodology breaks the effort into manageable, measurable tasks to know the current state, target state, and next steps. With its clear success criteria and best-practice estimates, the methodology helps an organization achieve discipline and increase visibility to assess progress and identify needed adjustments efficiently and effectively.

Additionally, HCSC incorporated several aspects of [EWSolutions](#)' data governance methodology, [G3<sup>sm</sup>](#) into the engagement. [G3<sup>sm</sup>](#) is the industry's only comprehensive, iterative, scalable and flexible approach to developing and managing the complex discipline of data governance and stewardship. Combining the strategic, organizational and policy activities of data governance with the tactical and operational tasks of data stewardship, including maintenance, [G3<sup>sm</sup>](#) provides all the details any organization needs to ensure an effective implementation of the data governance process. Each stage defines the continuing parallel steps and iterative cycles necessary to deliver successful data governance and stewardship implementations. An organization can elect to implement both data governance and data stewardship, or choose to focus on one (data governance or data stewardship) without sacrificing any methodology continuity.

### **[G3<sup>sm</sup>](#) Methodology Critical Points:**

Including almost 140 narratives with additional templates, [G3<sup>sm</sup>](#) enables every organization to design, implement and maintain a successful data governance and data stewardship program regardless of the organization's scale or industry. These templates ensure that best practices and industry standards are followed for each activity and process throughout the methodology.

[EWSolutions](#)' unique, cookbook approach allows an organization to advance through each phase of the methodology at its own pace, adapting the methodology as needed while saving time and money by using a proven structure and plan for data governance and data stewardship.

## **Significant Accomplishments Provide Continuing Progress**

HCSC continued to implement its enterprise data strategy with the continued support of [EWSolutions](#), including managed metadata environment (MME) strategy/planning/architecture/implementation, enterprise data architecture and modeling, and enterprise data governance. Enterprise data management and unstructured data management capabilities were sponsored by senior leadership across HCSC, and the organization continues its enterprise data management efforts.

[EWSolutions](#) provided sustained guidance and advice informed by industry standards and proven practices, and led / directed several foundational projects during a critical period for HCSC.

## **EWSolutions Overview**

[EWSolutions](#) is comprised of superior strategic and tactical planning analysts who offer government and commercial clients innovative and authoritative solutions to assist with assessments / strategies in all areas of enterprise data / information management, technology implementation in metadata management, data warehousing (ETL, BI, data and text mining, etc.), business intelligence implementation, data governance program development and implementation, enterprise data management framework development and implementation, data migration planning, disaster and contingency planning, and strategic solutions for business/technology issues. The company's extensive client base spans the government and the health, life sciences, insurance, financial services, consumer products, retail, manufacturing, and high-tech industries. For more information on our strategic consulting services, high-value implementation services, methodologies, or world-class training call (630) 920-0005 or email us at [Info@EWSolutions.com](mailto:Info@EWSolutions.com)