

# **EW Solutions Data Strategy and Assessment Case Study**

*Leveraging Investments in Enterprise Information  
Management and Business Intelligence / Analytics*

Enterprise data management, data governance, metadata management, data warehousing / business intelligence, data integration, data security, master and reference data management combined to ensure the future of a 120+ year-old fraternal financial services organization.

**EW Solutions, Inc.**  
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## Leveraging Investments in Enterprise Information Management and Business Intelligence: A Case Study in How Enterprise Warehouse Solutions Enabled Competitive Advantage for Financial Services

More than a century ago, Thrivent Financial began helping Christians build solid financial futures and strengthen their communities. Today, the company serves more than 2.3 million members nationwide. A lot has changed over the years, but one thing hasn't: how the company blends faith, finances and generosity. Members have always been the heart and soul of the organization. Neighbors helping neighbors. People making contributions to their communities. A century ago, it took the form of barn raisings and church potlucks. These days, it's things like new construction projects through *Thrivent Builds* and responsive *Thrivent Action Team* events.

In the early 20th century, there was no social safety net. Back then, an accident or other misfortune could destroy a family's welfare. Congregations historically had come to the aid of people in need. However, by offering insurance contracts to Lutherans, the Aid Association for Lutherans (AAL) and Lutheran Brotherhood (LB) created mutual security where once there had been only individual risk.

Having shared similar missions and values for decades, LB and AAL merged in 2001, becoming Thrivent Financial for Lutherans. As a not-for-profit on the Fortune 500, the company now could support families and communities in more ways than they did as individual organizations.

In 2013, the members voted overwhelmingly to extend the common bond beyond Lutherans to include all Christians and to rename the company Thrivent Financial. This historic decision meant Thrivent would be able to help millions more people ***be wise with money and live generously***.

Thrivent continues its drive for managing finances faithfully and is committed to improvements in strategic and operational data management and business, ensuring that the next 120 years are as fruitful for the company as the first.



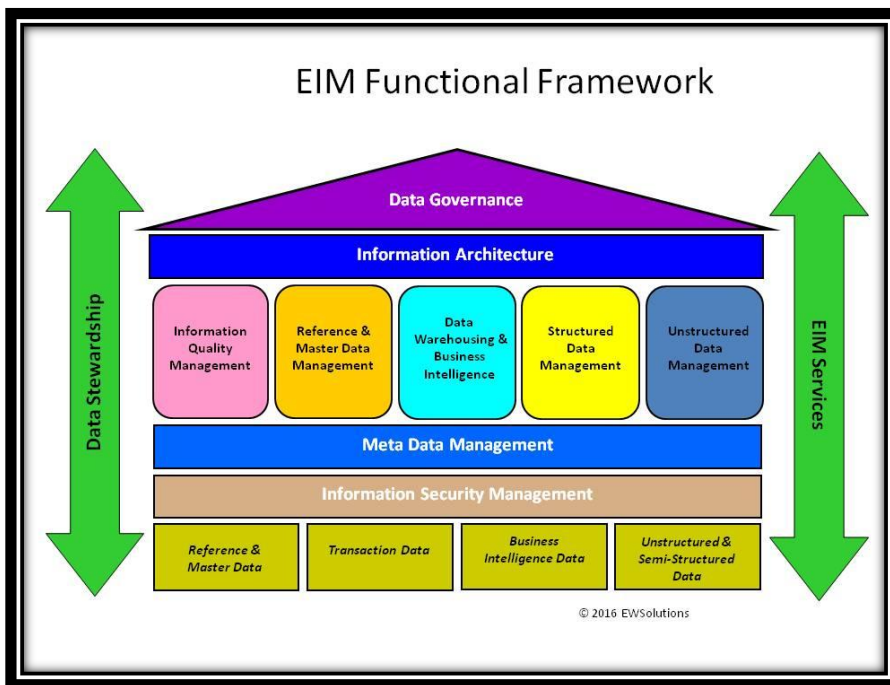
### Data Management challenges raise need for change

Several years ago, Thrivent Financial installed data warehousing / business intelligence solution software to update the company's outdated technology and to move it toward a long-time goal of a unified approach to managing its decision support data more effectively. However, the company did not focus on the underlying enterprise information management challenges of data architecture, metadata management, data governance,

master and reference data management in this effort. Additionally, the upgrade was not performed using data warehousing and business intelligence proven practices and industry standards for data integration, data warehouse architecture and data warehouse metadata management, ultimately causing the newly-installed system to be too complicated, too cumbersome and too expensive to maintain.

Thrivent retained industry leader [Enterprise Warehouse Solutions](#) and used its expert consultants to perform a complete enterprise information management current state assessment, and a companion enterprise data warehouse / business intelligence assessment. Enterprise Warehouse Solutions' team of experienced top-level strategists was able to provide the company with exemplary advice, guidance, planning and execution strategies and recommendations for improvement in all areas of EIM (data governance, master and reference data management, data architecture, metadata management, data integration, data quality management, data security, database operations, etc). Enterprise Warehousing Solutions also performed a comprehensive assessment for the data warehousing and business intelligence, and enterprise architecture at Thrivent concurrently with the EIM assessment.

Finally, Enterprise Warehousing Solutions performed a comprehensive assessment of the current state of metadata management at Thrivent and made business and technical recommendations for the development and implementation of a managed metadata environment to support the organization's stated needs for context for its data and information.



Enterprise Warehouse Solutions consultants brought outstanding credentials and dedication to the partnership while also offering:

- Exceptional experience in all facets of enterprise information management assessment and implementation
- Exceptional experience in all areas of data warehousing and business intelligence assessment, architecture, project management and data integration
- Exceptional experience in all areas of metadata strategy development metadata assessment, technical metadata architecture (Managed Metadata Environment - MME), metadata project management and metadata integration
- Sophisticated interpersonal communication skill for delivering knowledge transfer
- Thorough understanding of enterprise information management best practices and industry standards, especially in the areas of data management strategy, data governance and stewardship, data architecture, metadata management, master and reference data

management, data warehousing and business intelligence, and the project management in these areas

- The invaluable ability to view the technology from the business person's perspective

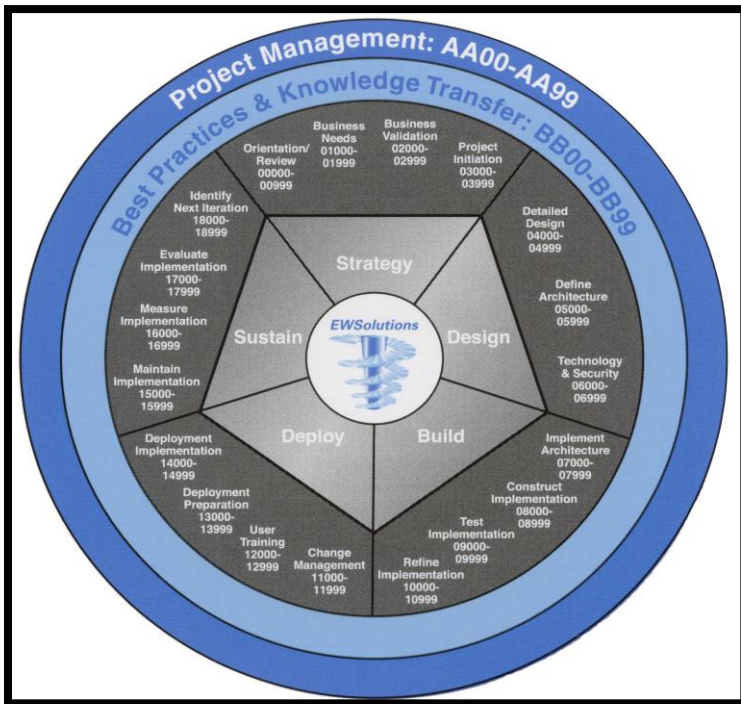
With the superior guidance of Enterprise Warehouse Solutions in EIM and DW/BI assessment, with clearly defined recommendations for improvement and a series of phased implementation roadmaps, Thrivent Financial was able to plan its new approach to data management confidently with these clearly defined goals:

1. Plan for data governance and implement the plan
2. Establish the foundations of enterprise data architecture
3. Improve the current state of data usage for business intelligence
4. Expand the use of the data warehouse
5. Develop a plan for action for improved metadata management

Using senior resources from Enterprise Warehouse Solutions, Thrivent was able to meet all the defined goals in the specified period.

Additionally, Enterprise Warehouse Solutions expertly guided Thrivent Financial through implementation of its industry leading I3<sup>sm</sup> methodology for data warehousing and business intelligence. The results of this methodology implementation included:

- Analysis of I3<sup>sm</sup> against current Thrivent data warehousing / business intelligence practices
- Assessment of gaps between Thrivent DW/BI practices and industry proven practices in I3<sup>sm</sup>
- Incorporation of I3<sup>sm</sup> stages, phases, activities, templates into Thrivent DW / BI approach
- Expert guidance for blending I3<sup>sm</sup> and Thrivent approaches into a unified method
- Incorporation of new method into selected DW/BI implementation projects



**EWSolutions'** I3<sup>sm</sup> methodology for Business Intelligence/Data Warehousing (BI/DW) is a highly customizable, iterative, and workflow-oriented methodology designed to help your organization achieve enterprise BI/DW success effectively. With hundreds of fine-grained tasks with clear objectives, success factors, and responsible parties identified, I3<sup>sm</sup> enables the development of a BI/DW 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 BI /DW efforts. I3<sup>sm</sup> underscores **EWSolutions'** numerous award-winning efforts <http://www.ewsolutions.com> ©

and thought-leading practices and supports integration with Enterprise Information Management (EIM), data governance, and managed metadata environment (MME) efforts. I3<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 BI/DW program.

### **Methodology Critical Points:**

With highly customizable task narratives, templates, and examples, I3<sup>sm</sup> allows any organization to fit the methodology to its efforts, not the other way around. The methodology adds value to a BI/DW program without adding unnecessary complexity or unjustified efforts.

An iterative methodology with overlapping phases and activities, I3<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 I3<sup>sm</sup> workflow provides discipline and manageability to any BI/DW program. A BI/DW program can be very complex – using the I3<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.

## **Assessment, Roadmaps, Implementation Support Provide Foundations for Growth**

Thrivent Financial's senior business community leadership responded favorably to the assessment and roadmaps provided by Enterprise Warehouse Solutions, even asking the consulting staff to help review potential job candidates and to develop roles and responsibilities for the new employees. Several new staff were hired to participate in various enterprise information management and data warehousing / business intelligence programs. Enterprise information management and DW/BI visibility was raised significantly at senior levels and the organization continues on its EIM and DW/BI foundational development paths.

Enterprise Warehouse Solutions provided sustained guidance and advice informed by industry standards and proven practices, and led / directed several foundational projects during a critical period for Thrivent Financial.

Additionally, Thrivent achieved significant results guided by Enterprise Warehouse Solutions, including:

- Guidance and support for formulating and communicating the concepts and implementation of enterprise information management and its components (data governance, metadata management, master and reference data management, data quality, data integration, etc.) holistically
- Development and refinement of a multi-year enterprise information management improvement and implementation plan
- Consulting to develop a data governance approach based on industry standards and proven practices
- Consulting to support the development of an improved environment for data warehousing and business intelligence, including the adoption of a robust DW/BI methodology

## **EW Solutions Overview**

Enterprise Warehouse Solutions (EWSolutions) is comprised of superior strategic and tactical planning analysts who offer federal 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)