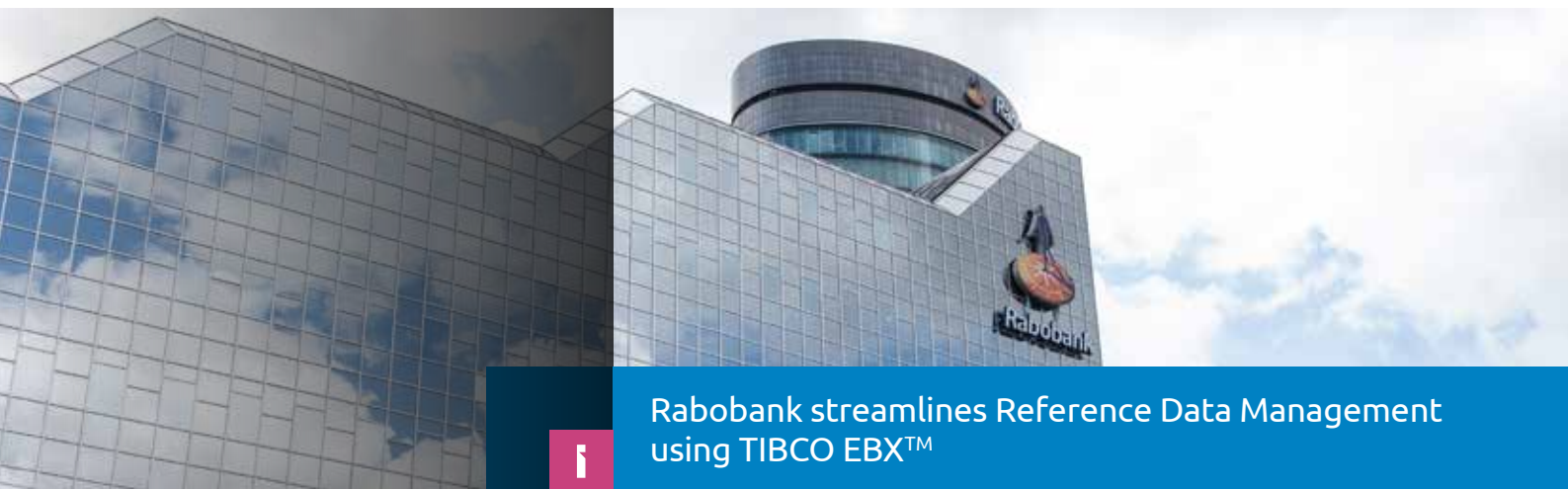




Rabobank streamlines Reference Data Management using TIBCO EBX™

REFERENCE DATA IS LOW-HANGING FRUIT IN DATA MANAGEMENT IMPROVEMENT PROJECTS

Reference data, such as lists of country codes, postal codes or currency codes, are prevalent in any organisation. The larger and more complex the company, the more reference data it will have. ~~This type of data may not be the most interesting aspect of Data Management, but it is crucial to the quality of the data as well as the reporting consistency.~~ Rabobank has consolidated and centralised its Reference Data Management based on TIBCO EBX™ - and saw immediate results.

CONTEXT:

DATA MANAGEMENT AS A BOARDROOM TOPIC

After the banking crisis, the national authorities and regulatory agencies imposed more stringent requirements on the way in which banks handled information management. 'Thou shall be in control of your data' is the watchword of the day. At Rabobank, this has led e.g. to the establishment of a Data Governance Board reporting directly to the Managing Board, and the establishment of a Data Management Office that formulates policy

and supervises implementation of Data Management within the bank. Various Data Management initiatives were then launched to get more control of the data and to increase data management quality. Aspects covered in the initiatives included significance, quality, lineage (how data travels within the bank itself) and the data retention period. These data management aspects were prioritised, because they are essential to achieving compliance with external rules and regulations. Management and distribution of the correct Reference Data were less urgent, but could still do with some improvement. "Reference Data Management may seem only 'nice to have' in comparison to other data management aspects, but because it also influences the quality of data and reporting, it had to be addressed as well," says Pim van Daatse-



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“The convenience of the platform enabled Rabobank to install, model and implement EBX on its own.”

Pim van Daatselaar, Rabobank Data Management Office
SYSTEMATION

laar, Data Management Specialist at the Rabobank Data Management Office.

“Tracking and sharing reference data takes a lot of manual labour; there was no formal structure, and no supervision to ensure the consistency of the data. Updating and distributing the data was a tiresome process for the data owners, which involved creating Excel lists that subsequently needed to be sent out by email. And of course everybody did that their own way.” Moreover, the inconsistencies led to inaccurate reports.

Clearly, reference data management had to improve in both quality and efficiency. Rabobank has established a Reference Data Management Office (RDMO), with all the business processes and roles that such an office entails. To ensure it would be a success, Rabobank went looking for the right tooling to support the RDMO.

THE SOLUTION:

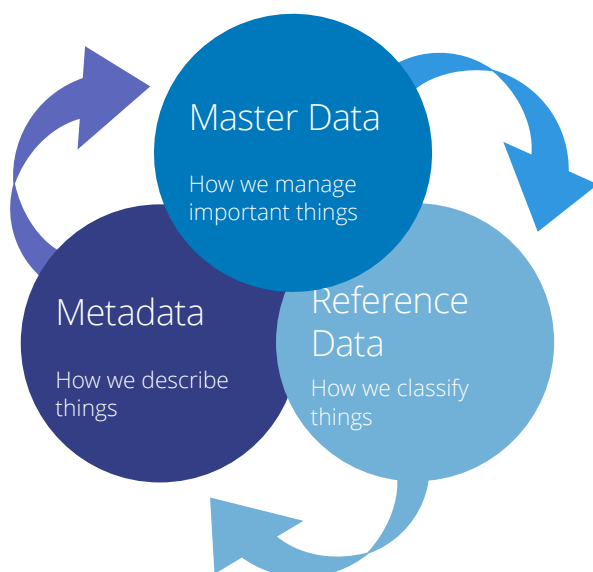
CONSOLIDATION AND CENTRALISATION IN EBX

Following a thorough orientation in 2017 to explore the available tooling options, the Data Management Office settled on the EBX platform. The choice was made partly because EBX had a very good score in the Gartner Magic Quadrant, and partly because the Proof of Concept established by Systemation showed that TIBCO EBX™ did what it was supposed to do – and more, for example

in terms of convenience and management. Moreover, EBX connects seamlessly to the Rabobank organisation with its multitude of group divisions, business units and departments. The platform therefore supports a strategy of ‘centralised when necessary and decentralised where possible.’

Systemation was the intermediary that delivered EBX and trained the data specialists at the Rabobank RDMO in using and managing the platform. Since then, Systemation has continued to provide second-line support for the platform and arrange escalation to the EBX support desk at TIBCO if necessary.

Rabobank took responsibility for Change Management implementation and configuration. “We opted for a pull strategy: first we show them what’s possible in small steps, so people get excited about it and want to start using the tool, instead of adopting a Big Bang approach. This also helps us keep things manageable with our own limited resources.” Rabobank also opted to stay as closely as possible to the standard EBX settings, avoiding any customisation or specific parameters. Van Daatseelaar and his team developed the user training programme themselves. A Reference Data Project Board was installed that determines which reference data has to be managed at which level (global or local), as well as the priority status and who will be managing it. In addition,



Categories of Shared Data Assets
Source: TIBCO

Master Data provides **truth**

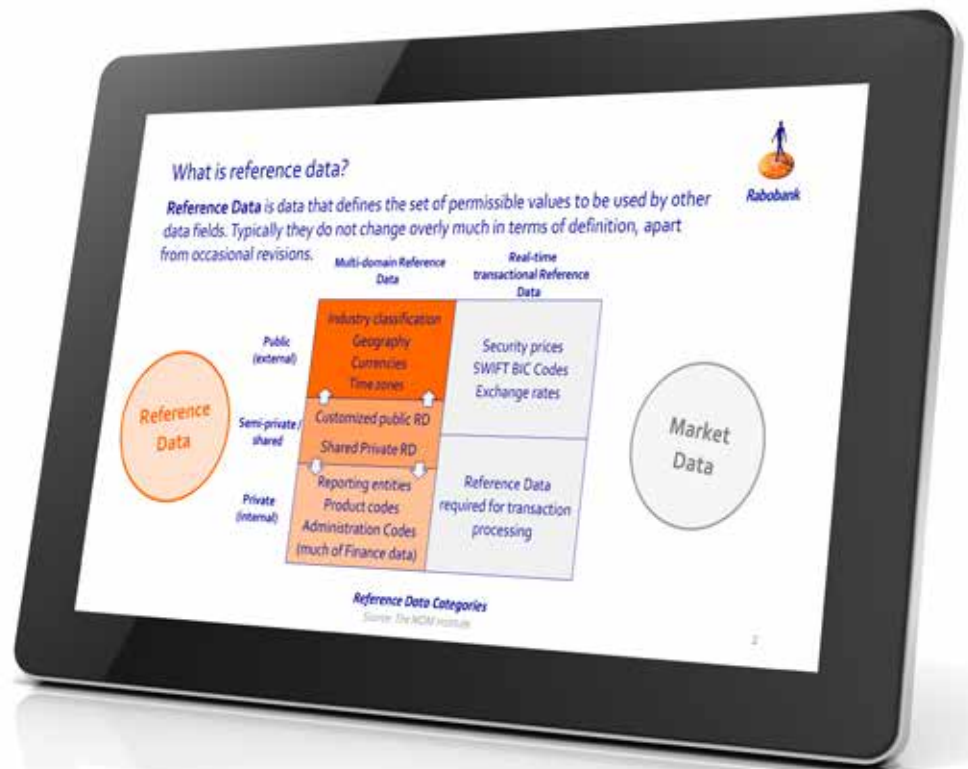
Customers	Business Partners	Assets
Products	Suppliers	Locations
Bill of Materials	Employees	Digital assets

Reference Data provides **context**

Industry Codes	Geographies	Org Chart
Currencies	Chart of Accounts	Cost Centers
Segments	Legal Entities	Standards

Metadata provides **meaning**

Business terms	Taxonomies	Systems
Critical Data Elements	Entitlements	DQ Rules
DG Policies	Big Data Catalog	Reports



tion, the following roles and their associated rights were defined and implemented in EBX: Definition Owner, Data Modeller, Data Steward, Data Consumer and Subscriber. Reference data that is or will be managed locally is also incorporated into EBX.

RESULTS: MORE EFFICIENCY, FEWER MISTAKES, AND EASIER DIY DEVELOPMENT

The RDMO has started managing in EBX, using the various Industry Codes as a showcase. Following delivery in February 2018, this resulted in immediate improvements in the efficiency and quality of the infor-

mation supply. The showcase also demonstrated the true strength of EBX.

The convenience of the platform enabled Rabobank to install, model and implement EBX on its own. "That's pretty special, because something like this usually requires specialists from outside the company," says Van Daatselaar. As a result, relying on a small team consisting of only a handful of people, the data management of a data-intensive organisation with nearly 50,000 employees was elevated to high standards of quality worldwide, and maintained at that level.



THE RESULTS AT A GLANCE

1. Successful worldwide implementation
2. Improvements in Reference Data Management directly influence the bank's overall data quality and reporting.
3. Short lead time: 1.5 years after the project started, a substantial part of the global reference data had been incorporated into EBX.
4. Data Governance established
5. A substantial gain in efficiency was made in creating, managing and using reference data in systems and reports. From 'nice-to-have' to 'must-have': user organisations are lining up for onboarding
6. Rabobank is almost fully self-supporting: no external implementation consultancy needed, and the team does the modelling itself.
7. Accurate reference data is always available from a single source, presented in an appealing way.
8. Trust and confidence in the tried-and-true quality of the platform and Systemation.

FUTURE:

CONTINUE TO ROLL OUT REFERENCE DATA MANAGEMENT

The structure is all set and ready to go, as is the governance. Van Daatselaar and his team are now continuing implementation and optimising user-friendliness. "We have imported hundreds of tables by now. However, we're not home free just yet; there's still a lot of work to be done, especially at a local level." "And we can't wait for the moment that TIBCO starts providing EBX™ as a SaaS cloud service. That offers us the convenience of not having to use and manage the software ourselves."

RABOBANK AND SYSTEMATION

Systemation is the business partner of TIBCO EBX™ in the Benelux. Van Daatselaar: "It's a great group of people who have loads of knowledge and a proactive attitude. It's very nice to have a partner nearby who has the right connections at the TIBCO organisation. Flexibility and short lines of communication are needed in such an implementation. They've put us on the right track and will help us if needed. But the software is so user-friendly that we can solve lots of problems ourselves."

Pim van Daatselaar, Datamanagement Specialist Rabobank (li)
Jaap Franse, Directeur Systemation (re)

TIBCO EBX™

EBX makes Master, Reference and Meta Data Management easier. Customised applications and specially tailored DM solutions are hard to change, but EBX is flexible and agile. The solution itself, just like the project roll-out, is aimed at end users, which significantly enhances and accelerates user adoption of the solution within the organisation. EBX uses a unique 'what-you-model-is-what-you-get' approach to design: generating applications on the fly that are fully configurable. This eliminates the need for long, costly and seemingly endless development projects. And EBX envelops all the business facilities required to create data-driven applications. Data stewardship, workflow, data quality and data integration are standard features.



SYSTEMATION

On behalf of its business contacts, Systemation is always looking for technology that might be interesting to a wide range of organisations that face similar challenges – innovative IT solutions that speed up the digital transformation.

Systemation also ensures that the organisation is able to use the technology successfully and profit to the fullest, achieving long-term results. That means: support in implementation, training, product management and application management. TIBCO EBX™ gave us a very powerful platform for establishing and supporting Data Management in organisations of all sizes.