MATRIO®-Methodology

A combined bottom-up and top down approach for the implementation of Information Governance (IG)

WHY MATRIO®?

MATRIO®

MATRIO® is fully owned by Wildhaber Consulting, Zurich, Switzerland

Experience with practical implementation of information governance (IG) programs in the last few years has clearly shown that **a top down approach of IG implementation is highly susceptible to failure.** We know that policy comes from above but the implementation music plays in the core business where value creation happens and not in corporate centers.
So why should we try to implement such an abstract topic as "Information Governance" only from the top if even the brightest minds in our organization don't understand the meaning and possible benefits of it?

Shortcomings of strategic projects:
These are several shortcomings of top down organized IG initiatives:

- Strategic projects (ECM, RIM etc.) cannot solve problems immediately and strategic alignment is tough and takes **too long**; the big bang is merely possible.
- Nobody cares, because you cannot get laurels and success; nobody has a sense of accountability.
- Real life problems remain unsolved and people loose interest and withdraw support

WHAT IS THE ALTERNATIVE?

GOVERN WHERE NEEDED BY SOLVING OCCURRING PROBLEMS IN CONJUNCTION WITH CREATING STRUCTURES & RULES WHICH ARE SUSTAINABLE

- Guiding and directing management and users towards IG by **starting from a given pain point** and **develop possible solutions towards upper levels;**
- Towards upper levels means: Deliver pragmatic solutions (**„frog perspective“**) according to needs and escalate upper levels by addressing the broader context and including other stakeholders.

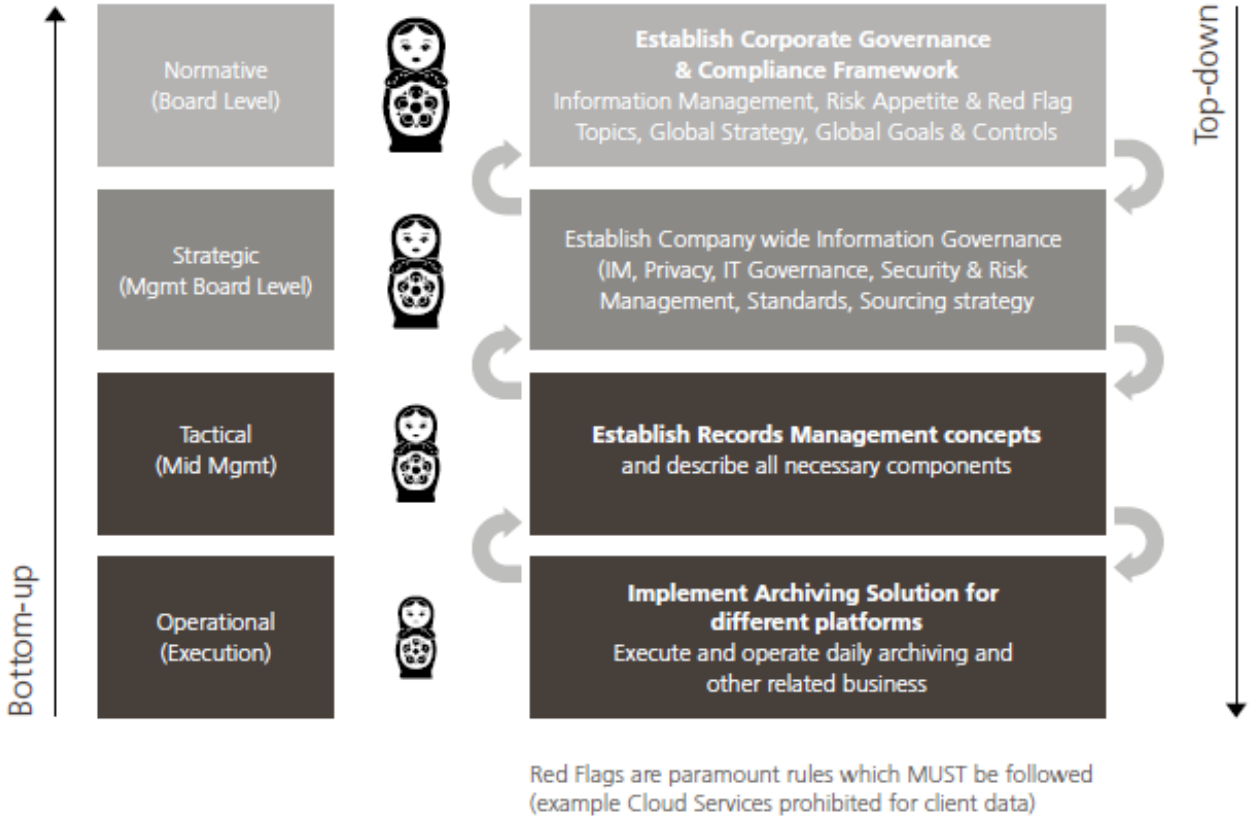
Therefore the Swiss Information Governance Competence Center has developed a methodology which **fits into a Corporate Governance framework but at the same time is simple enough to enable non-experts to identify domains of IG in order to derive corresponding tasks**.

Elements of the MATRIO-Methodology?

The methodology is based on the following comprehensive elements:

- A **multi-stage model** for assigning topical tasks related to appropriate decision levels (see picture below).; it does not really matter where to start but to co-operate hand in hand and create sort of a pincer movement.
- A list of **relevant topics** / disciplines
- A list of **appropriate standards & methodologies** (toolkit)
- **Conformance** requirements (catalogs)
- **Performance** requirements (catalogs)
- Catalog of **red flags**
- A **phasing model** for implementation

Multi-stage model of MATRIO® Methodology



Red Flags are paramount rules which MUST be followed
(example Cloud Services prohibited for client data)

Catalog of Red Flags

Red flags are the most frequent operational trigger events which create problems to be quickly solved, possibly escalated on a higher level in order to develop sustainable solutions :

- Master data
- Cloud
- Multimedia
- Data quality
- Single source publishing, forms mgmt

- Standards
- Metadata
- Regulatory requirements
- Backup vs archiving
- Workflow mgmt, digitization