

A PATH FORWARD DATA STRATEGY

NARIEM

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About the Presenter



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- Vice President Data Enablement & Analytics
- Based in Toronto, Ont., Canada
- Experienced data executive leading organizations in the financial services industry in establishing data management and analytics programs

BentallGreenOak

- Global real estate investment management advisor and a globally-recognized provider of real estate services
- Offices in 24 cities around the world
- Expertise in asset management of office, retail, industrial and multi-residential property across the globe

\$49 B USD

AUM

(as of June 30, 2020)

60 M

SQ. FT OF ASSETS
UNDER
ADMINISTRATION

750+

CLIENTS AND
PARTNERS

Current Situation

| Theme | Example |
|--|--|
| Lack of enterprise consistency | <ul style="list-style-type: none">▪ Definitions, process |
| Significant manual workarounds | <ul style="list-style-type: none">▪ Inflexible source systems▪ Numerous application |
| Data redundancy | <ul style="list-style-type: none">▪ Multiple data sources causing duplicate data |
| Significant effort to reconcile / validate data and reporting | <ul style="list-style-type: none">▪ Lack of automated data integrity checks▪ Multiple data sources |
| High degree of effort to respond to ad hoc requests | <ul style="list-style-type: none">▪ Difficult to respond to ad hoc requests if data not already accessible▪ Ad Hoc reporting requires gathering data from multiple sources requiring significant time and effort to format and clean the data |

Remaining Competitive



- Develop data strategy that addresses the needs of the business (e.g. generate above average return / more productive assets)
- Prioritize activities to support business objectives
- Align leadership support
- Move the company up the data governance capability model

Target State

| Enterprise Data Management | Information Management | BI Reporting & Analytics | Digitize Key Business Processes | Data Culture |
|----------------------------|--------------------------------|--------------------------|--|---------------------------------------|
| Data Governance | Data Architecture and Security | Predictive Analytics | Optimize and digitize processes and its components | Engaged Executive Sponsorship |
| Data Warehousing | Privacy and Control | Patterns & Trends | Digitize data and information | Change Mgmt, Training & Communication |
| Reference & Master Data | Information Lifecycle Mgmt | Business Intelligence | Robotics Process Automation | Organizational Alignment |
| Data Quality Mgmt | Metadata & Taxonomy | Information Reporting | | Enable data for BGO and innovation |

How do we get started?

| | Initiatives | Phase I | Future Benefits |
|---|---------------------------------------|--|--|
| 1 | Application Review | <ul style="list-style-type: none"> Identify best enterprise-wide applications Begin plans for implementation | <ul style="list-style-type: none"> Increased Employee productivity & engagement <ul style="list-style-type: none"> Focus employee time on value-add analysis rather than data gathering |
| 2 | Information Management | <ul style="list-style-type: none"> Develop and implement Information Classification and Protection Policy | <ul style="list-style-type: none"> Provide guidance for classifying information and advise on appropriate methods of protection for information in all its formats and locations, and throughout all its lifecycle stages |
| 3 | Key report (KPI), data and/or process | <ul style="list-style-type: none"> Identified and delivered improvements for AUM Reports Improve integrity of NAICS data | <ul style="list-style-type: none"> Generate cost reductions through eliminating duplication and identifying opportunities to automate Increase value added activities performed by staff Develop a repeatable process framework that can facilitate quicker future project completion and implementation (continuous improvement) |
| 4 | Enterprise Data Management | <ul style="list-style-type: none"> Design and develop Data Governance Program | <ul style="list-style-type: none"> Providing access to data, ensuring it's available and with integrity Enhanced understanding of data (external / internal) enabling the company to generate powerful insights |
| 5 | BI & Reporting | <ul style="list-style-type: none"> Portfolio Reporting | <ul style="list-style-type: none"> Enhanced Portfolio Reporting <ul style="list-style-type: none"> Reporting through self-serve applications (incl. on mobile) |
| 6 | Data Culture | <ul style="list-style-type: none"> Develop and launch implementation of data culture | <ul style="list-style-type: none"> Establish culture that values continuous improvement and data Improve organizational data literacy |

Thank you