



## COUNCIL FOR CHIEF DATA AND ANALYTICS OFFICERS



# Agenda – 5<sup>th</sup> Meeting

**Theme: Navigating the Evolving Data Landscape**

**MARCH 26<sup>TH</sup> – 27<sup>TH</sup>, 2019 in TORONTO, ON**

**Meeting Location:**

**Gowling WLG**

First Canada Place, 100 King St. West  
16<sup>th</sup> Floor, Suite 1600 – Strathys \ Smith Lyons Rooms  
Toronto, ON M5X 1G5

**Accommodations:**

**Executive Hotel Cosmopolitan**

8 Colborne St, Toronto, ON  
M5E 1E1

**Contact Us:**

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**Meeting Objectives:**

- Explore the challenges and best practices on how organizations are leveraging data governance and strategy to keep up with the pace of change,
- Gain a better understanding of how peers are managing data lakes and architecture to deliver value to their organizations,
- Examine key strategies to engage internal key stakeholders and what you can do differently, and
- Network and engage in open and frank discussions with fellow peers in a trusted environment.

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**Tuesday, March 26<sup>th</sup>, 2019**

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**6:00 p.m. Informal Networking Dinner**

**Restaurant: Wildfire Steakhouse Cosmopolitan Hotel – The Crystal Private Room**  
8 Colborne St, Toronto, ON M5E 1E1  
416-350-8188

The reservation will be under the name *The Conference Board of Canada*.

**Wednesday, March 27<sup>th</sup>, 2019**

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**Location: Gowling WLG, First Canada Place, 100 King St W, Toronto, ON M5X 1G5, 16<sup>th</sup> Floor, Suite 1600 – GLH Boardroom - Strathys \ Smith Lyons Rooms**

**8:15 a.m. Networking Continental Breakfast – Gowling WLG, 16<sup>th</sup> Floor, Strathys/Smith Lyons Room**

**8:45 a.m. Welcome, Roundtable and Opening Remarks**

**Marianne Fotia, Manager, Executive Networks, Technology and Innovation Policy, The Conference Board of Canada**

**9:15 a.m. Data Governance: Lessons Learned in the Journey from Foundation to the Brink and Back**

**Meg Hutchison, Assistant Vice-President, Data Governance, Home Trust**

In this session, Meg will share key lessons learned from her experience with the Data Governance journey at Home Trust from the program's foundation, through an early 'proof-of-value' pilot to successful formalization of the program framework, policy, guidelines and KRIs, then through the ultimate stress test of the company's liquidity crisis and subsequent recovery. Her presentation will also reflect on where the data governance program is headed in light of growing regulatory pressures on the mortgage industry and increased business demand for more data sources to generate insights as a competitive advantage.

BIO: Meg leads the team who established and manages the data governance program at Home Trust. The program mandate is to mature sustainable capabilities across the enterprise in order to deliver trusted, well-understood information, to more effectively manage data as a strategic asset and to reduce information management risk. Meg brings to the position both business expertise and a strategic understanding of technology, data, and analytics. She is a versatile, results-oriented practitioner with more than 20 years' experience in financial services data management from progressive roles in marketing, sales support, finance, data migration, business intelligence and data governance.

**10:15 a.m. Networking/Health Break**

**10:45 a.m. Partnering with Internal Stakeholders as the Data Landscape Changes**

**Carl Lambert, Vice-President, National P&C Business Intelligence, The Co-operators**

**Tim Barrett, Senior Director, Digital Solutions, The Co-operators**

As for many organizations, The Co-Operators' information technology and business intelligence units went through several phases of partnerships. At times the process was difficult, and it required them to re-evaluate their methods and approaches. The end result was that they created a very strong partnership and on the majority of projects, they work as one team. Tim and Carl will present on their journey... the good and the bad!

BIO: Carl Lambert is Vice-President of National P&C Business Intelligence at The Co-operators. For eight years, he was a lecturer in actuarial science at three different universities, and over the last three years, he has written several papers and spoken at more than 30 industry conferences in North America. His team of more than 75 professionals in mathematics, statistics, IT, and actuarial science is responsible for the development of analytics throughout the organization. He completed a master's degree in actuarial science in 1994.

BIO: Tim Barrett, Senior Director, Digital Solutions, started his career as a developer for various insurance organizations. At Manulife, Tim moved into leadership during the Year2000 project and continue to lead acquisitions for the Individual Life business within Manulife. In 2007, Tim joined Blackberry, then Research in Motion, to establish DevOps and software development processes to greatly enhance the velocity, consistency and quality of deliverables. In 2015, Tim moved to Cooperators to lead the IT team supporting the Finance and Business Intelligence teams. His main focus was to improve the relationship between the BI and IT teams.

11:45 a.m.

## Networking Lunch

12:45 p.m.

## Analytics in Support of Decision Making: The OMGCS Case

### **Rene Alvarez, Manager, Business Intelligence, Enterprise Digital Service Integration Division, Ministry of Government and Consumer Services**

Rene will present on the different analytics tools and techniques used in the Ontario Ministry of Government and Consumer Services (MGCS) to create value and to drive evidence-based decision-making and continuous improvement with the objective of providing best-in-class services to Ontario citizens, businesses, and government. Rene will cover the following subjects:

- GIS in support of office location;
- Predictive analytics;
- The use of computer simulation;
- Advanced statistics applied to estimate wait times in in-person locations;
- AI to get the “Voice of the Customer”; and
- "Exceling in dashboards”.

BIO: Rene Alvarez is an Industrial Engineer with more than 25 years of professional experience. He holds a Master's degree in Industrial Engineering (University of Toronto), Academic Diplomas in Marketing and Advanced Negotiation (University of California at Berkeley), and a professional diploma in Transportation and Logistics from the Pontificia Universidad Catolica de Chile. Rene is a passionate and enthusiastic business leader, with extensive knowledge and varied experience in engineering, analytics, business Intelligence, strategic planning, operations effectiveness, and change management. He brings his executive and leadership experience from a number of leadership roles held in Government, private sector, and educational institutions, with a proven track record of adding value to organizations through his solid principles, integrity, and fact-based decision-making approach. Currently Rene leads the Business Intelligence Unit, Data Analytics Branch at the Ontario Ministry of Government and Consumer Services. In this position Rene has formed, trained, and led a high performance team of data scientists who perform complex analyses to provide intelligence in support of decision making and continuous improvement. Among these complex analyses are: analysis of customer feedback using advanced Artificial Intelligence (AI) cognitive tools to understand “The Voice of the Customer”; customers' digital experience using Web Analytics tools (Google Analytics); multi-channel Customer Satisfaction; forecasting; capacity planning using computer simulation; and location of offices using Geographic Information Systems (GIS). Through his passion, enthusiasm, and ability to inspire, combined with his extensive experience in engineering, Rene has influenced younger generations of future engineers through teaching in prestigious universities in Canada and Chile.

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1:45 p.m.

## **Best Practices for Data Governance - Lessons from Recent Guidelines and Decisions**

**Chris Oates, Partner, Gowling WLG**

Chris will review recent guidelines and decisions from the privacy commissioner to identify best practices for corporate data governance.

BIO: Chris Oates is a Toronto-based Gowling WLG partner practising in the Advertising & Product Regulatory Group, with a particular focus on matters related to privacy and electronic commerce. His practice includes advising clients on privacy including drafting and reviewing privacy policies and advising on privacy in the context of behavioural advertising and tracking, social media, consumer marketing campaigns, electronic commerce, risk management, and Canada's anti-spam legislation (CASL).

2:30 p.m.

## **Networking/Health Break**

3:00 p.m.

## **Exploring Data Lakes: Challenges, Value and Pitfalls**

**Facilitated by Dr. Vanessa Thomas, Senior Research Associate, Technology and Innovation Policy, The Conference Board of Canada**

Data Lakes, a storage repository for large amounts of raw data, were a recurring discussion topic amongst attendees at our last event. Dr. Vanessa Thomas will facilitate this roundtable discussion, which will see attendees explore and delve into the following questions: How can data lakes be used effectively within an organization? What are some of the challenges that we are encountering whilst implementing, using, and managing data lakes? When are data lakes an inappropriate solution?

3:45 p.m.

## **Overcoming Barriers and Identifying Promising Strategies**

CCDAO members will discuss their own experiences, strategies, successes, and challenges in leveraging data architecture, governance and strategy. Based on what they have learned today, they will focus on what they can take home and implement in their own organizations.

4:15 p.m.

## **Council Business Discussion and Wrap-Up**

**Marianne Fotia, Manager, Executive Networks, Technology and Innovation Policy, The Conference Board of Canada**

4:30 p.m.

## **Adjournment**