

NAREIM Data Strategy Meeting

10 - 12 Nov 2020

Poll results

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- Within your organization, are you:
- DATA PROVISIONING_Rate the level of pain associated with each of the following when acquiring data from your partners: EXPECTATIONS – you receive the information you need
- DATA PROVISIONING_Rate level of pain: TIMELINESS – You receive the information when you need it
- DATA PROVISIONING_Rate level of pain: ACCESSABILITY – You/your partner(s) are able to get the data into your system(s) of record so you can access when you need it
- DATA GOVERNANCE_Does your company have a formal data governance program?
- DATA GOVERNANCE_Timeliness: Do you have a defined recurring schedule by which you partners are required provide you information you require?
- DATA GOVERNANCE_Completeness – Do you have a defined set of KPIs, or data elements, that you require you partners to provide you?

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- DATA GOVERNANCE_Accuracy – Do you have a validation process in place to determine if the data you receive from your partners reflects the true stat of your investments?
- DATA GOVERNANCE_Consistency – Do you receive information from your partners in the same format each reporting period?

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- DATA GOVERNANCE_Compliance – Do you have a process in place to measure the degree of compliance with the factors above
- DATA USAGE_How do you store/manage data at your firm:
- DATA USAGE_How do the different functional groups within your organization access the data they need to generate required reporting:
- DATA USAGE_Rate the level of pain associated with generating or producing required reporting: Acquiring required information
- DATA USAGE_Rate level of pain: Extracting specific information from a variety of sources into a required template(s) for different reporting requirements
- DATA USAGE_Rate level of pain: Manipulating data (e.g., aggregations, calculations, etc.)
- DATA USAGE_Rate level of pain: Validating the information you have is correct and consistent across investments

Within your organization, are you:

031

A Producer of data/information/reports

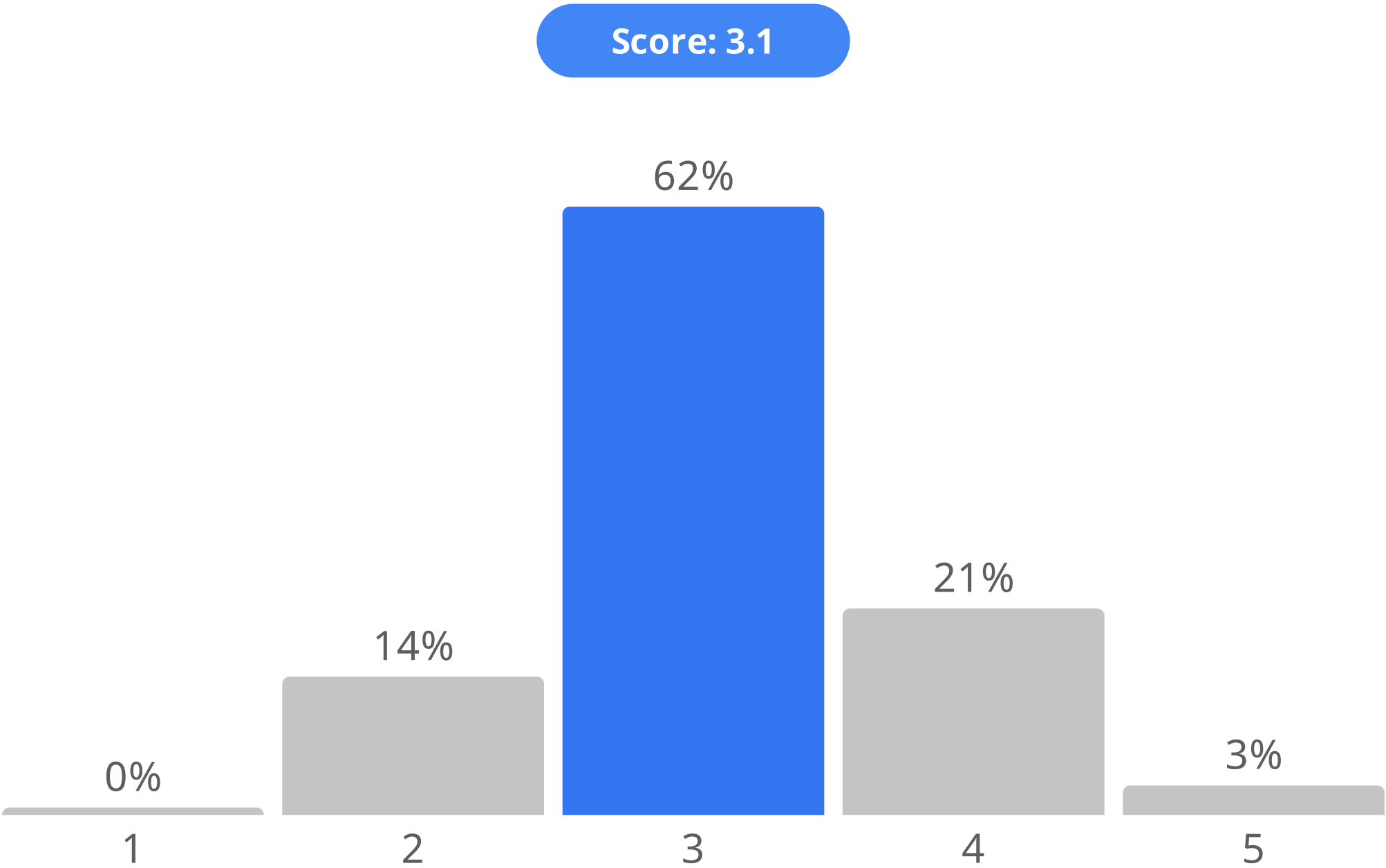


A Consumer of data/information/reports



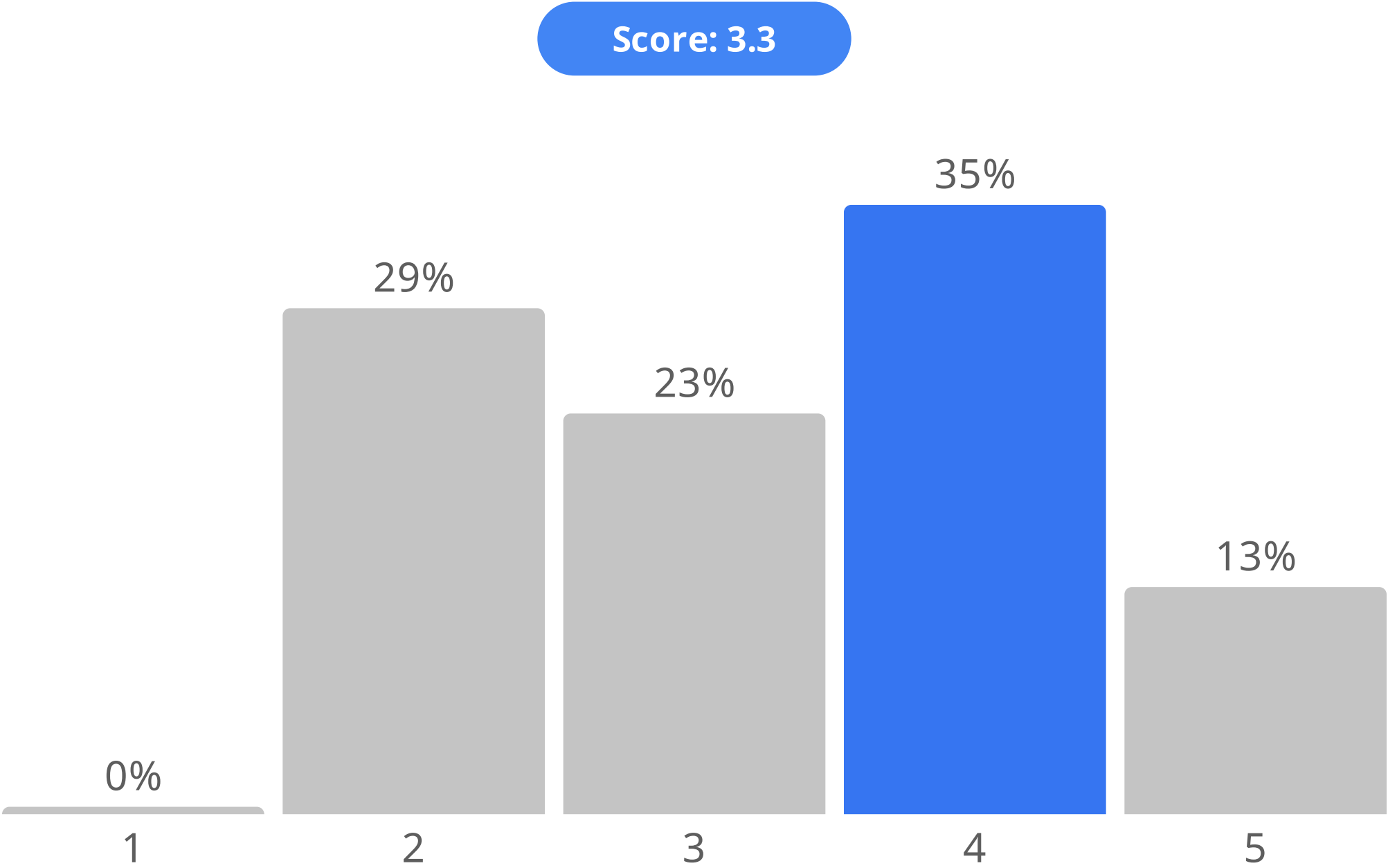
DATA PROVISIONING_Rate the level of pain associated with each of the following when acquiring data from your partners: EXPECTATIONS – you receive the information you need

029



**DATA PROVISIONING_Rate level of pain:
TIMELINESS – You receive the information when
you need it**

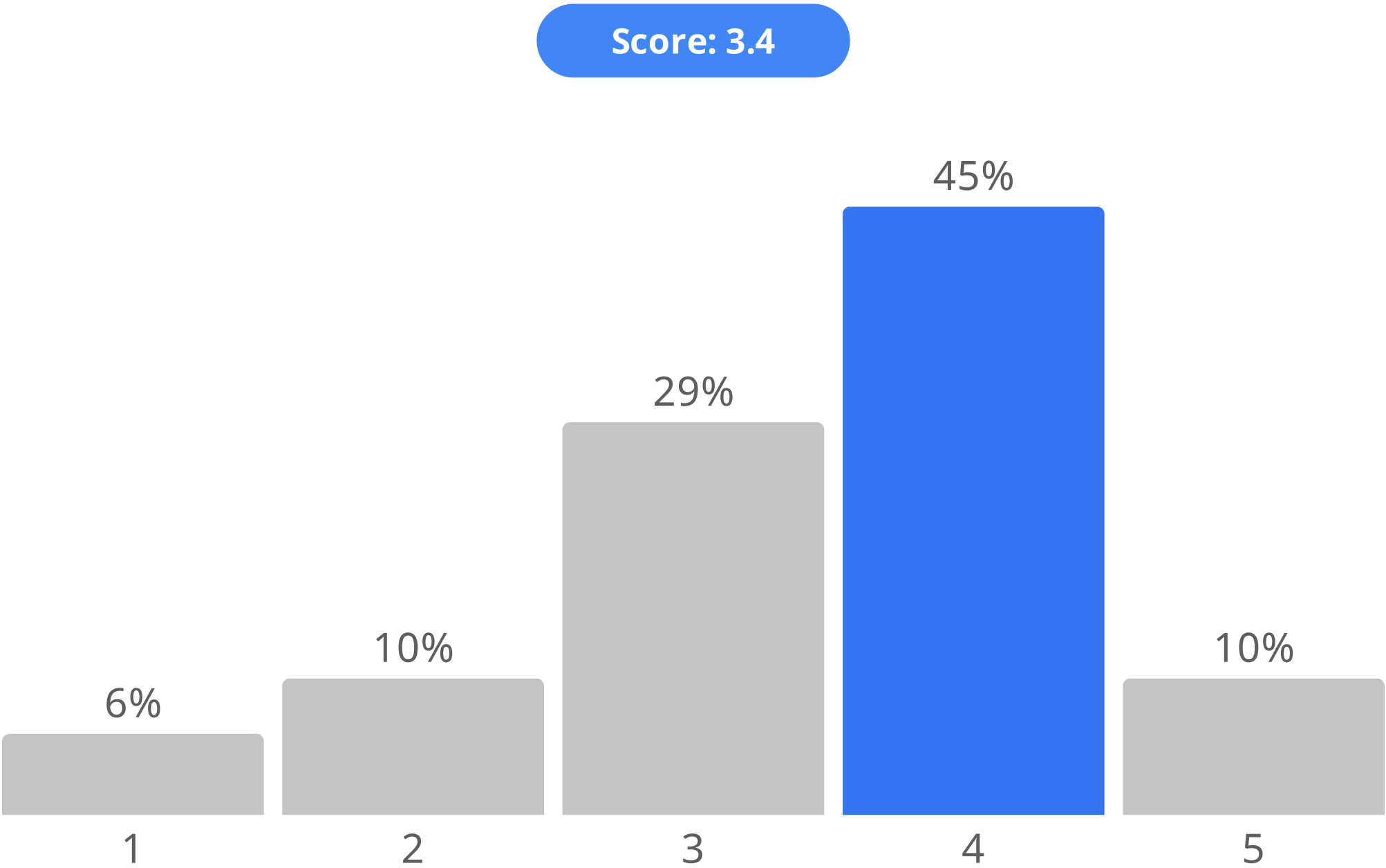
031



Rating poll

DATA PROVISIONING_Rate level of pain: ACCESSABILITY – You/your partner(s) are able to get the data into your system(s) of record so you can access when you need it

031



DATA GOVERNANCE_Does your company have a formal data governance program?

025

YES



NO



DATA GOVERNANCE_Timeliness: Do you have a defined recurring schedule by which you partners are required provide you information you require?

030

YES



NO



DATA GOVERNANCE_Completeness – Do you have a defined set if KPIs, or data elements, that you require you partners to provide you?

025

YES



NO



DATA GOVERNANCE_Accuracy – Do you have a validation process in place to determine if the data you receive from your partners reflects the true stat of your investments?

028

YES



NO



DATA GOVERNANCE Consistency – Do you receive information from your partners in the same format each reporting period?

027

YES



NO



DATA GOVERNANCE_Compliance – Do you have a process in place to measure the degree of compliance with the factors above

027

YES



NO



DATA USAGE_How do you store/manage data at your firm:

028

It is all stored in one system of record

 4 %

It is stored in more than one system

 29 %

It is stored in files (e.g., excel, pdf, word, etc.)

 4 %

A combination of the above

 64 %

DATA USAGE_How do the different functional groups within your organization access the data they need to generate required reporting:

0 2 4

They can access it through one of our systems



They need to submit a request to a defined group within our organization



We have templates and routines that prepopulate data in our reports



Members of each functional team independently pull together the information they need from a variety of sources

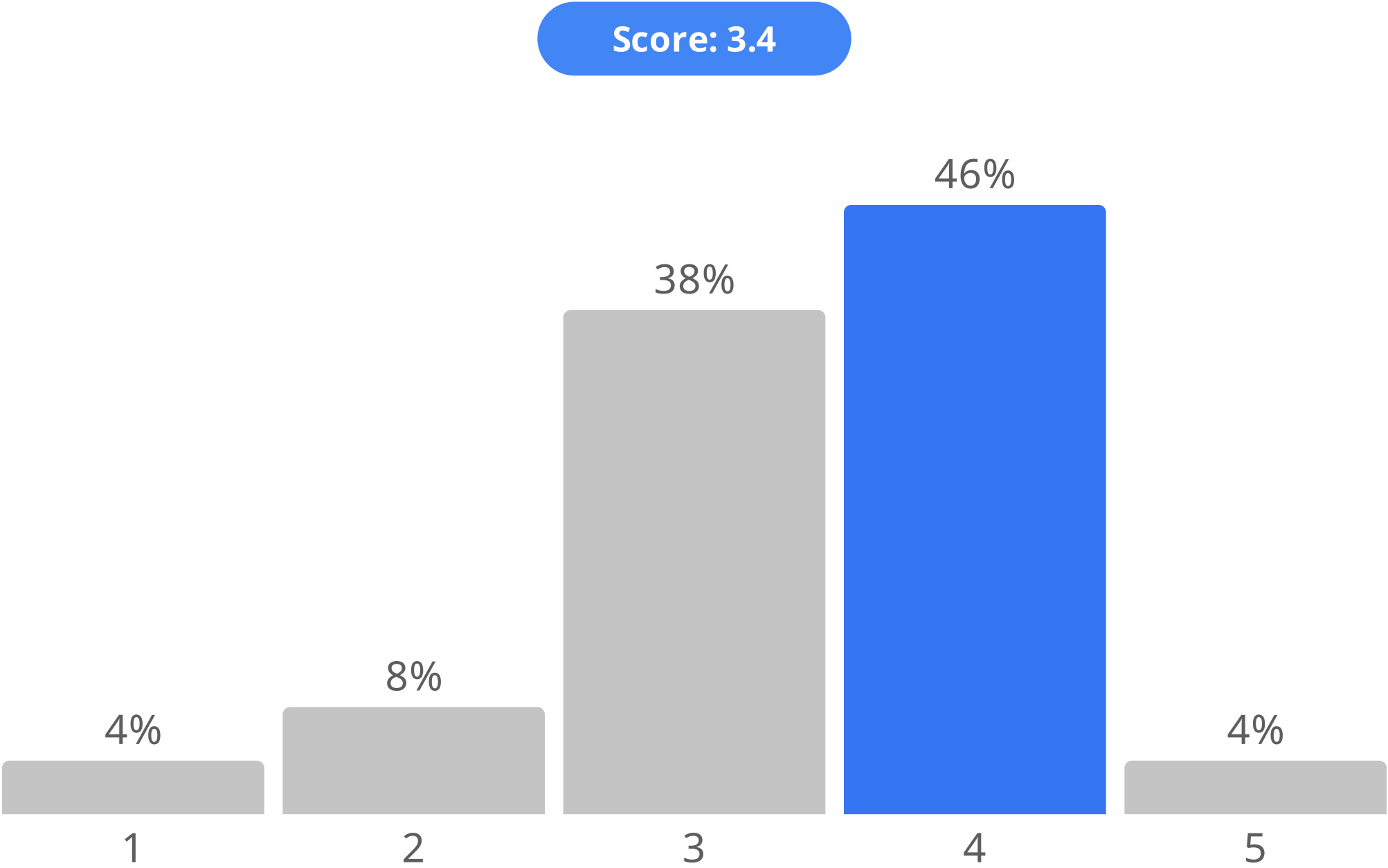


A combination of the above

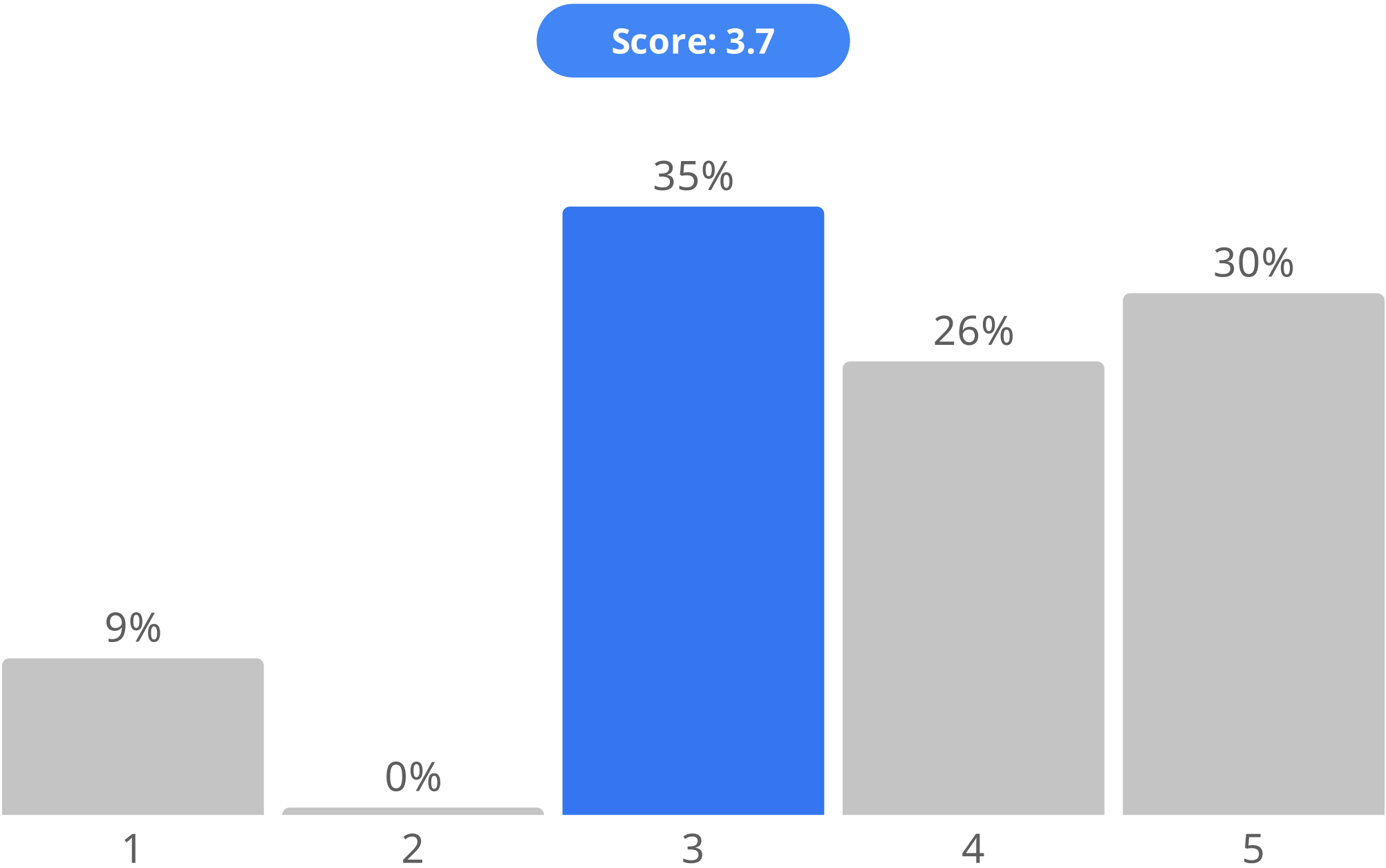


DATA USAGE_Rate the level of pain associated with generating or producing required reporting: Acquiring required information

024

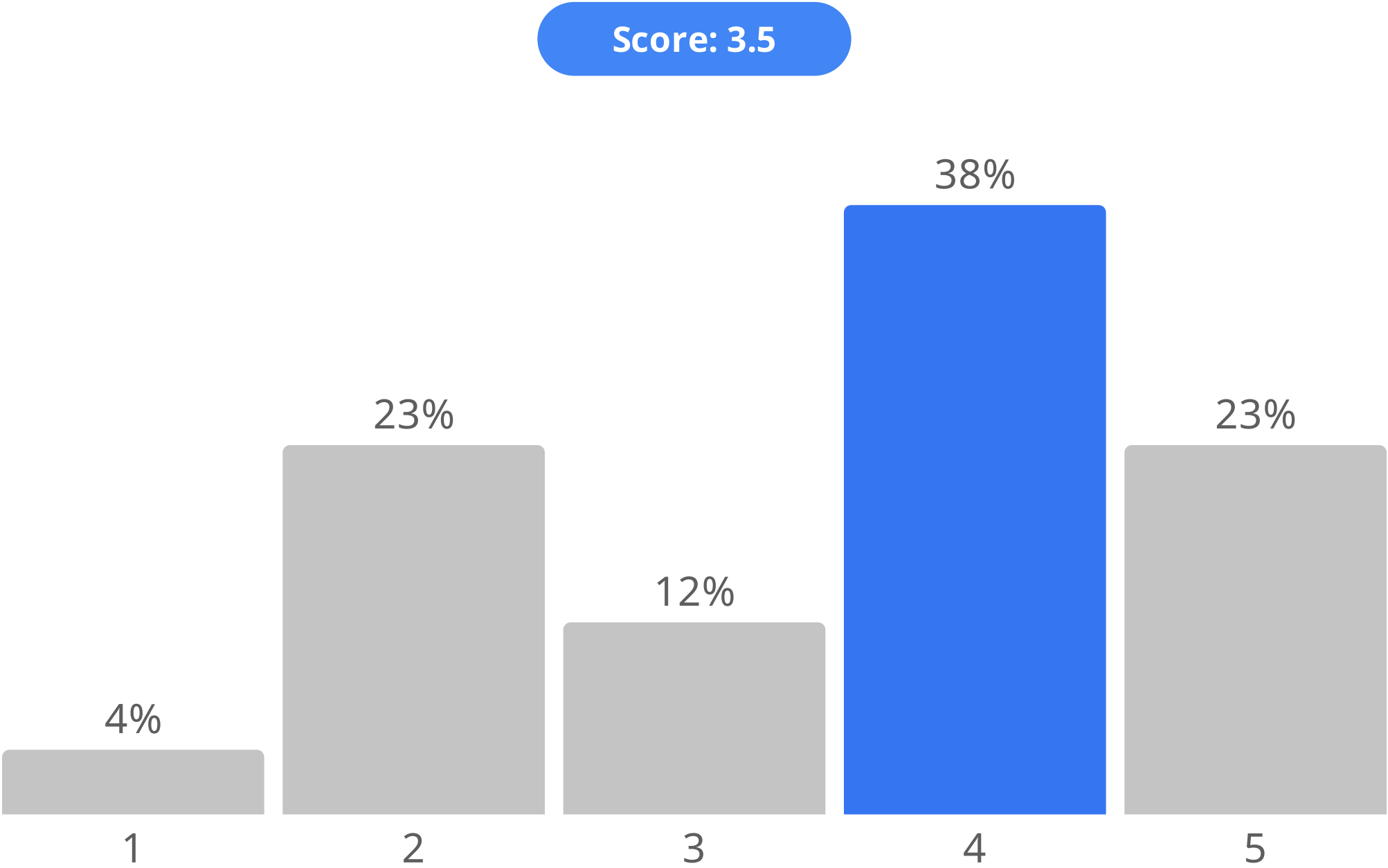


DATA USAGE_Rate level of pain: Extracting specific information from a variety of sources into a required template(s) for different reporting requirements



DATA USAGE_Rate level of pain: Manipulating data (e.g., aggregations, calculations, etc.)

026



DATA USAGE_Rate level of pain: Validating the information you have is correct and consistent across investments

028

