Gartner Peer Insights ‘Lessons Learned’: Implementing Metadata Management Solutions

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Initiatives: Data Management Solutions

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Metadata management solutions allow organizations to classify, manage and organize vital information of their assets. Data and analytics leaders seeking to rebuild their enterprises’ data fabric can learn from the implementation experience of their peers shared on Gartner Peer Insights.

Overview

Gartner Peer Insights is a free peer review and ratings platform designed for enterprise software and services decision makers. Reviews go through a strict validation and moderation process to ensure they are authentic.

We analyzed 178 Peer Insights reviews to identify lessons learned while implementing metadata management solutions. This report focuses on the responses to the questions: “If you could start over, what would your organization do differently?” and “What one piece of advice would you give other prospective customers?” To browse all reviews, see the full list of Metadata Management Solutions reviews on Peer Insights.

Peer Lessons Learned

This edition of “Lessons Learned” summarizes clients’ firsthand experiences with implementing metadata management solutions. The peer advice results both from successful implementation projects and learnings based on what went wrong. This peer perspective, along with the individual detailed reviews, is complementary to expert research and provides a holistic view to the implementation process. Reviewers who submitted their lessons learned represent a cross-section of small- to midsize and large organizations. (See Figure 1.)
Below are some key lessons learned and most cited recommendations by Peer Insights reviewers to help data and analytics leaders in the implementation process of their metadata management solution.

Lesson 1: Probe Your Metadata to Infer the Organization’s Requirements; Get Buy-In Before Vendor Selection

The peers recommend the data and analytics leaders to thoroughly inspect their enterprises’ data supply chain to recognize problem areas that can be leveraged to generate a set of requirements for the implementation of the solution. They further advise the leaders to secure buy-in from all the business stakeholders by creating a data governance strategy and laying out a roadmap for the solution.

Following is a peer’s remark about finding snags in the existing metadata universe:

I would recommend understanding your problems and bottlenecks. Only then, you can go ahead to bring in a solution that would help you solve the issues and progress faster based on the organizational requirements.

— Data and Analytics Professional, Retail Sector

Another peer adds:
We would spend more time to gather business and functional requirements for the implementation of the solution. We would run a thorough metadata capability evaluation to figure out improvements.

— Data and Analytics Professional, Healthcare Sector

A peer further opines about gaining the support of all the key stakeholders:

We would build our data governance program and strategy ahead of time to gain business support before purchasing the solution. Without business involvement or some authority to compel them to provide content, the solution will just be an empty shell.

— Enterprise Architecture and Technology Innovation Professional, Finance Sector

Peer recommendations include:

- Identify pain points in the current metadata cycle. Execute a companywide metadata capability evaluation. Communicate this information to the end users while gathering requirements.

- Prepare a framework of the organization’s data governance strategy once the requirements are finalized.

- Create a well-thought-out roadmap that showcases realistic expectations and outcomes from the implementation of the solution by taking into account the demands of the evolving market situation.

- Ensure buy-in from all the key stakeholders to solidify the vendor selection process based on the organizational requirements.

Recommended reading:

Create a Business Case for Metadata Management to Best Fulfill Your Data and Analytics Initiatives
Lesson 2: Evaluate Metadata Use Cases to Gauge the Capabilities of the Available Vendors

The peers direct the data and analytics leaders to properly vet the established use cases to draw out holistic comparisons among the available vendors. This will enable the organization to shortlist a suitable vendor.

In this context, a peer states:

> Document use cases for metadata and prioritize. Weigh use cases and leverage as evaluation criteria to assess market offerings of the available vendors. Let this data enable the decision for you.

— Enterprise Architecture and Technology Innovation Professional, Energy and Utility Sector

Another peer remarks:

> Do your due diligence when selecting a vendor that impacts how you utilize your data. Data drives decisions and opens up possibilities. So, it is important that you feel comfortable with the solution you are utilizing.

— Data and Analytics Professional, Healthcare Sector

Peer recommendations include:

- Examine the use cases of the available vendors. Compare the strengths and weaknesses of the offerings of the vendors based on the results.

- Check the integration capabilities of the suitable solution with other extract, transform and load (ETL) software in the organization.

- Review the cost-benefit ratio before selecting a vendor to facilitate maximum yield.

- Ensure the solution is aligned with the findable, accessible, interoperable and reusable (FAIR) data principles.
Lesson 3: Establish a Data Governance Strategy to Ease the Implementation Process

The peers advise the data and analytics leaders to create and finalize a cohesive data governance strategy that sets rules for all the data cataloging that needs to be executed after the implementation of the metadata management solution. This will minimize any gaps in the workflow and data lineage as tracing the source of data files will be defined.

In this context, a peer remarks:

**Take the time to define your data governance strategy and ontology. No matter what the data catalog product, how you organize its data and how you govern it is the key to a successful implementation. You will see your organization shine in the world through this data practice.**

— Data and Analytics Professional, Service Sector

Another peer articulates:

**Prepare a good metadata management strategy where you can address the challenge by giving employees the ability to explore and better understand the commercial information they use in all their projects. It is important to understand that each image you upload contains potentially useful data. Information such as creation date, copyright, coordinates, camera settings often exist within the image. You can use it in all kinds of ways.**

— Analyst, Media Sector

Peer recommendations include:

- Devise the rules and processes regarding data cataloging to streamline the data management process.
- Define the roles and responsibilities of the end users in the governance strategy to ensure clarity upon implementation.

- Set up a database with the varied range of metadata criteria to facilitate the implementation of increased automation upon implementation.

- Create a data workflow map to streamline the management of data assets on cloud and on-premises infrastructure.

Recommended reading:

**5 Ways to Use Metadata Management to Deliver Business Value From Data**

**Lesson 4: Employ Professional Services to Implement the Solution; Appoint an Internal Team of Data Stewards**

The peers suggest leveraging the expertise of third-party professional services for the deployment of the solution in the organization. They further recommend assigning an internal team of data stewards to carry out the invaluable task of ensuring the organization's set data governance processes to the maximum.

Following is a peer's statement about hiring a team of professionals to deploy the solution:

> Hire experienced third-party professionals and consider what other applications can they help to integrate the solution with in your organization. Also, you’ll need a reporting layer above the professionals to update on your progress.

> — Technical Professional, Finance Sector

A peer then remarks about the importance of data stewards:
I would have a dedicated team of data stewards to better administrate the overall organization’s best practices — oversight of curation and implementation of the solution.

— Data and Analytics Professional, Unnamed Sector

Another peer highlights the importance of allocating subject-matter experts (SMEs) during the implementation:

When onboarding an application into the solution, work with the application’s SMEs throughout the scanning process in order to validate that the lineage output for the application is as expected. This will allow any possible lineage gaps to be identified and addressed immediately, and will ensure that what the end user sees in the browser is accurate.

— Application Professional, Finance Sector

Peer recommendations include:

- Onboard third-party professional services to deploy the optimum solution.
- Allocate an internal team of SMEs to ally with the professionals while integrating applications into the solution.
- Administrate a team of data stewards to ensure compliance with the governance strategy and organization’s best practices.

Recommended reading:

Critical Capabilities for Metadata Management Solutions

Methodology

Of the Peer Insights survey data considered for this market, only those responses meeting the following criteria were included in this synthesis:
Reviews less than 12 months old.

Responses that pertain to the project experience and are not tied to the capabilities of a vendor.

Reviews were clustered into the top-four most-referenced categories (lessons learned) and then listed in order of relevant phases in the project life cycle.

The results of this synthesis are representative of the respondent base and not necessarily the market as a whole.

“The data used in this report is drawn from reviews on Peer Insights, a crowdsourced enterprise review platform that relies on dynamic data. Key to maintaining the integrity of the site is our ongoing moderation and validation of those reviews. Reviews are examined before publishing to the site and periodically, post-publishing. Due to the dynamic nature of the data, the external Peer Insights site will always have the most updated view of the data in this report.”

Document Revision History

Peer Lessons Learned: Implementing Metadata Management Solutions - 19 January 2020

Recommended by the Author

Solution Criteria for Data Catalogs Supporting Metadata Management and Data Governance
Emerging Market Scenarios Are Driving a Renewed Focus on the Capabilities of Metadata Management Solutions
Accelerate Adoption of Enterprise Metadata Management Solutions by Improving Usability for the Business
How Tech CEOs for Metadata Management Solutions Should Differentiate Key Business Capabilities
How to Activate Metadata to Enable a Composable Data Fabric