

**Marketing Data**

**Governance Framework Template**

Implementing a data governance framework can streamline data management and ensure data integrity for marketing teams, but coming up with a framework from scratch can be an intimidating prospect.

Whether you are at the beginning of your data governance journey or feel it’s time to assess your current practices, here’s a handy data governance framework template you can use as a starting point for implementing new or updating your existing standards.

For more guidance, check out [What is a Data Governance Framework? A Guide
for Marketers](https://www.adverity.com/blog/what-is-a-data-governance-framework-a-guide-for-marketers)

### Customization tips:

* **Adjust policies:** Modify the policy documentation to reflect your organization's specific data handling practices and compliance requirements.
* **Set relevant data quality metrics:** Tailor data quality guidelines to align with your marketing goals, such as improving customer segmentation accuracy or campaign targeting precision.
* **Define roles based on team structure:** Customize stakeholder roles according to your marketing team’s size and structure, ensuring responsibilities are clearly assigned and understood.

**Marketing Data Governance Framework**

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##

## **Overview**

#### In this section, briefly clarify the framework's purpose and objectives.

| Purpose: |
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| *What is the purpose and what are the objectives of the framework, such as improving data accuracy, enhancing security, and supporting data-driven marketing strategies?* |

| Scope: |
| --- |
| *What is the scope of the framework, including the areas covered like data collection, usage, quality management, and compliance, and which data types are applicable?* |

| Initial steps: |
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| *What are the initial steps for assessing current practices and planning the new data governance framework?* |

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## **Data collection, usage, and security policies**

#### In this section, detail the different data governance policies that should be practiced.

| * 1. **Data Collection**
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| **What data will be collected?** | *Detail what data will be collected, such as customer demographics or purchase histories. Note any data that could be considered Personally Identifiable Information (PII).* |
| **Data collection methods** | *Detail what methods will be used for data collection, such as web forms, surveys, and CRM systems.* |
| **How will Consent be obtained?** | *Explain how consent will be obtained (i.e. a consent form on your website) and any requirements.* |

| * 1. Data Usage
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| --- |
| **How will data be used?** | *How will data, specifically PII data, be used in marketing campaigns, including segmentation and personalization?* |
| **Restrictions** | *Detail any restrictions that are in place for data usage, such as data that is for internal use only or data that cannot be shared with third parties.* |
| **Data retention** | *Explain the guidelines for how and if data will be retained, where it will be retained, and for how long.* |

| * 1. Data Sharing and Access
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| **Ownership** | *Is ownership of data access documented e.g. who is responsible for providing access to different data sources?* |
| **Data access** | *List which roles and departments should have access to which data, under what circumstances, and what sort of requirements they have.* |
| **Data transfer and security** | *Explain what data transfer protocols and security measures will be implemented and what the procedures are for sharing data with third parties, such as vendors and partners.* |

| * 1. **Compliance and Security**
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| **Data protection** | *Explain how the business or department will adhere to data protection regulations like GDPR and CCPA.* |
| **Security measures** | *Explain what security measures, such as encryption and secure access controls, will be used.* |
| **Data breach handling** | *Explain the procedures for handling data breaches or other data security-related incidents.* |

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## **Data quality guidelines**

#### In this section, explain how data quality will be maintained.

| * 1. **Data entry standards**
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| **Data Type** | **Standard Format** |
| *In this column, list out different data types such as dates or currency.* | *Define the standard format for each data type. For example, for dates, MM-DD-YYYY, DD-MM-YYYY, or whatever your preferred date format is. This is to ensure all your data is standardized.* |
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| * 1. **Data Validation**
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| **Validation rules** | *Explain any validation rules that will be applied to ensure data accuracy, including mandatory fields and format checks.* |
| **Data validation procedures** | *Explain how regular checks and audits to identify and correct data errors will be conducted.* |
| **Data validation tools** | *What tools will be used for data validation?* |
| **Maintenance and cleaning** | *Specify who will be responsible for removing duplicates, correcting errors, and updating outdated information and how often this will take place such as quarterly or annually.* |
| **Data consistency** | *Explain how uniform data formats and definitions will be ensured across systems and what procedures will be followed to resolve data discrepancies and conflicts.* |

## **Stakeholder roles**

#### This section should detail all the different roles and responsibilities within the organization or department.

| **Data Stewards** | *Specify who or what job role(s) are the point of contact for data-related issues.**List their responsibilities for overseeing data quality and compliance.* |
| --- | --- |
| **IT and data security personnel** | *Specify who or what job role(s) are responsible for implementing and maintaining data security measures.**List their responsibilities for managing data access controls and encryption.* |
| **Marketing team members** | *Specify how data should be used by the marketing team in campaign planning and execution.**List their responsibilities for adhering to data policies and guidelines.* |
| **Data analysts** | *Specify who or what job role(s) are responsible for ensuring data accuracy and providing insights.**List their responsibilities for data reporting and analysis.* |