

Chapter 1 Meridian Applied Lab

Data Management Baseline & Strategy

Sequence 007 • Main 00B Applied Laboratory • Companion to Main 00A Chapter 1 Mastery Package

 **LAB PURPOSE:** Make Chapter 1 visible as enterprise Data Management work: identify data assets, connect them to business value and risk, trace lifecycle responsibilities, separate data requirements from technology choices, and create a small business-aligned Data Management direction for Meridian.

How this lab fits the master execution path

Before this lab	This lab	After this lab
Sequence 005: Chapter 1 Guided Learning Sequence 006: Chapter 1 Mastery Package	Sequence 007: Meridian applied work—inventory, value/risk, lifecycle, requirements, strategy and enterprise prioritization	Sequence 008: Chapter 1 completion, real-error repair, spaced revisit and tracker update
 TECHNOLOGY GATE: None. Do not delay this Chapter 1 lab for SQL, PostgreSQL, Python or pandas. Use Google Docs/Sheets and diagrams.net if useful. Technology Gate A becomes mandatory only before Chapter 5.		

1. DMBOK concept targets

By completing this lab, you should be able to demonstrate—not merely define—the following Chapter 1 ideas:

- Data Management is broader than database or IT administration; it coordinates plans, policies, programs and practices across the data lifecycle to protect and increase data value.
- Data is an organizational asset with unusual properties, so value, inventory, protection, duplication, ownership and replacement must be managed deliberately.
- Data is representation and needs context; Metadata and Data Quality are foundational to understanding and using it.
- Data Management is cross-functional and requires an enterprise perspective, multiple stakeholder perspectives and leadership commitment.
- Data Management is lifecycle management and includes risk management; different data types can require different lifecycle treatment.
- Business-aligned data requirements should lead technology decisions rather than technology convenience defining the requirement.
- Data strategy and Data Management program strategy connect business goals to prioritized management capabilities and initiatives.
- The 11 Knowledge Areas are distinct but interdependent; Data Governance coordinates and provides direction without being identical to all Data Management.

 **SOURCE ANCHORS:** DAMA-DMBOK2 Revised, Chapter 1: definition/business driver/goals pp. 19–20; representation/assets/principles pp. 20–25; management challenges pp. 25–34; strategy pp. 34–35; frameworks/Knowledge Areas pp. 35–49.

2. Meridian business situation

Meridian Commerce Group is operating successfully, but its data estate grew faster than its management discipline. Systems support the business, yet shared data is inconsistently defined, governed, traced, protected and measured. Chapter 1 asks you to look above individual defects and decide what enterprise Data Management work is needed.

Meridian condition	What you observe	Chapter 1 lens
MCG-001 / MCG-002	CRM, POS and Service disagree about customer identity and even what “active customer” means.	Representation, enterprise perspective, Metadata, quality, governance coordination.
MCG-004	Executive revenue KPI cannot be traced quickly from dashboard to source/transformation.	Metadata/context, planning, lifecycle/lineage distinction, management value.

Meridian condition	What you observe	Chapter 1 lens
MCG-005	Null emails, duplicate customers, invalid product references, impossible quantities and stale addresses exist.	Fitness for purpose, value loss, risk, quality across lifecycle.
MCG-006	A reporting account can read synthetic sensitive customer attributes it does not need.	Risk, appropriate use, protection across lifecycle.
MCG-009	Many columns lack descriptions, owners, classifications or trustworthy source information.	It takes Metadata to manage data.
MCG-010	Issues are discussed but decision authority and escalation are inconsistent.	Enterprise coordination, leadership, governance relationship.

3. Prerequisite gate

Requirement	Ready when...
Chapter 1 source/mastery	You can explain Data Management, data-as-asset, lifecycle vs lineage, Metadata/Data Quality foundations, business-first technology decisions, and the 11 Knowledge Areas without simply rereading definitions.
Meridian orientation	You know the major business processes, systems, data domains and at least five initial messy-company conditions.
Tools	You can create/edit a document or spreadsheet and, if desired, a simple diagram. No database setup is required.
Evidence discipline	You will save your reasoning and outputs rather than only screenshots.
 STOP RULE: If you cannot explain the Chapter 1 concepts above, return to Sequences 005–006. Do not compensate by adding technology.	

4. Outcomes and evidence

Output	What it proves
A. Meridian Data Asset Inventory	You can connect data to business processes, systems, consumers and enterprise value.
B. Value & Risk Assessment	You can reason about data value without pretending DAMA supplies one universal price formula.
C. Lifecycle Management Map	You can distinguish lifecycle responsibilities from lineage and SDLC.
D. Business/Data Requirements Before Technology	You can state the management requirement before naming a tool.
E. Mini Data Management Direction Package	You can translate business goals into a Charter, Scope Statement and Implementation Roadmap at training scale.
F. Knowledge Area / Enterprise Map + DMBOK Debrief	You can connect Chapter 1 orientation to later chapters without collapsing them together.

5. Predict first — before making the inventory

Write your answers before opening detailed tables or deciding priorities. The point is to expose your current mental model.

1. Which three Meridian data domains do you expect to create the most enterprise value? Why?
2. Which three data domains do you expect to create the greatest enterprise risk if poorly managed? Why?
3. Which Meridian problem looks most “technical” at first glance but is actually broader than technology?
4. If Elena Park can fund only two Data Management initiatives this quarter, what would you choose before doing the rest of the lab?
5. What evidence would make you change those priorities?

 **DO NOT FIX YET:** Record your predictions. You will revisit them after the inventory, lifecycle and value/risk work.

6. Lab A — Build Meridian’s Data Asset Inventory

Select at least six data assets/domains. Include Customer, Product and Order, then choose at least three more. For each, connect the asset to why it exists, where it is represented, who uses it, and what makes it difficult to manage.

Asset / domain	Business process that creates/uses it	Key systems	Primary consumers	Value if well managed	Risk if poorly managed	Metadata/context needed	Criticality H/M/L
Customer	Browse-to-Order; Campaign-to-Engagement; Customer-Issue-to-Resolution	WEB / CRM / POS / SERV	Sales, Service, Marketing, Finance	[complete]	[complete]	Definition, identifiers, source, owner, allowed uses	[]
Product	Product-to-Sellable-SKU; Order-to-Fulfillment	PIM / WEB / OMS / DWH	Merchandising, Sales, Fulfillment, BI	[complete]	[complete]	SKU meaning, category, lifecycle status, source/owner	[]
Order	Browse-to-Order; Order-to-Fulfillment	WEB / OMS / DWH	Operations, Finance, Service, BI	[complete]	[complete]	Grain, status meaning, timestamps, source rules	[]
Choose #4	[complete]	[complete]	[complete]	[complete]	[complete]	[complete]	[]
Choose #5	[complete]	[complete]	[complete]	[complete]	[complete]	[complete]	[]
Choose #6	[complete]	[complete]	[complete]	[complete]	[complete]	[complete]	[]

Decision questions:

- Which assets are enterprise assets rather than merely “owned by one application”?
- Where does the same business concept have multiple representations?
- Which assets would be hardest to replace if lost?
- Which assets are easy to copy/share and therefore create control or privacy/security risk?
- Which assets cannot be interpreted correctly without stronger Metadata?

7. Lab B — Assess value, risk and management priority

⚠ IMPORTANT NUANCE: Chapter 1 does not prescribe one universal valuation formula. For this training lab, use consistent qualitative ratings and business reasoning. Label the method as a Meridian training method, not a DAMA standard.

For the same six assets, rate each factor High / Medium / Low and give a one-sentence reason.

Asset	Operational dependency	Decision / revenue benefit	Replacement difficulty	Quality-loss impact	Privacy/security / misuse risk	Enterprise reuse	Overall priority	Reason
Customer	[]	[]	[]	[]	[]	[]	[]	[reason]
Product	[]	[]	[]	[]	[]	[]	[]	[reason]
Order	[]	[]	[]	[]	[]	[]	[]	[reason]
#4	[]	[]	[]	[]	[]	[]	[]	[reason]
#5	[]	[]	[]	[]	[]	[]	[]	[reason]
#6	[]	[]	[]	[]	[]	[]	[]	[reason]

Then answer: What changed from your predictions? Which asset moved up or down in priority, and what evidence caused the change?

8. Lab C — Trace lifecycle responsibilities (not just lineage)

Choose Customer plus one other asset. Map how each is planned/defined, created or obtained, stored, moved/transformed, used, maintained/enhanced, shared and eventually retained/disposed. At every stage, note a quality, Metadata or risk responsibility.

Lifecycle stage	Customer — what happens?	Quality / Metadata / risk concern	Second asset — what happens?	Quality / Metadata / risk concern
Plan / define	[complete]	[complete]	[complete]	[complete]
Create / obtain	[complete]	[complete]	[complete]	[complete]
Store	[complete]	[complete]	[complete]	[complete]
Move / transform	[complete]	[complete]	[complete]	[complete]
Use	[complete]	[complete]	[complete]	[complete]
Maintain / enhance	[complete]	[complete]	[complete]	[complete]
Share	[complete]	[complete]	[complete]	[complete]
Retain / dispose	[complete]	[complete]	[complete]	[complete]

🔑 DECIDING DISTINCTION: Lifecycle asks what management stages/events data passes through. Lineage asks where a particular data set came from, how it moved/changed and where it went. SDLC is the development lifecycle of a system/solution.

9. Lab D – State the business/data requirement before naming technology

For each problem, write the requirement first. Only after the requirement is clear may you suggest a supporting tool or implementation technique.

Meridian problem	Business/data requirement (write first)	Possible supporting technology later	Why technology alone is insufficient
MCG-002 Active customer definition conflict	[complete before naming a tool]	[optional]	[complete]
MCG-004 Revenue KPI cannot be traced	[complete before naming a tool]	[optional]	[complete]
MCG-006 Over-permissioned analyst	[complete before naming a tool]	[optional]	[complete]
MCG-009 Weak metadata	[complete before naming a tool]	[optional]	[complete]
 EXAM/APPLICATION TRAP: “Install a tool” is not a complete Data Management requirement. First state the business meaning, quality, access, lifecycle, ownership, traceability or risk outcome that must be achieved.			

10. Lab E – Build a mini Data Management direction package

Create three distinct artifacts. They are related but not interchangeable. Keep them concise: this is a training-scale exercise, not a full corporate strategic plan.

10.1 Mini Data Management Charter – mandate and intent

Charter element	Your Meridian content
Vision	[What should better-managed data enable?]
Business case	[2–3 concrete examples of value, waste, risk or lost opportunity]
Guiding principles	[Choose 4–6 Chapter 1 principles and translate them into Meridian behavior]
Long-term direction	[What capabilities should Meridian build?]
Measures of success	[How will leadership know the program is improving outcomes?]
Leadership / operating intent	[Who sponsors; how business + technical roles collaborate]
Recognized risks	[What could prevent success?]

10.2 Scope Statement – what is in the planning horizon and who is accountable

Scope decision	Your Meridian content
In scope	[Domains, processes, capabilities or problems]
Out of scope for this increment	[What is deliberately deferred and why]
Goals / objectives	[3–5 concrete objectives]
Accountable roles / groups	[Business + data + technical participants]
Dependencies / assumptions	[What must be true for this scope to work]

10.3 Implementation Roadmap – prioritized work and milestones

Create 4–6 initiatives. Do not make the roadmap a shopping list of software.

Priority	Initiative	Business/data problem addressed	Lead + supporting DMBOK areas	Key dependency	Evidence of progress
1	[initiative]	[problem]	[areas]	[dependency]	[evidence]
2	[initiative]	[problem]	[areas]	[dependency]	[evidence]
3	[initiative]	[problem]	[areas]	[dependency]	[evidence]
4	[initiative]	[problem]	[areas]	[dependency]	[evidence]
5	[optional]	[problem]	[areas]	[dependency]	[evidence]

 **MEMORY HOOK:** Charter = mandate/vision/business case. Scope Statement = planning-horizon boundaries, goals and accountability. Roadmap = programs/projects/assignments/milestones that implement the direction.

11. Lab F – Map Meridian problems to the DMBOK without collapsing the Knowledge Areas

For each condition, choose one lead Knowledge Area and 1–3 supporting areas. Explain why the lead area is primary for the stated problem. There can be more than one defensible answer if the problem is reframed; your reasoning must make the scope clear.

Condition	Lead Knowledge Area	Supporting areas	Why the lead is primary	What Chapter 1 contributes
MCG-001 Customer identity conflict	[choose]	[choose]	[reason]	Enterprise perspective; representation; shared value/risk.
MCG-004 Unknown KPI lineage	[choose]	[choose]	[reason]	Metadata/lifecycle context; business value; planning.
MCG-005 Quality defects	[choose]	[choose]	[reason]	Fitness for purpose; value loss; lifecycle responsibility.
MCG-006 Over-permissioned analyst	[choose]	[choose]	[reason]	Risk/protection as part of managing the asset.
MCG-010 Governance ambiguity	[choose]	[choose]	[reason]	Enterprise coordination, leadership and governance relationship.

12. Break / vary the situation

 **CHANGE ONE FACT:** Meridian acquires a small regional retailer. A fourth customer platform and a second product-category hierarchy arrive immediately. Leadership can fund only two major Data Management initiatives in the next program increment.

- Re-rank your top five data-management priorities.
- Identify which assumptions in your original asset inventory are no longer true.
- State which risks increased and why.
- State which business/data requirements must be clarified before any integration technology is selected.
- Explain whether your Charter changes, your Scope Statement changes, your Roadmap changes—or all three. Be specific.

13. Repair / decide

Produce a revised priority decision for Elena Park. Your decision must connect the acquisition change to enterprise value, risk, lifecycle, Metadata/quality needs, cross-functional accountability and business-aligned technology requirements.

Decision component	Your answer
Top two funded initiatives	[initiative + reason]
Deferred work	[what waits + consequence]
Leadership decision needed	[decision rights / sponsorship / conflict]
Evidence you will collect next	[what would validate or change the decision]
Technology decision intentionally postponed	[what requirement must be known first]

14. Rebuild independently — remove the template

Close this guide. From a blank document or whiteboard, rebuild a smaller equivalent of the Chapter 1 work without copying the tables:

- Name five Meridian data assets and explain why each is an enterprise asset.
- Rank the five by value/risk and defend the ranking.
- Draw one data lifecycle and label at least four management responsibilities across it.
- Take one messy-company issue and state the business/data requirement before the tool.
- Recreate the distinction among Charter, Scope Statement and Roadmap.
- Name the lead Knowledge Area for three Meridian issues and one supporting area for each.

 **INDEPENDENCE GATE:** You do not need to reproduce the exact wording or table design. You do need to reproduce the reasoning structure and explain why each step is Data Management work.

15. Save / prove — evidence checklist

Store the evidence in Main 00B → 06 — Evidence, Portfolio, Trackers & Templates, or link it from the Master Tracker. Suggested names:

- CH01-A — Meridian Data Asset Inventory
- CH01-B — Value & Risk Assessment
- CH01-C — Lifecycle Management Map
- CH01-D — Business/Data Requirements Before Technology

- CH01-E — Data Management Charter, Scope & Roadmap
- CH01-F — Knowledge Area Map & DMBOK Debrief
- CH01-G — Acquisition Change-Fact Revision

Update the tracker only after you can explain the evidence. A screenshot without reasoning does not satisfy the lab.

16. Closed-book DMBOK debrief — answer before reading the key

17. Why is Meridian's customer problem a Data Management problem even before you decide which system should store a trusted customer record?
18. Why does an inventory of data assets need business-process, consumer and Metadata context rather than only a list of tables?
19. How did the value/risk exercise demonstrate that data differs from a physical asset?
20. Explain lifecycle vs lineage using one Meridian data asset.
21. Give one example where a business/data requirement should be settled before a technology decision.
22. Why are the Charter, Scope Statement and Roadmap three different artifacts?
23. Why can Data Governance be central without being the same as all Data Management?
24. What changed in your priorities after the acquisition scenario, and which Chapter 1 principle explains the change best?

17. Reconstruction / answer key

 USE THIS AFTER ATTEMPTING SECTION 16: The key gives the expected reasoning pattern. Your Meridian-specific examples can differ if they stay consistent with the Casebook and Chapter 1.	
#	Expected reasoning pattern
1	The customer issue spans definitions, representation, quality, enterprise reuse, risk, lifecycle and cross-functional decisions. Choosing a database does not resolve business meaning, stewardship, quality or appropriate use.
2	Data is abstract and context-dependent. Knowing a table exists does not explain why the data exists, what it means, who depends on it, how valuable it is, what risks attach to it, or how it should be managed.
3	The same data can be reused, copied, shared and used by many people without being consumed; value depends on use and context. Replacement difficulty and risk can be high even though there is no physical object to wear out.
4	Lifecycle describes management stages/events across the asset's life. Lineage follows a particular data set from origin through movement/transformation to use. Example: customer lifecycle includes definition/capture/use/maintenance/disposal; customer lineage traces CRM/POS/SERV through transformations to a report or master view.
5	Examples include defining "active customer" before selecting a master-data tool; defining KPI meaning/traceability requirements before catalog/BI tooling; deciding least-privilege business need before configuring roles.
6	The Charter sets mandate, vision, business case and overall intent. The Scope Statement defines planning-horizon boundaries, goals and accountability. The Roadmap sequences initiatives/projects/milestones used to implement the direction.
7	Governance coordinates direction, decision rights, policy and oversight across the discipline. Architecture, Modeling, Storage, Security, Integration, Content, Master/Reference, Warehousing/BI, Metadata and Quality remain distinct work.
8	A defensible answer connects the acquisition to enterprise perspective, planning, lifecycle/risk, Metadata/quality or leadership commitment. The key is explaining why a changed business situation changes Data Management priorities.

18. Completion rubric

Dimension	Not yet	Working	Complete for Sequence 007
DMBOK explanation	Names terms but cannot explain the business reason.	Explains most Chapter 1 concepts with prompting.	Explains asset/value, lifecycle, Metadata/quality, enterprise perspective, strategy and

Dimension	Not yet	Working	Complete for Sequence 007
			business-first technology decisions in DAMA-aligned language.
Applied reasoning	Copies the template or ranks assets without reasons.	Completes tables and gives basic reasons.	Uses business process, consumer, value, risk, lifecycle and context evidence to justify priorities.
Technology independence	Answers with a tool before stating the requirement.	Usually states requirements first.	Can explain why a tool supports—but does not define—the Data Management requirement.
Transfer	Only handles the original case.	Can respond to the acquisition change with some prompting.	Reprioritizes coherently when the facts change and explains which Chapter 1 principles drove the change.
Evidence	Missing or screenshot-only.	Artifacts exist but rationale is thin.	Artifacts + decisions + reasoning are inspectable and linked in the tracker/evidence area.
✓ DONE WHEN: You can justify Meridian's Data Management priorities without the template, explain why the work is broader than IT administration, and translate every major lab output back into Chapter 1 terminology.			

19. Source and implementation notes

- Controlling DAMA source: DAMA-DMBOK2 Revised, Chapter 1: Data Management, pp. 19–49. The lab paraphrases the chapter; it does not create new DAMA rules.
- Meridian source: Meridian Commerce Group — Enterprise Data Management Casebook, especially company profile, processes, systems, data domains and MCG-001 through MCG-012.
- The High/Medium/Low prioritization method, acquisition change-fact, specific evidence filenames and training-scale deliverable templates are Meridian instructional designs—not DAMA-prescribed formats.
- No SQL/Python/PostgreSQL competence is required for Sequence 007. A later technology gate is intentionally separate from this Chapter 1 management lab.
- If this lab exposes a real misconception, record it for Sequence 008 Error Repair. Do not pre-fill a generic Chapter 1 error-repair artifact.