

How Teachers Mutual Bank Builds Data Trust and Insights with Alation



Industry: Financial Services
Headquarters: Homebush, New South Wales, Australia
Use Case: Data Discovery, Data Governance

Challenge: Tackling data silos and governance gaps

Lisa Garbutt, the data governance manager at Teachers Mutual Bank in Sydney, Australia, lives by a mantra: “Data governance is about trust in data. You can’t run a bank without good data or trusted data.” When she began working at Teachers Mutual, she found that data users faced significant challenges in trusting data, which was critical for making effective business decisions. Data teams had no reliable visibility into data lineage, leading to uncertainty about the implications of changes to reports and data flows. Knowledge about data was locked in the heads of long-tenured individuals rather than in a centralised repository that anyone could tap.

The bank had minimal governance structures, and legacy systems were disconnected, which resulted in inconsistent decision-making and a lack of formal data stewardship. A recent audit revealed substantial gaps in data governance and management, prompting the need for a comprehensive solution to address these shortcomings.

The lack of formal data governance at Teachers Mutual stemmed from the bank’s unusual growth story. Founded by teachers in 1966 to create their own credit union, Teachers Mutual evolved organically from an educator-only focus to five separate divisions providing banking services to teachers, first responders, healthcare professionals, essential workers, and university students. Today, the bank is one of the largest mutual banks in Australia, serving over 230,000 members.

Like all financial institutions, Teachers Mutual needed to comply with government regulations concerning privacy and the management of personally identifiable information (PII), especially in the context of an increasingly digital-focused banking environment. “We needed greater visibility across the entire landscape of our data, we needed to create a data community, and we needed to establish data stewardship,” says Garbutt. Only then could the bank develop a [robust governance framework](#) to ensure regulatory compliance and consistent data management practices across the organisation.



We had a real challenge just understanding which systems had PII data, and there were duplications and inconsistencies across the organisation. Alation’s Policy Centre and workflow tools were crucial for our needs.



Lisa Garbutt
Data Governance Manager
Teachers Mutual Bank

Objectives

Teachers Mutual Bank sought to develop a comprehensive governance framework and build trust in data by pursuing the following objectives:

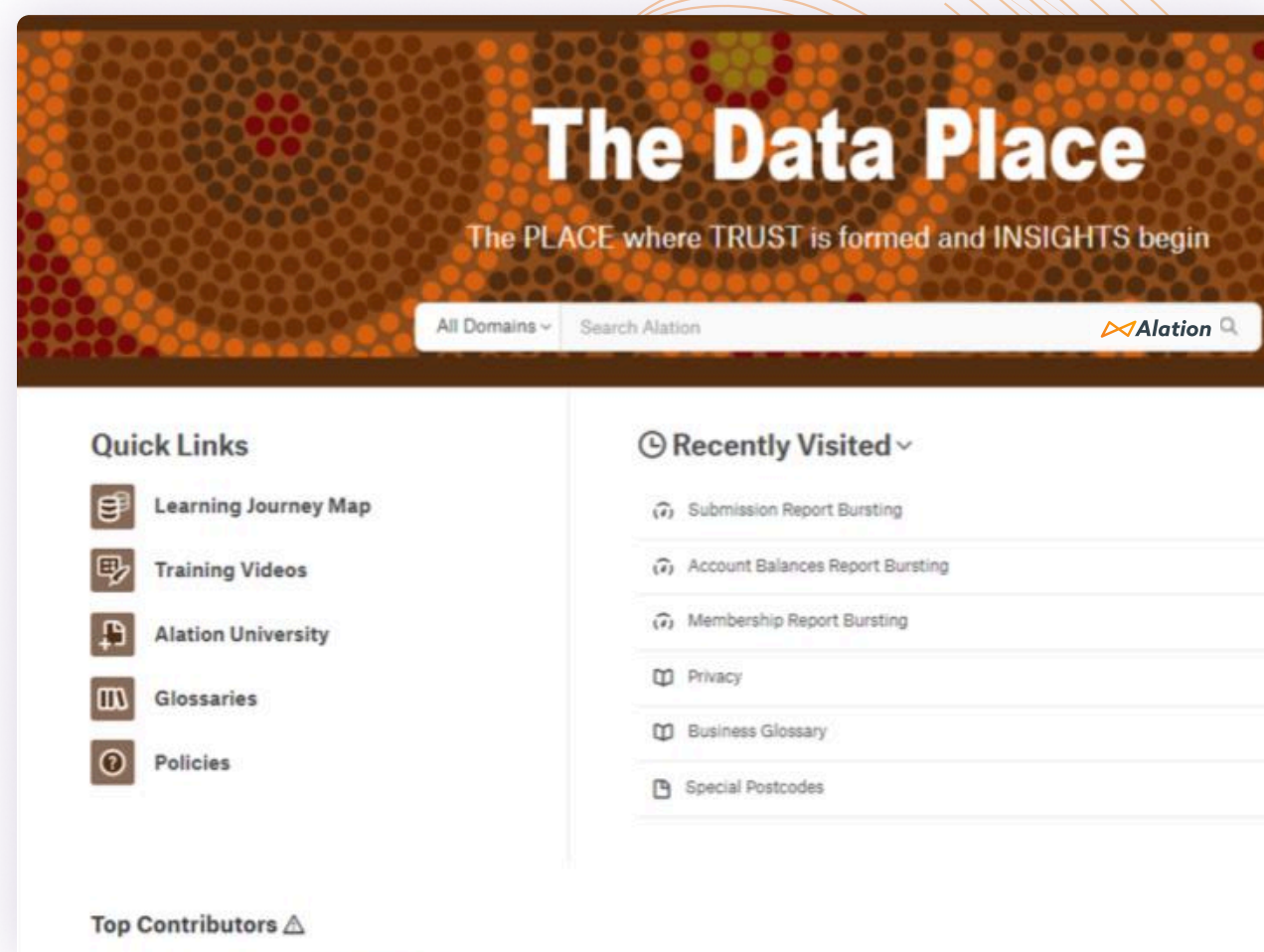
- Enhance visibility into data lineage to ensure changes could be tracked and implications understood
- Ensure regulatory compliance, particularly around data privacy, through improved data management practices
- Create a central data-knowledge repository and data community to reduce reliance on individuals’ knowledge

Implementation: Laying a foundation for data trust and insight

Teachers Mutual Bank selected the Alation Data Intelligence Platform based on its strong governance feature set, collaborative capabilities, and superior user experience compared to other data governance solutions. “We had a real challenge just understanding which systems had PII data, and there were duplications and inconsistencies across the organisation,” says Garbutt. “Alation’s Policy Centre and workflow tools were crucial for our needs.”

Garbutt has fostered a collaborative data community by drawing inspiration from the Aboriginal concept of "The Dreamtime," where individuals share knowledge and wisdom, preserving it collectively for the entire community.

In this spirit, the bank named Alation “The Data Place,” with the tagline “The PLACE where TRUST is formed and INSIGHTS begin.”



Teacher’s Mutual has coined its data catalog “The Data Place” and customized its homepage to surface high-value information to catalog users.

The bank now has a centralised glossary in Alation to provide consistent definitions across divisions and domains. Alation's lineage features allow the bank to map out data flows and dependencies, which are crucial for understanding the impact of changes and ensuring accurate regulatory reporting. Finally, thanks to the the Alation Policy Centre, users gain visibility into PII across the bank's systems, which is essential for compliance as well as trust in data.

Garbutt is confident that Alation will provide the foundation for strong data stewardship and a sense of community around data. "My philosophy is that if you're touching data and you're working with data, then you're a steward," she says.

Results: Building collaboration, community, and compliance

Garbutt describes a renewed confidence and trust in data since implementing Alation. "The Data Place really is where trust is formed, and insights begin," she says. Alation, (or the Data Place, as it's internally known) provides the foundation for improved data governance throughout the bank. "Just in terms of our data glossary, it's really well structured. We've got governance over it and visibility into consistent definitions." Alation's lineage features make it easier to perform impact analysis and trace data quality issues, improving overall data management.

Following the bank's poor audit performance, Garbutt and her team positioned Alation as one of the tools they would employ to address the audit's findings. By leveraging Alation's PII tagging capabilities, the team significantly improved recent audit results, particularly those relating to privacy compliance.

Garbutt has seen a noticeable improvement in efficiency. People are able to find data without relying on key individuals, which has reduced bottlenecks and streamlined processes. There is also a greater sense of community and collaboration, as people are encouraged to ask their questions in Alation instead of in Zoom Chat or email.

“This shift has really uplifted the community spirit around the Data Place, which is why we chose that name in connection with the Indigenous concept of collaboration, knowledge sharing, and creating a knowledge centre,” notes Garbutt.

“What excites me is seeing the entire scope come together,” she continues. “Getting that stewardship in place and being able to say to people, ‘Hey, look at this!’ is amazing. Even though a lot of the work has been happening quietly in the background – curation, governance, and everything else – it’s so exciting to finally be able to say, ‘This is incredible. Look at what we’ve all accomplished.’”

About Teachers Mutual Bank Ltd.

Teachers Mutual Bank Limited is one of Australia's largest mutual banks, serving over 230,000 members across the education, fire and emergency services, and health sectors. Established in 1966 by teachers for teachers, the bank is committed to ethical banking, offering a wide range of financial products and services tailored to professionals in service-oriented fields. As a member-owned institution, Teachers Mutual Bank reinvests profits to enhance member benefits, while maintaining a strong focus on community support and sustainability. The bank operates under multiple brands, including Teachers Mutual Bank, UniBank, Firefighters Mutual Bank, Hiver, and Health Professionals Bank. Teachers Mutual Bank Limited has been named one of the World’s Most Ethical Companies® for 10 years in a row since first receiving the honour in 2014.

Data Environment:

