

# HOW TO GET BETTER AT CORPORATE ANALYTICS

## Phase 1: INVESTMENT

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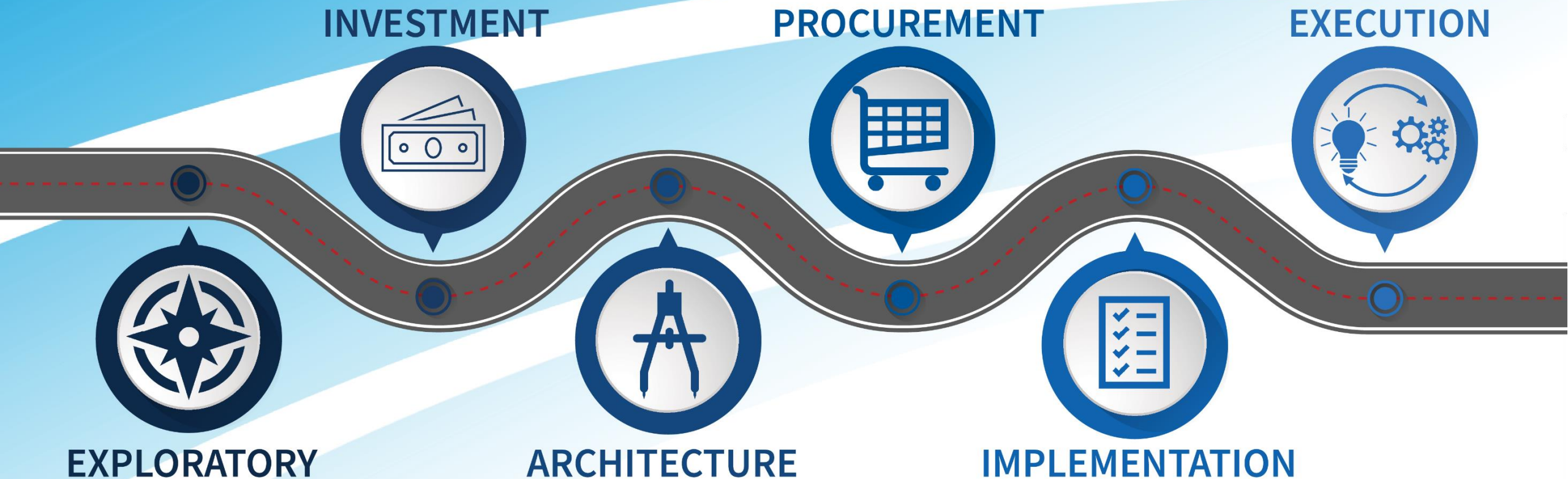
Practice Leader,

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Data Strategy Group

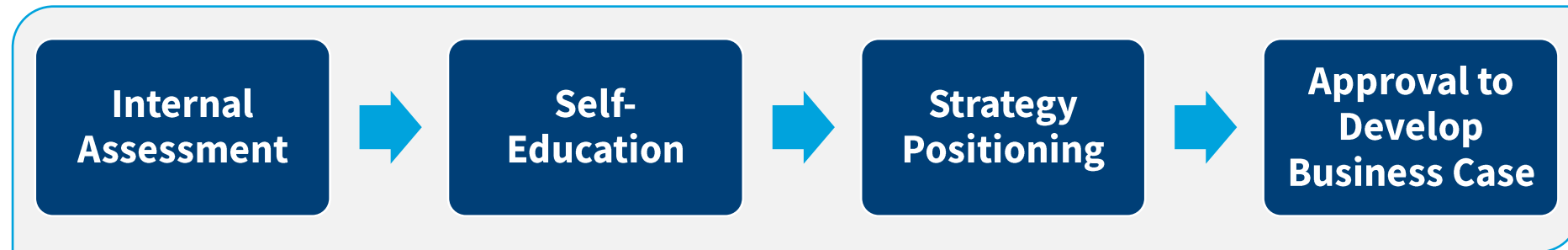
05.24.2022

# HOW TO GET BETTER AT CORPORATE ANALYTICS



# GETTING STARTED

## Data Strategy Phase 0: **‘EXPLORATORY’**



Defined Data Strategy

# Outputs from Phase 0

## Internal Assessment Artifacts



Strategic priorities for analytics



Inventory of analytics already happening



Pain points with data management

## Self-Education Artifacts

### Organizational Data Strategy Position Paper

**DRAFT**

- Industry Trends
- Our Organization's Strategic Priorities
- Capabilities Assessment
  - Inventory of analytics happening now
  - Data management opportunities for improvement
  - Talent assessment (high level)
- Strategic position statement (**Direction oriented**)
- Value proposition (**ROI oriented**)



Operational  
Definitions



Sponsor  
Feedback

## Approval to Develop Business Case

### The Goals:

- 1) Gain executive agreement on your organization's need for a formal data strategy,
- 2) Secure durable executive sponsorship, and
- 3) Get approval to develop a full business case to invest in the data strategy.

### The Ask:

- Executive approval of your refined data strategy Position Paper, and
- Executive approval to develop a full business case for your data strategy in **Phase 1: Data Strategy Investment.**



# HOW TO GET BETTER AT **CORPORATE ANALYTICS**

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INVESTMENT



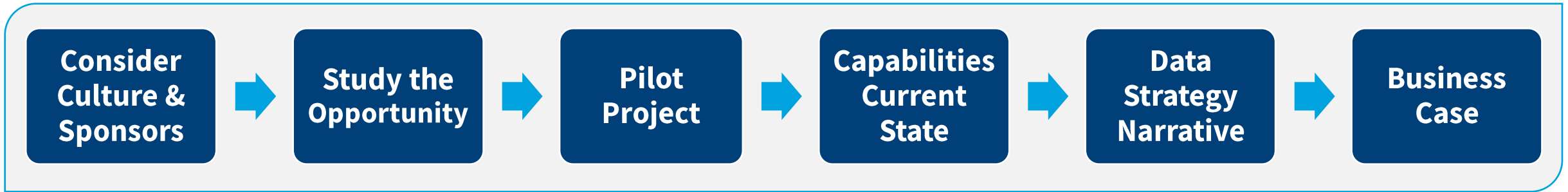
EXPLORATORY

# Data Strategy Phase 1: **INVESTMENT**

***‘Develop a self-funding business case  
and get approved funding to launch your data strategy.’***

***‘Surface analytics use cases, monetize them,  
and manage them as an investment portfolio.’***

# Data Strategy Phase 1: **INVESTMENT**



Approved Funding & Resources

# Consider Culture & Sponsors

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# Consider Culture & Sponsors: Key Questions

## Consider Culture

*‘How will you implement better analytics capabilities given your organizational culture?’*

## Generate Sponsorship

*‘How will you secure and sustain buy-in and approval from the appropriate authorizing sponsors?’*

# ‘Analytics is change management.’

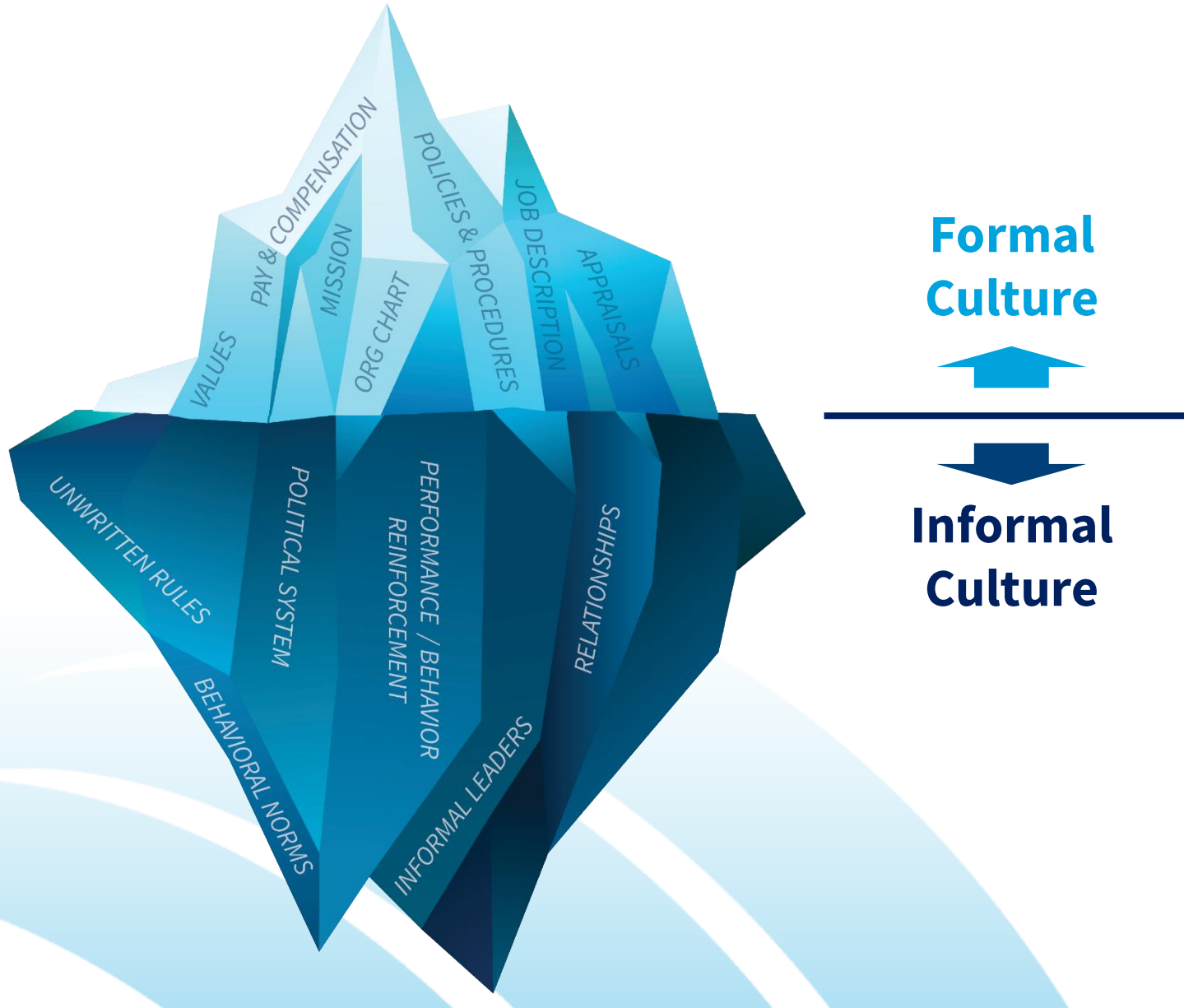
-Matthew Croucher, Director Enterprise Data & Analytics, Entergy

# ‘Analytics without behavior change is just expensive artwork.’

-Matthew Halliday, Co-Founder, Incorta

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# Culture and Implementing Analytics



**Formal  
Culture**



**Informal  
Culture**



Installing analytics  
platforms isn't  
necessarily that hard.

But implementing change in  
a culture to *embrace*  
analytics can be **very** hard...

...because getting value  
from analytics usually  
requires behavior change.

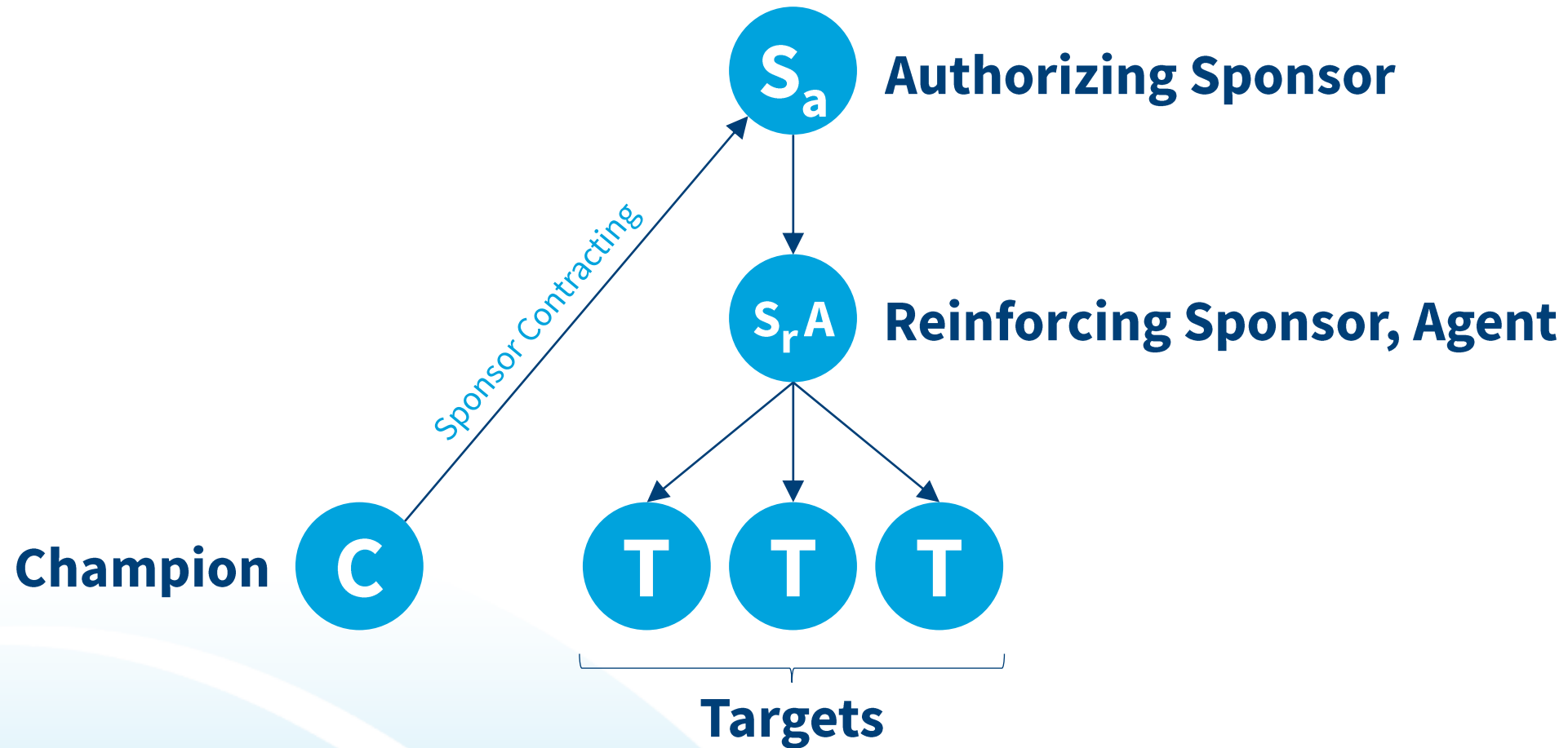
# cultural challenges with data analytics & digital transformation

“Some obstacles, such as **workers’ fear of becoming obsolete**, are common across organizations. But a company’s culture may also have distinctive characteristics that contribute to resistance. For example, if a company has relationship **managers who pride themselves on being attuned to customer needs**, they may reject the **notion that a machine could have better ideas** about what customers want and ignore an AI tool’s tailored product recommendations. And managers in large organizations who believe their **status is based on the number of people they oversee** might object to the decentralized decision making or reduction in reports that AI could allow. In other cases, **siloed processes can inhibit adoption** of AI.

## Generating Sponsorship: 'CAST of Characters'

- C Champions** ► Want the change.
- A Agents** ► Implement the change.
- S Sponsors** ► Authorize & legitimize the change.
- T Targets** ► Must change behavior for initiative to be successful.

# Example Sponsorship Model



*The right sponsors reinforcing the right behaviors in the organization.*

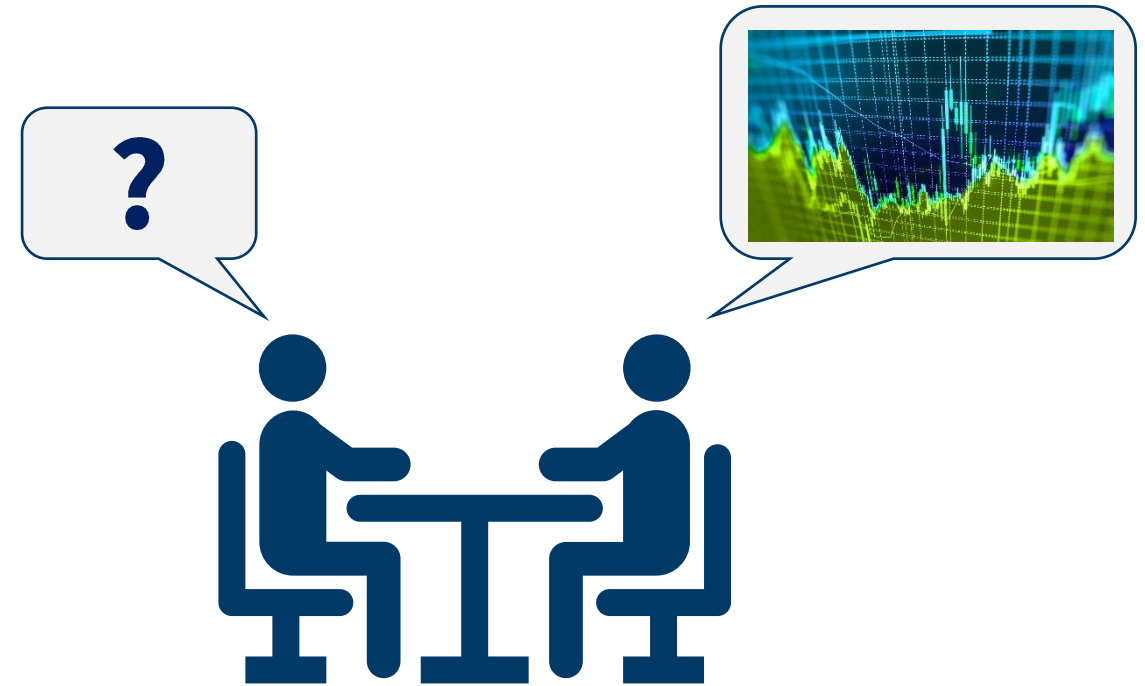


# Study the Opportunity

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# Study the Opportunity

- Secure approval to study the opportunity. (Phase 0)
- Surface analytics use cases from across the enterprise.
- Develop your use case portfolio.
- Identify candidate pilot projects.
- Research approach for pilot capabilities demonstration.
- Solicit feedback and ensure alignment with your key sponsor.



**Talk to Colleagues  
to Surface Use Cases**

# Key Concept: 'Use Cases'



## use case

*noun*

a specific situation in which a product or service could potentially be used.

"there are lots of use cases for robotic hardware, from helping disabled users to automating factories"



*We want to surface analytics use cases.*

# Use Cases Starting Point

## Outputs from Phase 0


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### Self-Education Artifacts

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 Sponsor Feedback

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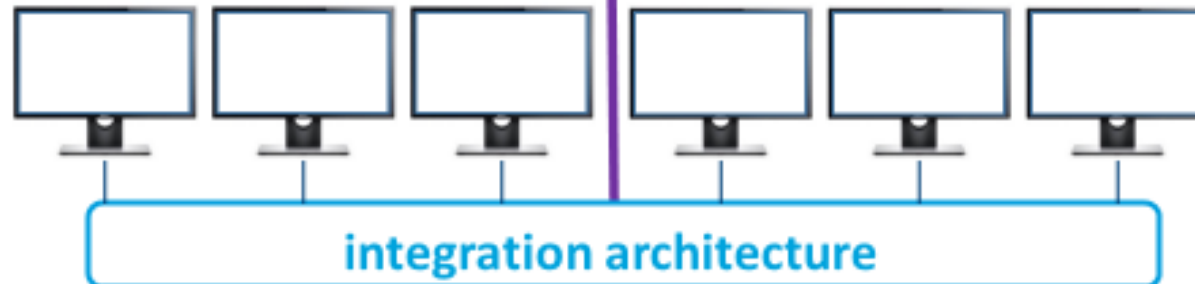


**Initial  
Analytics  
Use Case  
Portfolio**

# Use Case Focus Groups & Workshops

*if you had all the data you wanted at your fingertips ...*

1. new function or report would be...
2. opportunity it introduces or problem it solves is...
3. the benefit would be ...



# Use Case Portfolio Management

High Value Analytics Use Cases					
Use Case Name	Use Case Description	Business Result Sought	Benefit Type	Benefit Value	Relevant Business Processes / Functions
<b>Low Income Rate Analysis</b>	Rate assistance for low income customers that are seniors or a family member is dependent on an electric medical device. How can we forecast the applicants that are eligible for this rate assistance?	Predict Low Income Assistance	Customer Satisfaction		
<b>C&amp;I Customer Financial Risk</b>	How can we predict businesses most likely to declare bankruptcy?	Reduce Write offs	\$		
<b>TOU Rate opt-in</b>	How can we predict businesses or residents most likely to shift load based on rate time of use price signals?	Reduce Peak Demand	\$		
<b>EV Adoption</b>	How can we predict residents most likely to adopt electric vehicles or businesses most likely to offer work place charging for employee's electric vehicle.	Increase Revenue	\$		
<b>TOU Rates Adoption</b>	Residential customer market research is being conducted to understand the various segments in order to position to offer Time of Day rates as a tool for load management. The research involves data analysis that is harvested from various systems.	Increase Program Adoption	Reliability		

ILLUSTRATIVE



*populate and rank the portfolio*



# Tips for Use Cases Portfolio Management

- Manage use cases as a self-funding investment portfolio (fast payback).
- Prioritize use cases in alignment to company strategy & benefits to be realized.
- Identify business SMEs.
- Conduct workshops to further detail priority use cases.
- Identify first use case to start with and begin (Pilot).
- Focus on critical data curation required for use cases.
- Deliver use cases with minimal investment in technology needed.
- Meet regularly with sponsors to report progress, seek direction.

*Develop use cases, deliver value.*

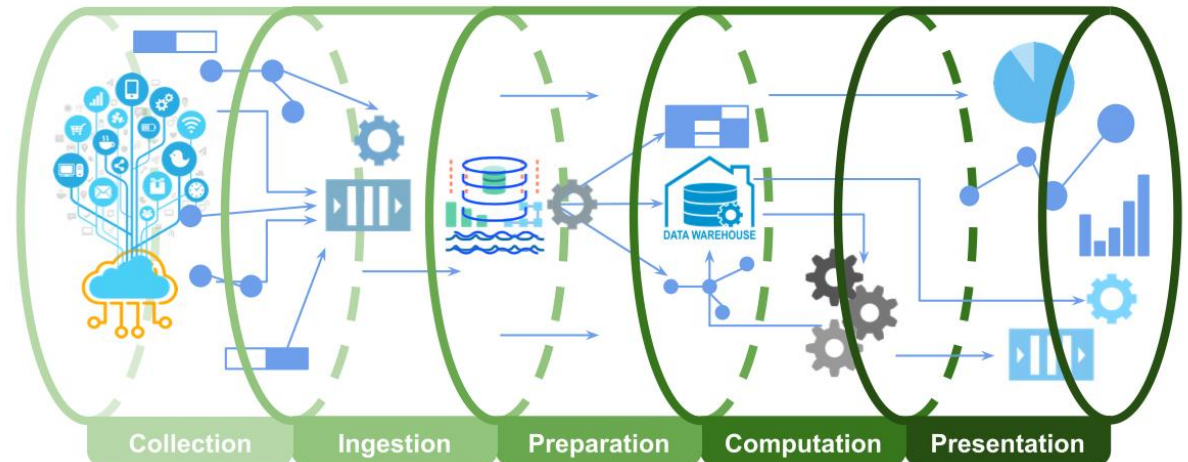
# Pilot Project

# Pilot Project

- Select pilot use case(s).
- Choose your team wisely.
- Demonstrate ability to implement platforms & tools.



**Build a Strong  
Nucleus of  
Team &  
Technology**



# Pilot Project

- Manage expectations – pilots aren't about ROI per se.
- Showcase key technologies that will extend to other priority use cases.
- Get the authorizing sponsors to see the potential further investment will bring.



**Guide  
Sponsors to  
See the  
Potential**

# Capabilities Current State

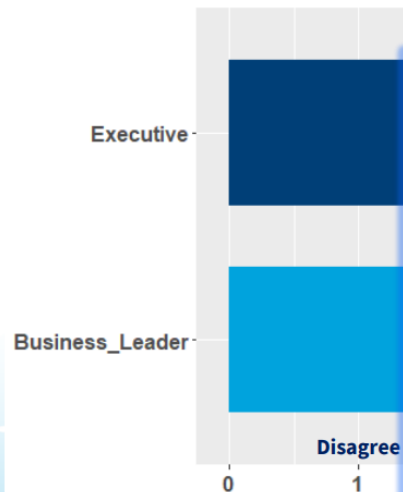
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# Capabilities Current State

survey and follow-up methodology to identify an organization's current data and analytics capabilities

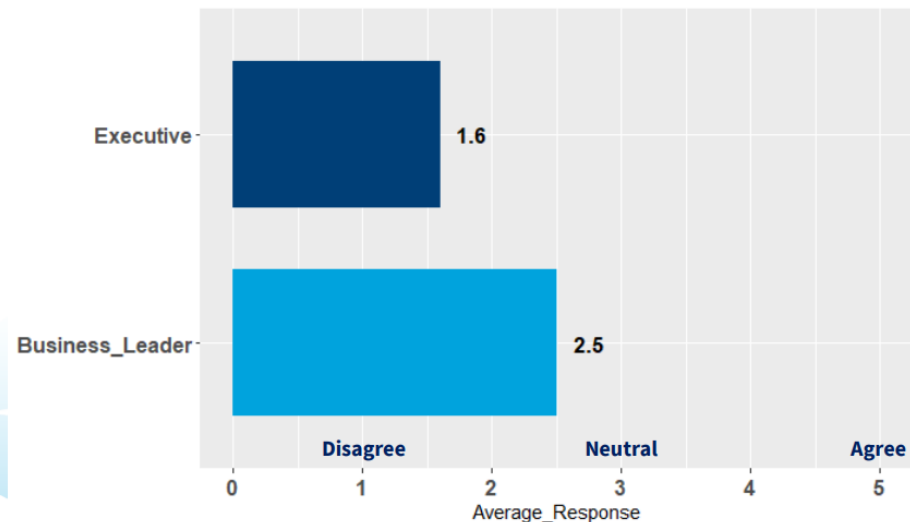
## Question 1

"I have all the data I need to make decisions."



## Question 3

"We are tapping the full potential of our organization's data."



## Question 5

"We have the internal talent we need to compete on analytics."



## Question 7

"The biggest barrier to progress on data analytics is..."

### Executive Cohort

Technology, people, and system connectivity.

Silos culture.

Proper personnel to assess the adequacy of our internal information, digest our information from numerous sources, then present to decision makers in a concise, consistent manner.

Not asking these questions, meaning asking feedback to help develop a strategy is the start.

I do not know the dynamics, but possible barriers could be reluctance to make the necessary investment and staffing issues. Staffing issues could be related to time or not having the necessary expertise.

Having appropriate resources to dig into the information that we have. Many new programs and resources are cost prohibitive.

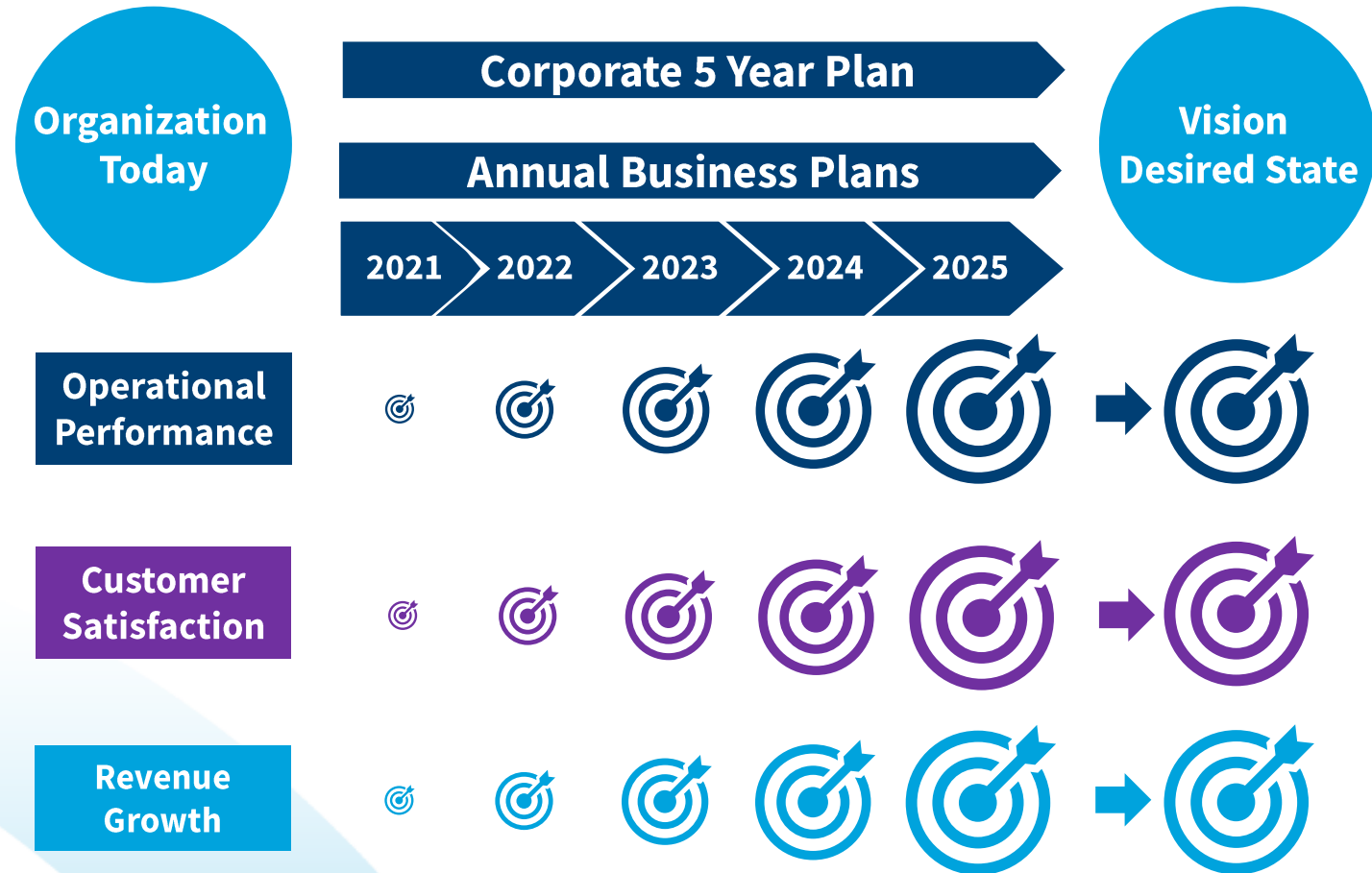
Alignment.



# Data Strategy Narrative

# Data Strategy Narrative

- Vision for the analytics capability
- Value proposition & benefits to the organization
- Demonstrate alignment to corporate strategy



*‘Your corporate strategy is your data strategy.’*

# Data Strategy Narrative

- Organizational design structure
- Required platforms & tools
- Multi-year roadmap for implementation driven by corporate strategy

Data & Analytics 5-Year Plan						
Capability	Purpose	2021 Baseline	2022	2023	2024	2025 - 2026
<b>Use Case Portfolio Management</b>	<i>Investment prioritization approach to maximize business value from data and analytics projects.</i>	<b>Articulate the Value of Analytics</b> - Use Case Backlog Established - High-level Business Case Identified	<b>Implement Use Case Portfolio Management</b> - Execute on 30 Use Cases	<b>Manage Use Case Portfolio</b> - Ongoing Use Case Execution - Benefits Realization Tracking	<b>Manage Use Case Portfolio</b> - Ongoing Use Case Execution - Benefits Realization Tracking	<b>Manage Use Case Portfolio</b> - Ongoing Use Case Execution - Benefits Realization Tracking
<b>Enterprise Data Warehouse</b>	<i>Brings together critical data, from multiple sources, in an organized way, to support organizational reporting.</i>	<b>Architecture Established</b> - EDW	<b>Initial Data Loads:</b> - Customer - Asset and GIS - Electric Consumption	<b>Incremental Data Loads:</b> - Financials - Water Meter & EAM	<b>Incremental Data Loads</b>	<b>Incremental Data Loads</b>
<b>Technology Architecture</b>	<i>Secure and scalable platform to support analytics. Key elements include: integration, data quality &amp; data science tools, and compute &amp; storage.</i>	<b>Architecture Established</b> - Integration - Data Exchange	<b>Implement Architecture</b> - Tibco Cloud - Load Data to BWP EDW - Purchase Governance Tool	<b>Ongoing Integration Development</b>	<b>Ongoing Integration Development</b>	<b>Ongoing Integration Development</b>
<b>Data Governance Metadata Management</b>	<i>Establish business ownership of critical data. Maximize the business value of the data, i.e. the "return on data assets".</i>	<b>NA</b>	<b>Document Metadata</b> - For Prioritized Use Cases	<b>Implement Data Governance</b>	<b>Initiate Governance Council</b> - Identify Data Steward(s)	<b>Ongoing Data Governance</b>
<b>Data Quality</b>	<i>Data must be "fit for use", i.e. of sufficient quality and completeness, to be used in statistics.</i>	<b>NA</b>	<b>Data Validation Rules</b> - For Prioritized Use Cases	<b>Automate Data Validation Rules</b>	<b>Formalize Data Quality</b> - Publish Data Quality Scores - Improve Data Collection	<b>Ongoing Data Quality Improvement</b>
<b>Data Science Focus Areas</b>	<i>Provide platforms to enable advanced analytics resources who unlock the business value of data.</i>	<b>Electric MDM Analysis</b>	<b>Execute Use Cases Focus Areas:</b> - Customer - Electric TOU - EAM	<b>Execute Use Cases Focus Areas:</b> - Customer, - Electric TOU - EAM, - Water, - Financial	<b>Ongoing Use Case Execution</b>	<b>Ongoing Use Case Execution</b>
<b>Corporate Strategy Alignment</b>  <b>Organizational Literacy</b>	<i>Align &amp; validate corporate goals, improve business processes, and develop a culture that leverages data assets to improve operational performance and organizational learning.</i>	<b>Initiate Formal Data Strategy</b> - Conduct Analytics Survey - Identify Opportunity Areas	<b>Establish Enterprise Analytics</b> - Integrate with Corporate Planning Cycle - Analytics Governance - Map Critical Processes	<b>Formalize Data Management</b> - Tie Data Quality to Data Governance Initiatives - Establish Analytics Center of Excellence (CoE) & Curriculum	<b>Formalize Data Quality</b> - Initiate Process Certification Program - Set organizational goals for data quality	<b>Embed Data Science within Functional Groups</b> - Decentralize Data Science Function - Promote Analytics Self-Service



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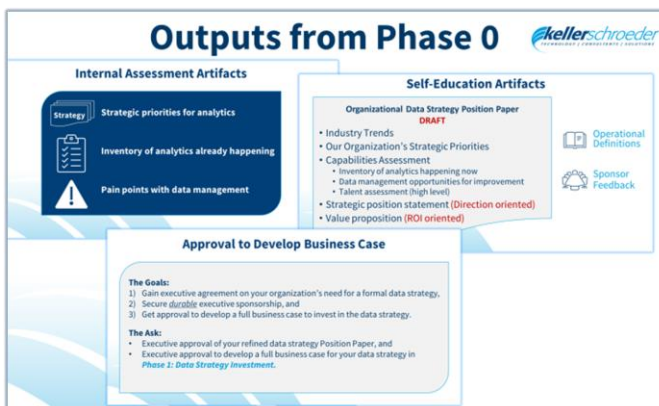
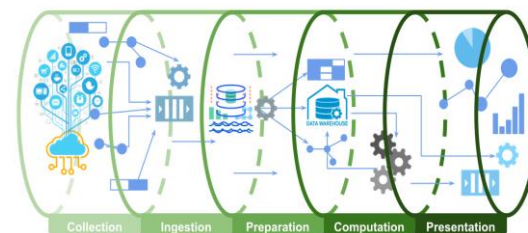
**Culture &  
Sponsors**

# DATA STRATEGY NARRATIVE

**Roadmap  
Aligned to  
Strategy**

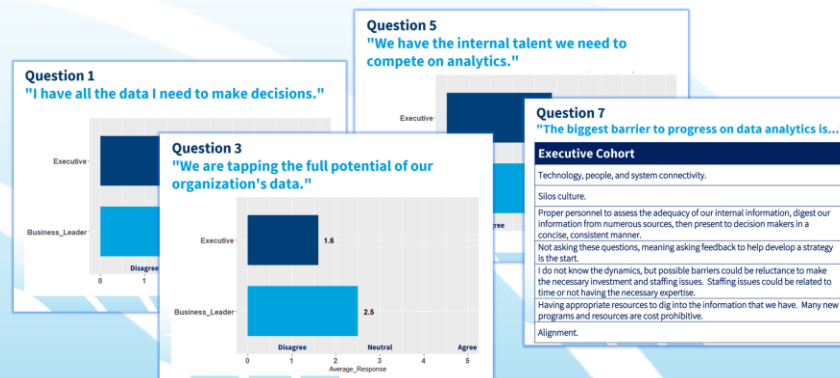
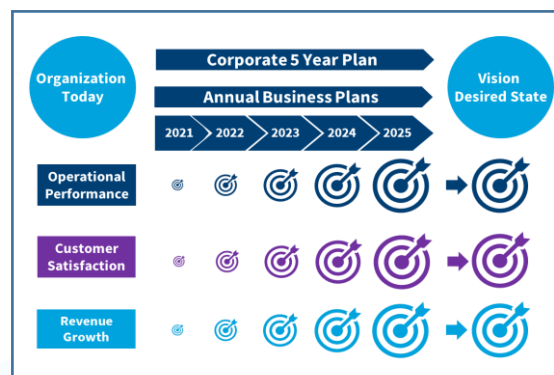
**Current  
State**

**Pilot Project**



**Use Case  
Portfolio**

Data & Analytics 5-Year Plan					
Capability	Purpose	2021 Baseline	2022	2023	2024 - 2026
<b>Use Case Portfolio Management</b>	Accelerate prioritization approach to our portfolio business value from data and analytics projects	Available the Value of Analytics Use Case Portfolio to Executive High Level Business Case (HBC)	Implement the Use Case Portfolio Management Board's Realization Tracking	Manage the Use Case Portfolio (Ongoing Use Case Evaluation Board's Realization Tracking)	Manage the Use Case Portfolio (Ongoing Use Case Evaluation Board's Realization Tracking)
<b>Enterprise Data Warehouse</b>	Bring together collected data from multiple sources, in an organized way, to support organizational reporting	Architecture Established (HBC)	Initial Data Loads - Customer - Lead and B2B - Events Consumption	Normalized Data Loads - Customer - Lead and B2B - Events Consumption	Normalized Data Loads
<b>Technology Architecture</b>	Secure and scalable platform to support analytics. Requirements include integration, data quality, data science, APIs, and enterprise & storage	Architecture Established - Integration - Data Exchange	Implement Architecture - Load Data to BDP (DB - Further Governance Tool)	Deploy Integration Development	Deploy Integration Development
<b>Data Governance Metadata Management</b>	Establish business ownership of critical data. Monitor the business value of the data, i.e. "data as an asset"	NA	Document Metadata - For Portfolio Use Case	Implement Data Governance	Monitor Data Governance
<b>Data Quality</b>	Reduce risk for "No Data" i.e. of sufficient quality and completeness, for the entire portfolio	NA	Data Validation Rules - For Portfolio Use Case	Automate Data Validation Rules	Monitor Data Quality - Implementing
<b>Data Science Focus Areas</b>	Reduce risk for "No Data" i.e. of sufficient quality and completeness, for the entire portfolio	Define HBC Analysis	Execute the Data Science Focus Areas - Customer - Events (HBC) - Data - Model - Predictive	Deploy the Use Case Evaluation	Deploy the Use Case Evaluation
<b>Corporate Strategy Alignment</b>	Align business objectives, goals, support business processes, and enable culture and change management to support organizational performance and organizational learning	Initial Portfolio Data Strategy - Global Analytics Center - Identify Opportunity from	Establish Corporate Analytics - Integrate with Corporate Planning Cycle - Analytics Governance - High Value Proposition	Formalize Data Management - To Data Quality to Data Governance Initiative - Establish Analytics Center of Excellence (CoE) & Culture	Monitor Data Quality - Integrate Portfolio Data Strategy - Formalize Data Governance Function - Promote Analytics Self Service
<b>Organizational Literacy</b>					



# Business Case

## Pro Forma Cash Flows



## Present Business Case



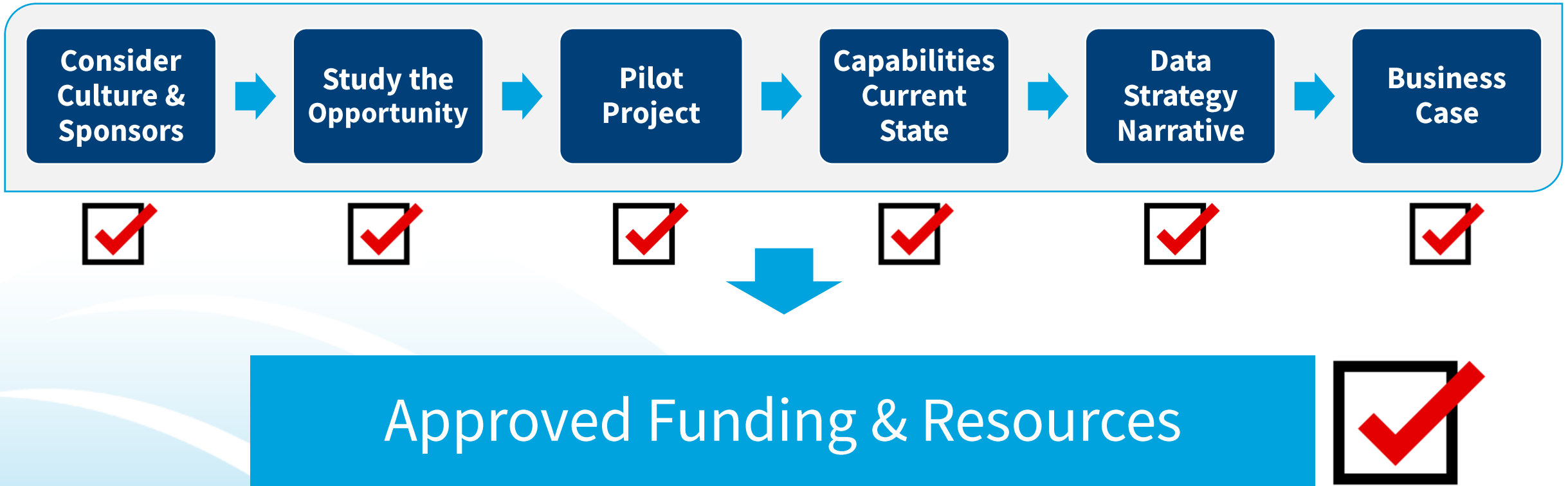
**'The Story'**  
**Self-Funding**  
**Aligned to Strategy**  
**Core Values**  
**Executive Legacy**  
**Digital Age Longevity**

**Staffing**  
**Platforms**  
**Software**  
**Prof. Services**  
**Financial Benefits**  
**Soft Benefits**

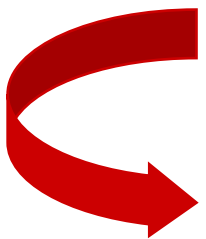
**Know Your Culture**  
**Pre-Meet w/ Sponsors**  
**Plan Participants**  
**Tell 'The Story'**  
**Make the Budget Ask**  
**Objection Handle**









# Data Strategy Phase 1: **INVESTMENT**



# The Keller Schroeder Data Strategy Framework



Phase		Outcome
Explore		Defined Data Strategy
Invest		Business Case
Architect		Implementation Requirements
Procure		Procure Services / Project Setup
Implement		Implementation
Execute		Ongoing Execution

# THANK YOU!

## Questions?

**Josh Pack, PhD**

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