Data Strategy Review

INFO~TECH RESEARCH GROUP

How to use:

Use this template to assess a member's documented data strategy. If the member does not have a documented data strategy, use the blueprint *Build a Robust and Comprehensive Data Strategy* to conduct a guided implementation or other advisory.

This template seeks to provide Info-Tech's analysts a framework to assess a member's data strategy. The grade given to each area is based on the discretion of the Info-Tech analyst. The analyst will also provide recommendations in each area on how to improve the data strategy in its current form.

The analyst will work to grade each area based on Info-Tech's best practice methodology and research. Additionally, the analyst will add their recommendations based on their personal industry experience where applicable.

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Data Strategy Review Service Introduction

Data strategy review importance

The data strategy needs to resonate with both key Business and Data leadership and other stakeholders on the plan for leveraging the strategic value of data. A more robust and comprehensive data strategy does a better job of achieving this goal.

There are a set of components that all successful Data strategies contain. The level of detail that is present for each of those components is an indicator of the level of effectiveness of the data strategy.

Therefore, data strategy effectiveness is predicated on the overall message that the data strategy communicates and individual components that make up the data strategy.

Why is data strategy important

Your data strategy is the vehicle for ensuring data is well poised to support your organization's strategic objectives.

- The dynamic marketplace of today requires organizations to be responsive in order to gain or maintain their competitive edge and place in their industry.
- Disruptive forces often times lead to changes in business models and requires a level of adaptability by organizations in order to remain relevant.
- To respond, organizations need to make decisions and should be able to turn to their data to gain insights for informing their decisions.
- Organizations need to be in a position where they know what's going on with their stakeholders and pre-empt what's going to be their stakeholders' needs.

A **well formulated** and **robust data strategy** will ensure that your data investments, **bring you the returns** by meeting your organization's strategic objectives.

Value of the Data Strategy Review Service

Our service will ensure your data strategy aligns with industry best practices and is right-sized for your organization

"Your data strategy will be ratified by independent and unbiased eyes"

- Andy Neill, Senior Director at Info-Tech

Value of Info-Tech's Data Strategy methodology

Data strategies refined and created using Info-Tech's best practice methodology have generated significant monetary value and business satisfaction improvement.

Average Dollar Impact*

<< Update >>

Average Days Saved

<< Update >>

Overall Business Satisfaction Improvement

<< Update >>

*Only includes value experienced from Info-Tech's workshop. Does not include additional monetary impact (e.g. budget increases, Data initiative approvals).

Data strategy review key deliverables

The data strategy review produces a document outlining the data strategy effectiveness level along with recommendations on how to improve relevant areas.

This is an assessment of the strategic Data plan as a whole.. This assessment is focused on evaluating the data strategy document holistically against different criteria.

This assessment evaluates each section of the data strategy (e.g. Target state) and its sub-sections (e.g. Data Goals). The assessment examines whether each sub-section met the level of detail necessary to produce an effective data strategy.

A final score to data strategy maturity is given based on the on the scores of the criteria in both the overall assessment and the sectional assessment.

Client testimonial and success story

INDUSTRY

<< >>

Info-Tech conducted a data strategy workshop for a world leader in global, mobile satellite communications that provides governments, commercial enterprises and humanitarian organizations with mission-critical voice and high-speed data communications on land, at sea and in the air.

Situation

- <<<< Update with info from the Inmarsat workshop around the current situation as it relates to data and hence what lead to the need/the drivers for the data strategy (and the workshop) >>
- Info-Tech's analyst were brought on to create a data strategy using Info-Tech's methodology.

Action

- Analysts assisted the Data and Business leadership at the organization by first interviewing business executives and key stakeholders and understanding their needs.
- Using the business context, Info-Tech's analysts helped the team understand the desired target state for data.
- The analysts reviewed survey information that identified to the team, areas in the current state that required improvement.
- Further, the analysts identified gaps between the current and target state. The analysts then created a roadmap to reach the target state.

Results

- The data strategy was well received by business executives, and data team delivered against the roadmap successfully.
- This resulted in:
- Additionally, the role of the CDO was formalized …….. Data Steering committee/ working group, etc.

Data Strategy Review project metrics

Use the following metrics to assess the data strategy review service's success and impact:

Criteria	Metrics
Overall Assessment	- **Business Context Orientation:** Did the assessment help identify missing pieces of the business context for the data strategy? How many pieces were identified? - **Budget Considerations:** Did the assessment generate methods and/or direction on how to better position your budget in the data strategy? How many recommendations were generated? - **Initiative Details:** Were there any conclusions drawn from the assessment results to assist you with better presenting your Data initiatives and its details? How many details can now be changed? - **Insights Generated:** Did the review help you re-orient the data strategy to present insights differently? How many different insights can now be presented? - **Visual Appeal:** How many recommendations were generated to help you improve the visual appeal of your data strategy? - **Logical Flow:** How many locations were identified where the logical flow was faulty?
Sectional Assessment	- **General Sectional Assessment:** Did the assessment help you identify the sections (i.e. Target State) that required improvements? - **Specific Sectional Assessment:** How many specific sections did the assessment assist you with identifying that were missing?

Data Strategy Effectiveness Assessment

Data strategy effectiveness importance

The data strategy needs to resonate with both key Business and Data stakeholders on the plan for leveraging the strategic value of data. A more mature, robust and comprehensive data strategy does a better job of achieving this goal.

Business Stakeholders

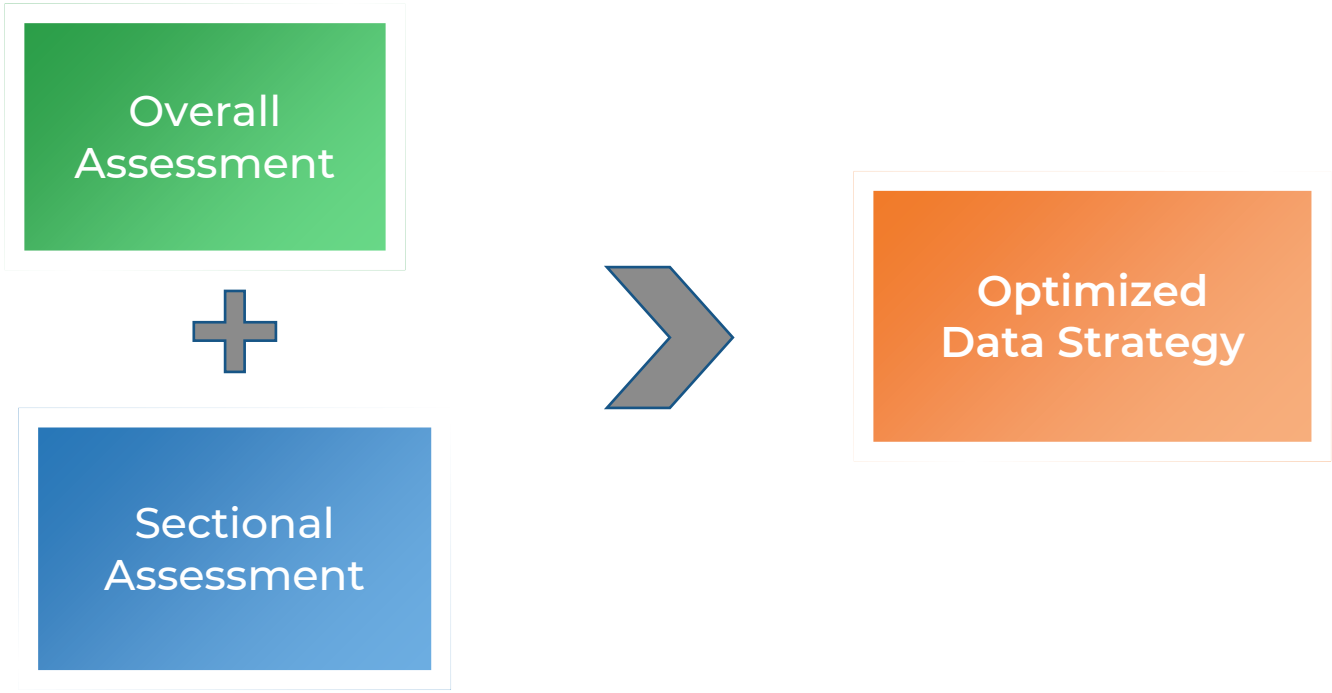
Convince business stakeholders of how the data strategy supports and aligns with the organization's strategic direction and priorities. Gain senior leadership support, buy-n and approval for additional funding and resources

IT Department

Convince Data of the importance of the data strategy. Communicate to IT, the key partnership role they play in the data strategy.

Data strategy optimization overview

The data strategy effectiveness is a function of an overall assessment and a sectional assessment.



Data strategy effectiveness assessment components

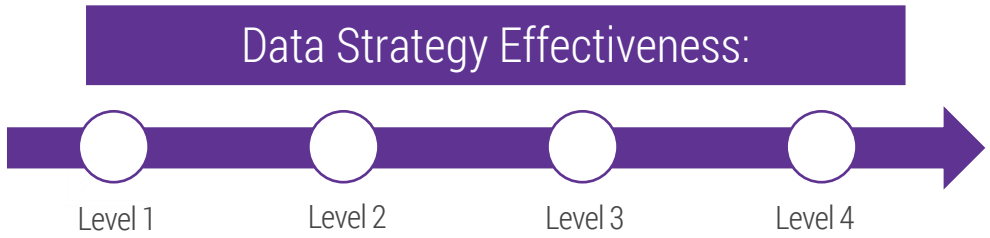
Overall Assessment

This is an assessment of the data strategy as a whole. This assessment is focused on evaluating the data strategy document holistically against different criteria.

Sectional Assessment

This assessment evaluates each section of the data strategy and its sub-sections. The assessment examines whether each sub-section met the level of detail necessary to produce an effective data strategy.

Data strategy maturity results



Overall Assessment:	1
Business Orientation:	1
Budget Considerations:	1
Initiative Detail:	1
Insights Generated:	1
Visual Appeal:	1
Logical Flow:	1

Sectional Assessment:	1
Business Context Assessment:	1
Data Strategy Goals and Vision Assessment	1
Target State Assessment:	1
Current State Assessment:	1
Gap Analysis and Roadmap Planning:	1
Risk and Feasibility Analysis	1

Level 1

- Both the overall assessment and the sectional assessment produced an average of level 1.
- Many components of what make up an effective data strategy are non-existent.

Level 2

- Both the overall assessment and the sectional assessment produced an average of level 2.
- Some components of what make up an effective data strategy are missing.
- Most existing components require rework to improve their quality.

Level 3

- Both the overall assessment and the sectional assessment produced an average of level 3.
- Few if not all components that make up a data strategy are present.
- Some existing components require rework to improve their quality.

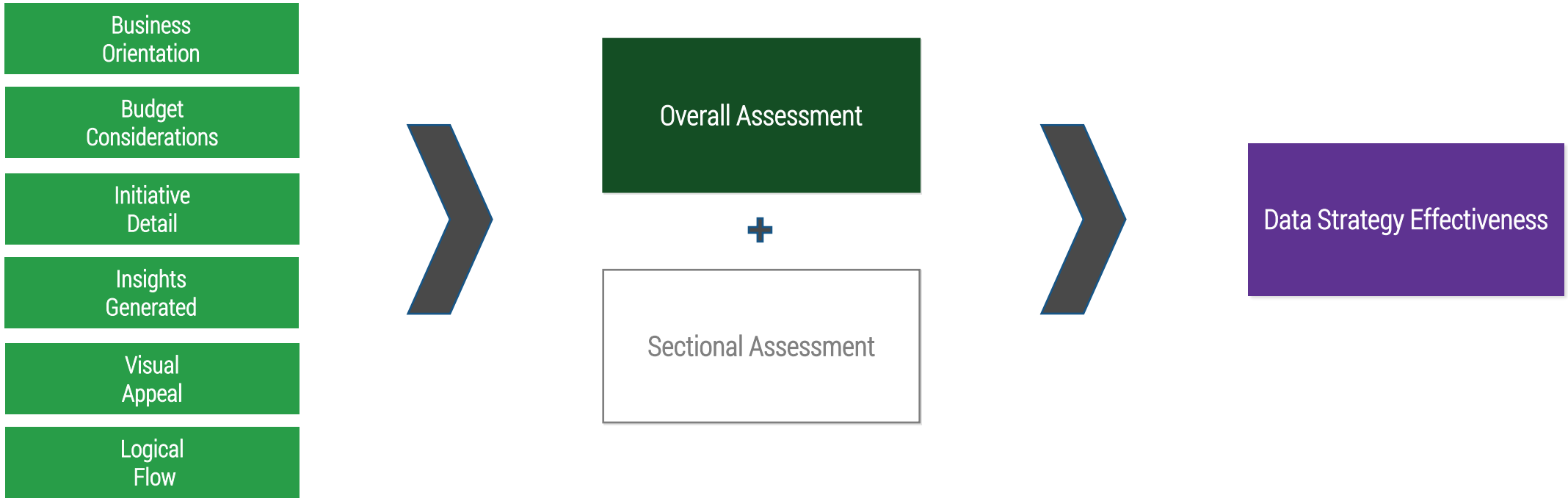
Level 4

- Both the overall assessment and the sectional assessment produced an average of level 4.
- Few if not all components that make up a data strategy are present.
- A significant majority of existing components are of high quality and maturity.

Overall Assessment

Data strategy overall assessment overview

The overall assessment is made up of six criteria.



Data strategy overall assessment criteria

Assessment Criteria	Details
Business Orientation	Assesses the level of at which the data strategy demonstrates its support of the business context.
Budget Considerations	Evaluates whether budget considerations are articulated including clarity on the sponsoring department (e.g.: CDO, Finance) and its situation.
Initiative Details	Determines the key initiatives outlined in the strategy and whether there are compelling arguments made for the execution of current and future key initiatives.
Logical Flow	Evaluates the strategy in terms of the data story it tells and if readers can understand how the pieces work together for making an overall compelling case.
Visual Appeal	Assesses whether the strategy is visually appealing enough to engage stakeholders to follow along.
Insights Generated	Determines if the data strategy generates any “a-ha” moments for readers and if the strategy generates any key takeaways not previously known by business or Data executives.

Business orientation assessment results

This slide shows the business orientation assessment score

Level 1

- The data strategy was developed absent of the business context.
- No business context documentation or stakeholder interviews were used to inform the development of the data strategy.

Level 2

- Some level of business context discovery was conducted prior to data strategy development.
- The business context is documented as part of the data strategy.
- It is not clear how the Data target state is derived from the business context.
- No linkage is shown between how Data supports the business context.

Level 3

- Business context discovery was conducted prior to data strategy development.
- The business context is not only documented as part of the data strategy, Data is clear that the Data target state is derived from the business context.
- Linkage is shown as to how Data initiatives and goals support the business context.

Level 4

- The linkage between how Data will support the business is very clear.
- Readers can easily point to how Data initiatives can support business goals and/or capabilities.
- Clear depiction of how the Data target state is derived from the business context is present.

Budget considerations results

This slide shows the budget considerations assessment score

Level 1

- There is no budget considerations presented in the data strategy.

Level 2

- There is a high level current and required future budget present.
- Many initiatives are missing the status of their budgets.
- The budget is only projected out for the next fiscal year.

Level 3

- There is a high level current and required future budget present.
- A significant majority of the data initiatives have information around their budgets.
- There is a high level "ask" and/or summary present in the budget section.

Level 4

- The budget is clearly defined for both future and current data initiatives.
- Budgeting status and gaps are assigned for each data initiative.
- The budget is projected out for the entire time horizon of the data strategy.
- The sponsoring department is explicitly mentioned
- The budget is presented in a way that presents clear decision-making points for stakeholders.

Initiative details results

This slide shows the initiative details assessment score

Level 1

- There is a list of Data current and future Data initiatives that will be executed.

Level 2

- There is a list of current and future Data initiatives.
- In addition to the list, there is is at least one additional element listed for the initiatives (e.g. start-end date, accountability, budget, etc.).

Level 3

- There is a list of current and future Data initiatives.
- There is distinction between key Data initiatives and non-key Data initiatives.
- Accountability, execution schedule, and budget status are all present for each Data initiative.

Level 4

- There is a list of current and future Data initiatives.
- There is distinction between key Data initiatives and non-key Data initiatives.
- Accountability, execution schedule, and budget status are all present for each Data initiative.
- Furthermore, alignment of key Data initiatives to Data and business goals are present.
- Additionally, for key Data initiatives, business benefits, dependencies, and risks are summarized.

Insights generated results

This slide shows the insights generated assessment score

Level 1

- Data strategy process was not conducive to insight generation.
- Further, no insights were generated as part of data strategy development.

Level 2

- There is at least one piece of insight generated as part of the strategy.
- The insight changes the way Data and business stakeholders perceive a certain aspect of the Data department.
- The insights are documented in the strategy.

Level 3

- There are at least two insights generated as a result of developing the data strategy.
- The insights are actionable and in the judgment of the data strategy development team provide significant value.
- The insights are documented in the strategy.

Level 4

- There are more than two insights that are generated as part of the data strategy development process.
- The insights are actionable and in the judgement of the data strategy development team provide significant value.
- The insights are documented and can be presented to stakeholders.

Visual appeal assessment results

This slide shows the visual appeal assessment score

Level 1

- The data strategy is visually unflattering. Data consists of only paragraphs of text.

Level 2

- The strategy requires the viewer to read text for a significant portion of the strategy.
- Visuals exists for key messages only.

Level 3

- The majority of the components in the data strategy consists of visual diagrams.
- Paragraphs of text exist to solely compliment the visual information.

Level 4

- The data strategy provides strong visualizations of how Data supports the business and what Data aims to do in the strategy.
- Visuals clearly consolidate text information.
- Roadmaps, diagrams, graphs, make up a vast majority of the strategy.
- Standalone paragraphs of text are far and few in between.

Logical flow assessment results

This slide shows the logical flow assessment score

Level 1

- The data strategy documentation is difficult to understand from narrative perspective.
- There is no linkage between one section to the next.

Level 2

- The data strategy components flow smoothly only for small portions of the strategy.
- There are significant lengths of the strategy that are confusing for readers.

Level 3

- The data strategy components flow smoothly for large portions.
- There are a few sections that are confusing for readers.

Level 4

- The data strategy components flow very smoothly.
- Readers can easily understand how one section leads to the next.
- The data strategy tells a clear story of how Data supports the organization.

Overall assessment results

This slide shows the overall assessment score

Level 1

- On average the holistic assessment scores are at level 1.
- Evidence of business context orientation, visual are non-existent.
- Information around budget, initiatives, and insights are sparse.
- Logical flow is extremely poor.

Level 2

- On average the holistic assessment scores are at level 2.
- Business context orientation is not clear, some visuals are present.
- Logical flow is only demonstrated in sections.
- Budget and initiatives include more details.
- There is one insight in the strategy.

Level 3

- On average the holistic assessment scores are at level 3.
- Business context orientation is clear, visuals are present in most of the strategy.
- Logical flow is demonstrated in large portions.
- Budget and initiatives include more granular levels of detail.
- There are two actionable insights that are in the strategy.

Level 4

- On average the holistic assessment scores are at level 4.
- Business context orientation is very clear.
- Visuals are present throughout the strategy.
- Logical flow is clear to readers.
- Budget and initiatives meet the highest standards of documentation.
- There are more than two insights in the strategy. The insights are clearly presented to readers.

Overall assessment recommendations

This slide recommends different ways to increase the data strategy maturity

Recommendations:

- <Input comments and recommendations to improve any sections of the overall assessment here.>

Sectional Assessment

Sectional assessment overview

The sectional assesses each section of the data strategy. The evaluation consists of how far each section of the data strategy is from best practices.

Gaps and Omissions

Based on an assessment from Info-Tech's analysts.

This section determines what is missing from the listed best practices for each section.

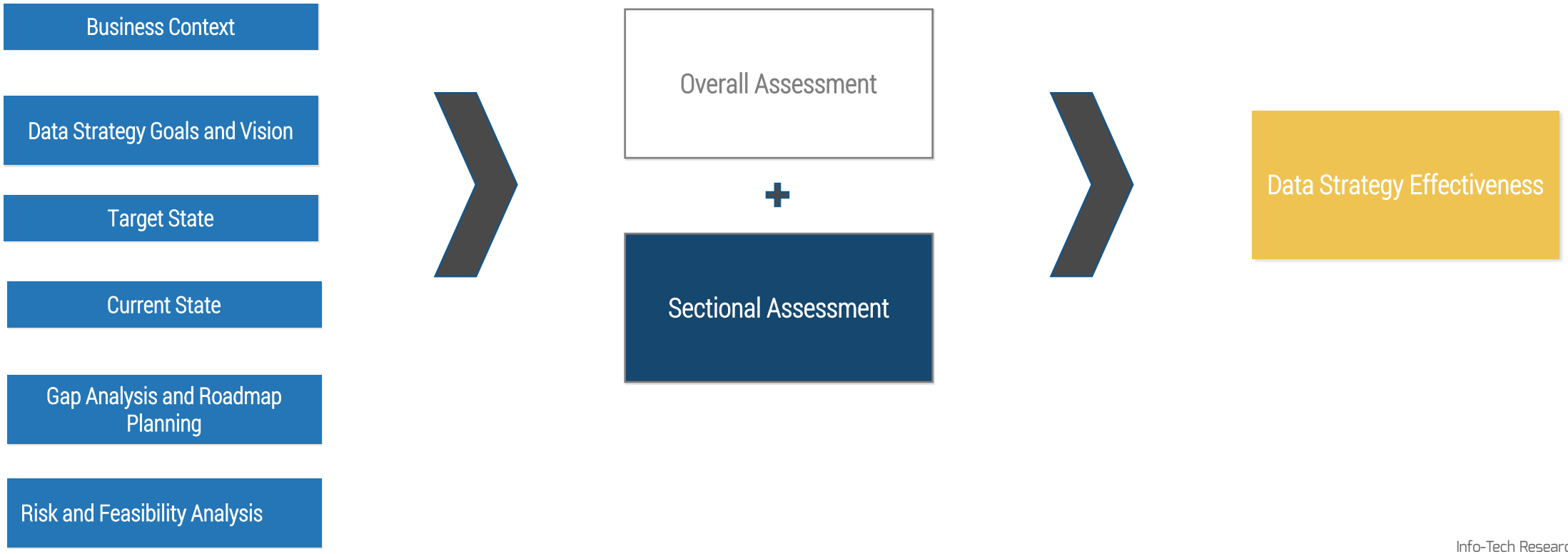
Recommendations

Provided by Info-Tech's analyst based on analysis of your strategy.

This section provides information on what needs to be addressed from gaps and omission to reach the best practice state.

Data strategy maturity sectional assessment

Data strategy maturity is a function of the overall assessment and sectional assessment



Data strategy sectional assessment criteria

Assessment Criteria	Details
Business Context	Assesses the business context section of the data strategy. Determines if the ideal level of business context information has been provided to inform and create an effective data strategy.
Data Strategy Goals and Vision	Examines whether the data strategy objectives, outcomes, guiding principles, and vision have been clearly articulated for ensuring a robust strategy is formulated
Target State	Evaluates the target state section of the data strategy. Determines if the details provided for the target state depicts a clear picture of what the future state of Data, looks like at the organization.
Current State	Assesses the current state section of the data strategy. Evaluates whether a thorough enough analysis has been done on the current environment across key areas including data management capabilities, people and culture.
Gaps and Roadmap	Evaluates the gaps and roadmap section of the data strategy. Assesses if gaps are being addresses and if the next steps for the data strategy is clear.
Risk and Feasibility Analysis	Assesses the risk and feasibility section of the data strategy. Evaluates whether a risk analysis has been conducted to determine possible risks along with measures to mitigate the risks identified. There is clear documentation of not only barriers but also enablers to the sustainable success of the data strategy

Business context assessment results

This slide shows the business context assessment score

Level 1

A vast majority of the listed components do not exist in the data strategy documentation.

Level 2

A majority of the listed component exist. But a significant portion do not follow the "best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.

Level 3

A majority of the listed components exist. But some do not follow the "best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.

Level 4

Every component outlined in the section is present. Further, these sections follow the "best practice" outlined by Info-Tech to explicitly communicate the business context, value and scope for the data strategy.

Data strategy goals and vision assessment results

This slide shows the data strategy goals and vision assessment score

Level 1	Level 2	Level 3	Level 4
A vast majority of the listed components do not exist in the data strategy documentation.	A majority of the listed component exist. But a significant portion do not follow the “best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.	A majority of the listed components exist. But some do not follow the “best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.	Every component outlined in the section is present. Further, these sections follow the “best practice" outlined by Info-Tech.

Target state assessment results

This slide shows the target state assessment score

Level 1

A vast majority of the listed components do not exist in the data strategy documentation.

Level 2

A majority of the listed component exist. But a significant portion do not follow the “best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.

Level 3

A majority of the listed components exist. But some do not follow the “best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.

Level 4

Every component outlined in the section is present. Further, these sections follow the “best practice" outlined by Info-Tech which includes a maturity assessment of key data management enablers as well as diagnostic on people and culture..

Current state assessment results

This slide shows the current state assessment score

Level 1

A vast majority of the listed components do not exist in the data strategy documentation.

Level 2

A majority of the listed component exist. But a significant portion do not follow the “best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.

Level 3

A majority of the listed components exist. But some do not follow the “best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.

Level 4

Every component outlined in the section is present. Further, these sections follow the “best practice" outlined by Info-Tech which includes a maturity assessment of key data management enablers as well as diagnostic on people and culture..

Gap analysis and roadmap assessment results

This slide shows the gaps and roadmap assessment score

Level 1	Level 2	Level 3	Level 4
A vast majority of the listed components do not exist in the data strategy documentation.	A majority of the listed component exist. But a significant portion do not follow the “best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.	A majority of the listed components exist. But some do not follow the “best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.	Every component outlined in the section is present. Further, these sections follow the “best practice" outlined by Info-Tech which includes a maturity assessment of key data management enablers as well as diagnostic on people and culture..

Risk and feasibility analysis assessment results

This slide shows the risk and feasibility analysis assessment score

Level 1

A vast majority of the listed components do not exist in the data strategy documentation.

Level 2

A majority of the listed component exist. But a significant portion do not follow the "best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.

Level 3

A majority of the listed components exist. But some do not follow the "best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.

Level 4

Every component outlined in the section is present. Further, these sections follow the "best practice" outlined by Info-Tech.

Sectional assessment results

This slide shows the sectional assessment score

Level 1

A vast majority of the listed sections do not exist in the data strategy documentation.

Level 2

A majority of the listed sections of the data strategy exists. But a significant portion do not follow the “best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.

Level 3

A majority of the listed sections of the data strategy exists. But some do not follow the “best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.

Level 4

A vast majority of the listed sections of a data strategy outlined by Info-Tech exists. Further, these sections follow the “best practice" outlined by Info-Tech.

Sectional assessment recommendations

This slide recommends different ways to improve the data strategy's level of effectiveness.

Recommendations:

- <Input recommendations to improve any sections of the sectional assessment here.>

Sectional Assessment: Business Context

Business context for the data strategy

Business context, value, and scope of the data strategy: An effective data strategy is one that aligns with the strategic direction of the organization.

Key components that make up the business context:

- Organization (and industry) background
- Company strategy, goals, and objectives, vision and mission
- Organizational Drivers
- Why do we need a data strategy
- Scope
- Challenges
- Use Cases: Business-driven data value creation opportunities

Company strategy, goals and objectives assessment

Gaps and Omissions

Company strategy, goals, and objectives
Business-driven data value creation opportunities

Recommendations:

Business Goal to Business Initiative

- ❑ For each business goal there are at least two business capabilities/business initiatives that are defined to support the business goal.

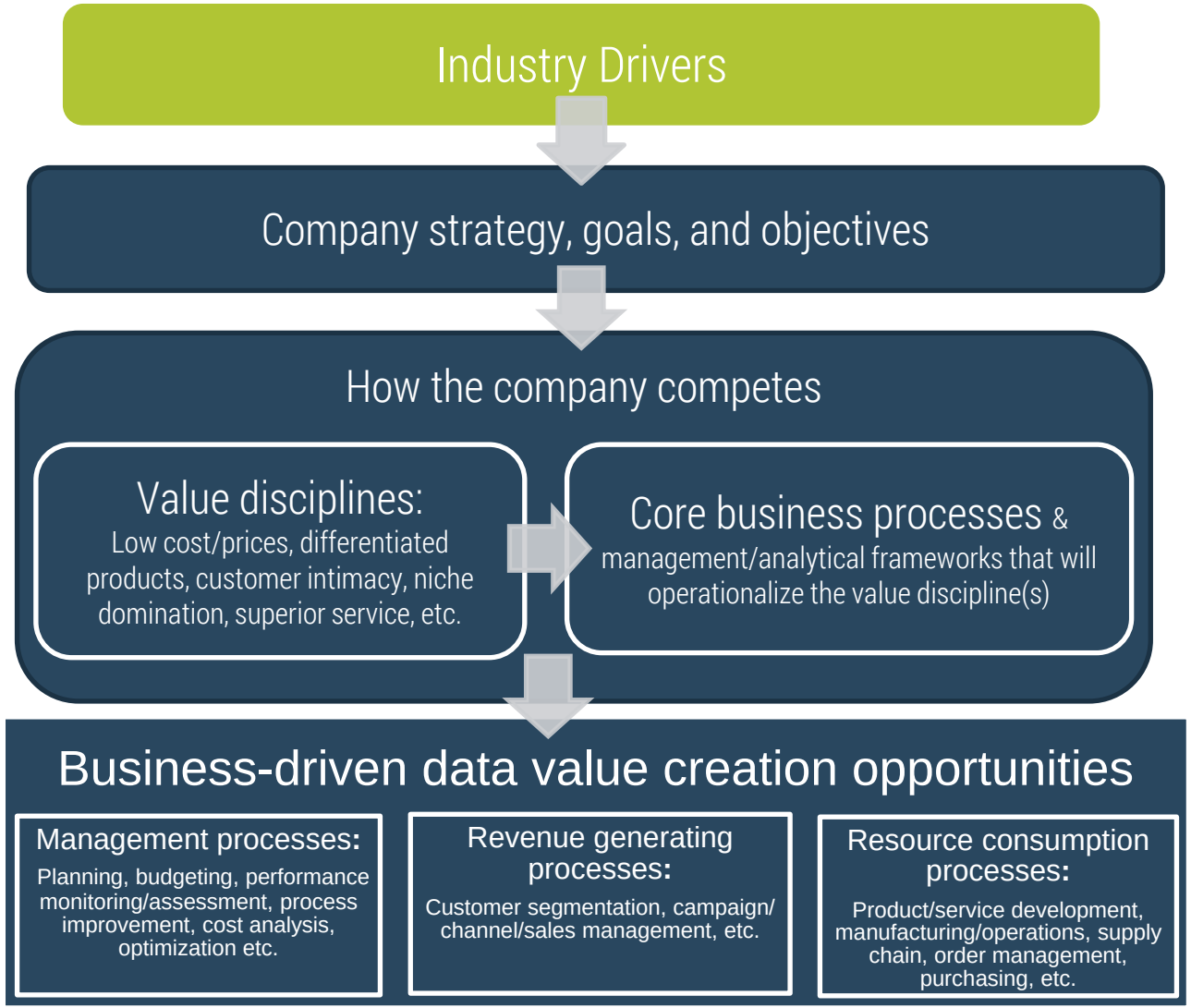
Business Goal Details

- ❑ Each business goal has accompanying "sub-goals" or details that describe key actions and milestones of the goal.

Business Goals

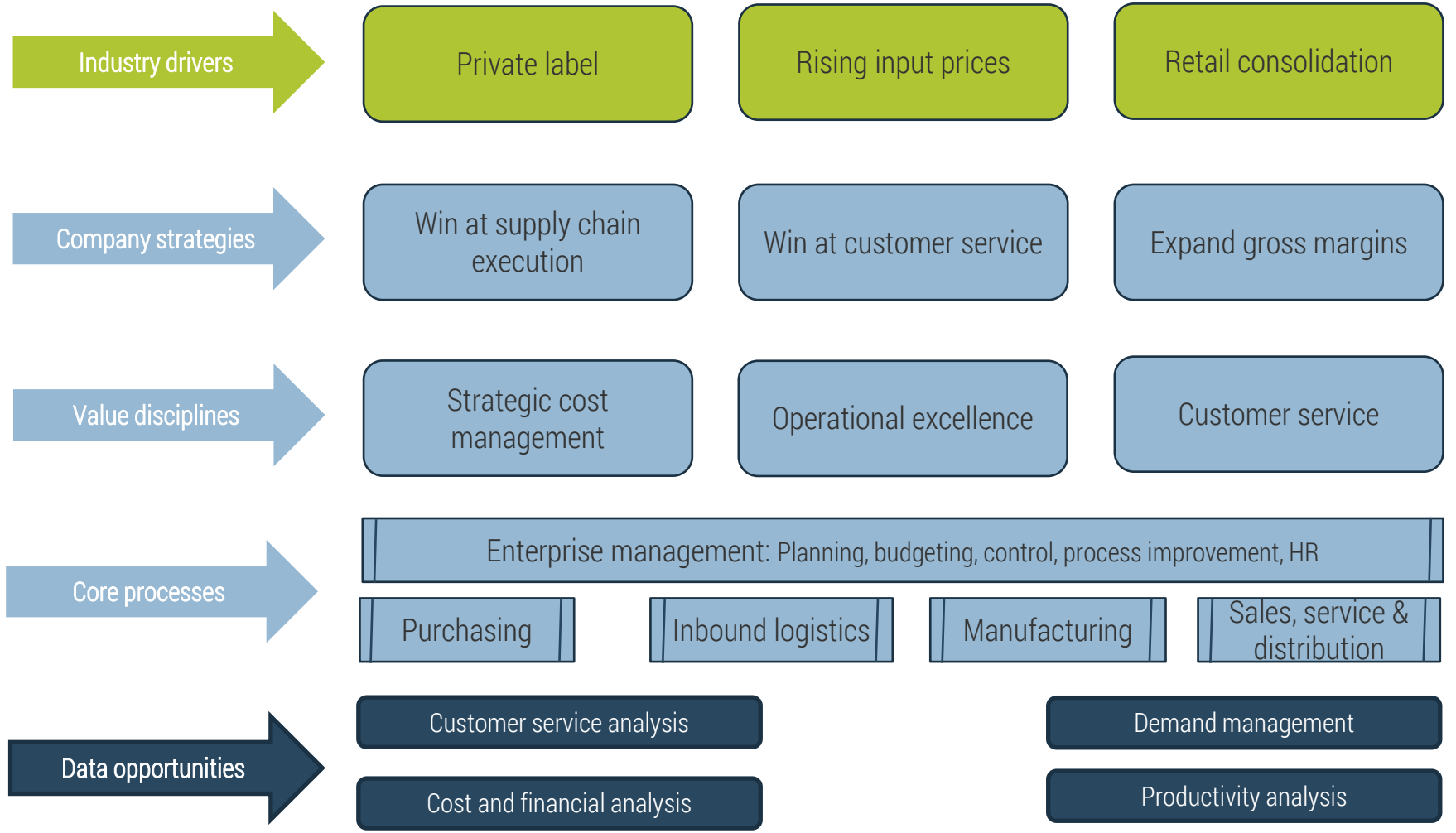
- ❑ Organization (and industry) background is included
- ❑ There is a list of business goals and objectives present in the data strategy.
- ❑ The business goals are derived from corporate documents OR the business goals were discovered through communication/interviews with senior leadership and other stakeholders.

Formulating a **data strategy:** Data opportunity analysis



Source: Williams, *Business Intelligence Strategy and Big Data Analytics,* 2016.

Example:
Retail organization: Data opportunities



Source: Williams, *Business Intelligence Strategy and Big Data Analytics*, 2016.

Data strategy optimization should be driven by business goals

Data is an enabler of the business. Data strategy optimization therefore needs to be **driven by business goals and objectives**.

Common Business Drivers

1. Stakeholder Experience / Service Excellence
2. Product and Service Innovations
3. Operational Excellence and Efficiency
4. Risk and Compliance Management

Deconstructing common business drivers

In the face of **continuously changing business models**, organizations of today are looking at their data as a **source of competitive advantage.**

1 Stakeholder Experience / Service Excellence

As an organization, your current focus is on improving your stakeholder experience and striving for service excellence whether by offering highly tailored products or services, upselling, cross-selling, targeted communication, building customer loyalty levels.

For every organization, stakeholders are going to be different.

For instance in **retail**, some of the key stakeholders are: customers, suppliers, partners, employees.

In **healthcare**, key stakeholders include: patients, physicians, nurses, staff, suppliers, pharmaceutical firms, insurance providers, and the government.

In **education**, Students, faculty, staff, researchers, the community, boards,

In **Government:** residents, citizens, the community, unions, governing bodies

Deconstructing common business drivers

In the face of **continuously changing business models**, organizations of today are looking at their data as a **source of competitive advantage.**

2 Product and Service Innovations

In order to maintain or establish your competitive edge your organization is looking to become innovative in the product(s) and service(s) that you offer.

As an organization, you're seeking to **differentiate through product or service innovation** which sees you inventing and adapting to keep pace and/or get ahead of changing customer and stakeholder preferences by understanding purchasing habits, consumption, behaviors, more varied and larger data sets, IoT and other disruptive forces.

Deconstructing common business drivers

In the face of **continuously changing business models**, organizations of today are looking at their data as a **source of competitive advantage.**

3 Operational Excellence and Efficiency

As an organization you're focused on optimizing your **operational excellence and efficiency** for ensuring you are delivering high quality products or services in a most cost-effective manner.

This may mean your focus is on optimizing your ordering, production and fulfillment processes or you're working on the efficiency of your operations, making them more lean, reducing waste and optimizing resource utilization all of which can contribute to lower costs and higher profit margins.

Deconstructing common business drivers

In the face of **continuously changing business models**, organizations of today are looking at their data as a **source of competitive advantage.**

4 Risk and Compliance Management

As an organization, you're operating in a highly regulated industry or you may be a government entity (federal, state, provincial, municipal) and you are mandated to meet certain regulatory requirements. Your data strategy optimization may therefore be in response to changes in the existing regulatory/compliance landscape.

Risk mitigation is also another driver for formalizing or optimizing a data strategy - your current practices and environment may be outdated, leading to potential exposure to risk.

Begin your data strategy planning by first ensuring you have a deep understanding of the business

Develop a deep understanding of the business, its goals, and its plans.
This understanding will ensure that the data strategy planning and the resulting outcomes around data, directly align with business needs and value and are in support of key strategic priorities.

Key Items to Consider

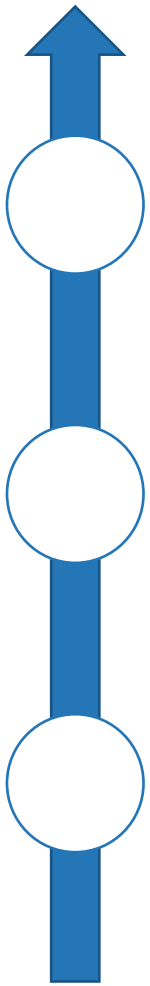
What are the driving forces behind changes and decisions within the business?

1. Stakeholder Experience / Service Excellence
2. Product and Service Innovations
3. Operational Excellence and Efficiency
4. Risk and Compliance Management

Questions for your business stakeholders:

1. Is the organization's business model changing? (are we an organization that grows by acquisitions, are we expanding operations in to a new jurisdiction?
2. Are business operations evolving and changing?
3. Are regulations causing the organization to re-evaluate how data is used and managed by the business?

Use cases: Business-driven data value creation opportunities



Gaps and Omissions

Company strategy, goals, and objectives
Business-driven data value creation opportunities

Business Goal to Business Initiative

- ❑ For each business goal there are at least two business capabilities/business initiatives that are defined to support the business goal.

Business Goal Details

- ❑ Each business goal has accompanying "sub-goals" or details that describe key actions and milestones of the goal.

Business Goals

- ❑ Organization (and industry) background is included
- ❑ There is a list of business goals and objectives present in the data strategy.
- ❑ The business goals are derived from corporate documents OR the business goals were discovered through communication/interviews with senior leadership and other stakeholders.

Recommendations:

Info-Tech's framework on developing use cases for the data strategy

Objective: Business needs gathering activity to highlight and create relevant use cases around data-related problems or opportunities that are clear, contained, and which if addressed, will deliver value to the organization.

Info-Tech's Data Requirements and Mapping Methodology for Creating Use Cases

Breakout Session #1

1. What is a number 1 risk you need to alleviate?
2. What is a number 1 opportunity you wish to see happen?
3. What is a number 1 pain you have when working with data?

Once you identify a data-related business activity/process, define a Problem Statement

Breakout Session #2

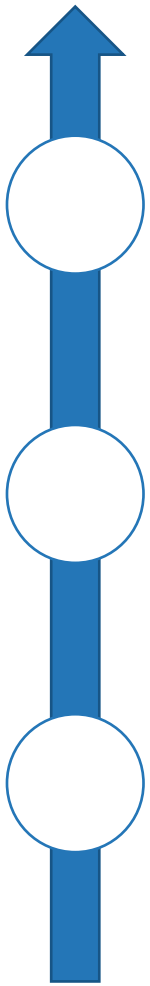
4. What are your challenges in performing the activity today?
5. What does amazing look like if we solve this perfectly?
6. What other business unit activities / processes will be impacted / improved if we solve this?
7. What compliance/regulatory/policy concerns do we need to consider in any solution?
8. What measures of success/change should we use to prove value of the effort (KPIs/ROI)?

Breakout #3

9. What are the steps in the process/activity today?
10. What are the applications/systems used at each step and from step to step?
11. What data elements (domains) are involved, created, used, or transformed at each step?

The resulting use cases are to be prioritized and leveraged for informing the business case for the data strategy

Organization vision and mission assessment



Gaps and Omissions

Connection to Data Strategy

- The data strategy development team can clearly articulate how the data strategy supports the organization's vision and mission statement.

Statement Message

- The data strategy development team can clearly articulate the message of the organization's vision and mission.

Vision and Mission Statements

- The organization's vision and mission statements are both present in the data strategy.

Recommendations:

Organization vision and mission example

Vision

Become a respected leader and partner in <industry>, improve our customer's quality of life.

Mission

Provide safe, reliable, and environmentally responsible products and services.

Source: XXXX

Sectional Assessment: Data Strategy Goals and Vision

Data strategy vision and mission statements assessment

Gaps and Omissions:

Connection to Organization

The statements follow these characteristics:

- ❑ Vision statement: Describes a desired future. Focuses on ends, not means. Aspirational. Memorable. Concise.
- ❑ Mission Statement: Articulates purpose. Describes how to achieve the vision. Easy to grasp. Sharply focused.

- ❑ The data team can clearly articulate how the statements support the organization.
- ❑ The wording in the statements is succinct. The wording conveys the exact meaning of the statements.

IT Vision and Mission Statement

- ❑ There is a Data vision statement and Data mission statement present in the data strategy.
- ❑ Vision and mission statements reflect the key characteristics outlined for effective statements.

Recommendations:

- Refer to

Create compelling vision and mission statements for the organization's data strategy

A vision represents the way your organization intends to be in the future.

A clear vision statement helps align the entire organization to the same end goal.

Your vision should be brief, concise, and inspirational; it is attempting to say a lot in a few words so be very thoughtful and careful with the words you choose. Consider your IT department's strengths, the customers of your IT services, and your current/future commitments to service quality.

Remember that a vision statement is internally facing for other members of your company throughout the process.

A mission expresses why you exist.

While your vision is a declaration of where your organization aspires to be in the future, **your mission statement should communicate the fundamental purpose of the data management practice.**

It identifies the function of IT, what it produces, and its high-level goals that are linked to delivering timely, high quality, relevant, and valuable data to business processes and end users. Consider if the practice is responsible for providing data for **analytical** and/or **operational** use cases.

A mission statement should be concise, and provide a clear statement of purpose for both internal and external stakeholders.

> *A vision is a picture of the future you seek to create, described in the present tense, as if it were happening. A statement of our vision shows where we want to go and what we will be like when we get there.*
>
> – Senge et al. 1994

> *The mission statement provides a valuable starting point for establishing, afterwards, more specific objectives and strategies.*
>
> – Hannagan, 2002

Data strategy guiding principles assessment

Gaps and Omissions:

Characteristics and Additional Context

The Data principles meet the characteristic that will make them adhered to and relevant.

- ❑ Organization specific
- ❑ Long lasting
- ❑ Prescriptive
- ❑ Verifiable (compliance to principles can be verified)
- ❑ Easily digestible
- ❑ Followed and emphasized in the organization

- ❑ Each principle has a rationale section; the business benefits and reasoning for establishing the principle is documented.
- ❑ For each principle, the implications of when the principle is to be applied is also listed. More than one situation of when the principle is to be applied is listed.

IT Vision and Mission Statement

- ❑ There are at least 3 data strategy guiding principles present.
- ❑ For each Data guiding principle, the principle is named and the details of the principle is explained.

Recommendations:

- Refer to section 1.4 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.
- Refer to the "IT Vision Mission and Guiding Principles Guide" to assist you to complete.

Guiding principles for your organization's data strategy

The Value of Clearly Defined Data Principles

- Guiding principles help define the culture and characteristics of your practice by describing your beliefs and philosophy.
- Guiding principles act as the heart of your data management – helping to shape initiative plans and day-to-day behaviors related to data management and treatment of the organization's data assets.
- Examples:

Principle #1
The organization's data supports fact-based decision making

Principle #2
Data is comprehensively integrated data

Principle #3
Data is appropriately accessible and available to support timely consumption and insight generation

Principle #4
Quality of data will be measured, maintained and managed

Principle #5
Data definitions are consistent and are maintained and managed to support data users

Principle #6
Data owners and data stewards are accountable and responsible for their domains

Principle #7
Data is managed (curated, retained, archived, disposed) across its lifecycle

Principle #8
Data is appropriately secured across its lifecycle

Principle #9
Data is governed

Info-Tech **Insight**

Take the time to craft your Guiding Principles. They are shared long-lasting beliefs that will guide your treatment, investment and decisions as it relates to your data and data management. Devise a set of guiding principles that speak to your organization's data strategy and your current or desired culture.

Data strategy goals assessment

Gaps and Omissions:

IT Goal Development

- ❑ Each Data goal can be traced back to Data implications developed from the business context.

IT Goal Clarity

- ❑ Each data strategy goal has a name and a corresponding statement explaining the details of the goal.
- ❑ The data strategy goal name and explanation is easily understandable by all audiences.

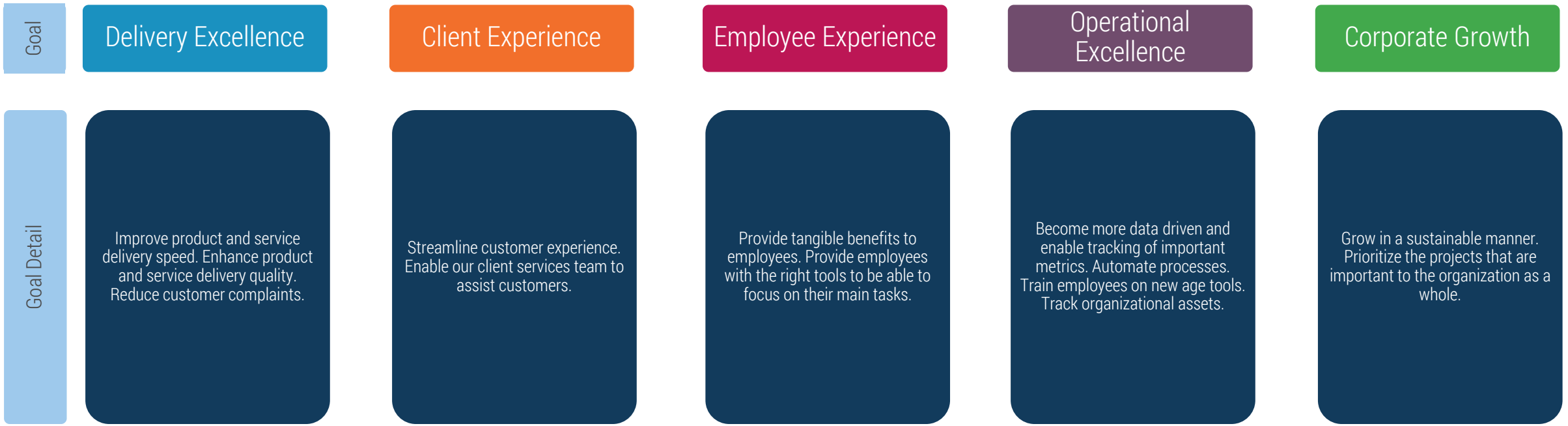
IT Goals

- ❑ There are 3 to 7 data strategy goals present in the data strategy.

Recommendations:

- Refer to section 1.5 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Data strategy goals example



Sectional Assessment: Target State

Data strategy scope assessment

Gaps and Omissions:

Scope Clarity

- ❑ Each section of scope is clearly laid out.
- ❑ It is clear from reading the scoping document what the scope of the data strategy will be.

Scope Components

Data strategy scope addresses the following:

- ❑ Breadth: The different aspects the strategy will address (e.g. people, process, technology and data.)
- ❑ Depth: The level of detail the data strategy will have.
- ❑ Organizational coverage: Which part of the organization will the data strategy support.
- ❑ Planning horizon: When the target state will be reached and the length of the roadmap.

Data Strategy Scope

- ❑ There is some language in the data strategy explaining the scope of the data strategy.

Recommendations:

- Refer to section 1.3 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Data strategy scope example

Breadth

The data strategy will address process, people and culture, technology, sourcing, location and data changes.

Depth

The depth of coverage for the data strategy will be at the initiative level.

Organizational Coverage

The data strategy will cover the North American operations only.

Planning Horizon

The planning horizon of the data strategy will be to the end of 2023.

Data management capabilities: Target state assessment

Gaps and Omissions:

Additional Details

- ❑ A timeline is set out as to when Data will achieve the target state maturity.
- ❑ There is a short summary of what Data is lacking in the current state that needs to be improved to reach the target state.

Target State Maturity

- ❑ IT's target state maturity is clearly indicated and a reason is provided to explain why this target state maturity is selected.

IT Maturity Assessment

- ❑ A maturity scale is used to indicate the target state maturity of IT.

Recommendations:

- Refer to section 1.7 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Data management capability target state planning

Data Management Enablers and Information Dimensions

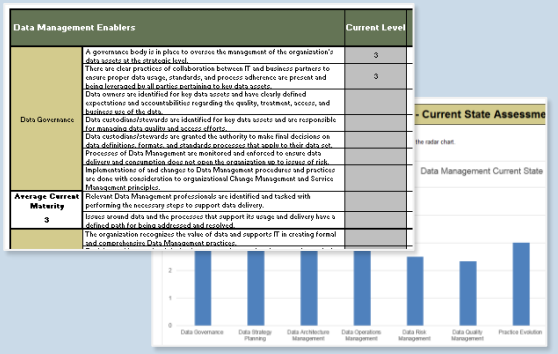
Data Management Enablers:

- Data Governance
- Data Strategy Planning
- Data Architecture Management
- Data Operations Management
- Data Risk Management
- Data Quality Management

Information Dimensions:

- Reference and Master Data Management
- Document and Content Management
- Big Data Management
- Metadata Management
- Corporate Enterprise Integration
- Business Intelligence and Analytics

Purpose: Assess and plan data management capabilities



Tabs 4-9
Step

- Evaluate current and target capabilities or data management
- Analyze performance gaps
- Develop plans for building DM practice capabilities

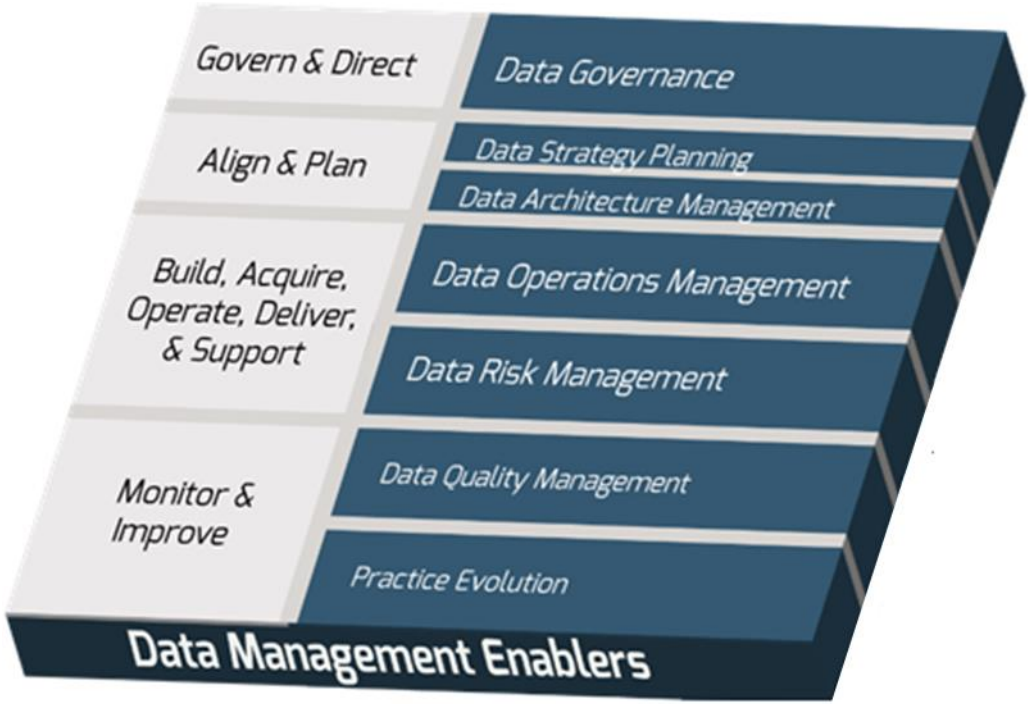
ITRG Data Management Assessment and Planning Tool

Optimized data management enablers means a strong foundation for the data strategy

Data Management Enablers:
Info-Tech categorizes data management enablers as the processes that guide the management of the organization's data assets and support the delivery.

Data Management Enablers:

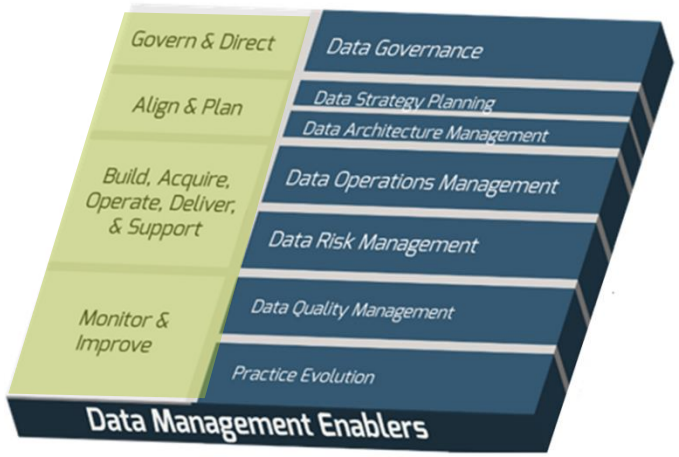
- ❑ Data Governance
- ❑ Data Architecture Management
- ❑ Data Operations Management
- ❑ Data Risk Management
- ❑ Data Quality Management
- ❑ Practice Evolution



Ensure you have a data management practice with strong process capabilities

What is Data Management?

Data management is the **planning, execution,** and **oversight** of policies, practices, and projects that ***acquire***, ***control***, ***protect***, ***deliver***, and ***enhance*** the value of data and information assets. (DAMA, 2009)



Govern and Direct

- Ensures data management practices and processes follow the standards and policies outlined for them
- Manages the executive oversight of the broader practice

Align and Plan

- Aligns data management plans to the business' data requirements
- Creates the plans to guide the design and execution of data management components

Build, Acquire, Operate, Deliver, and Support

- Executes the operations that manage data as it flows through the business environment
- Manages the business's risks in relation to its data assets and the level of security and access required

Monitor and Improve

- Analyzes the performance of data management components and the quality of business data
- Creates and execute plans to improve the performance of the practice and the quality and use of data assets

Key resources for your data strategy: People and skill sets

Having the right people and skill sets is another key component for an effective data strategy.

Some of the key roles for executing on your data strategy: The Management of Data

- Data Architects
- Database Administrators
- Data Engineers
- Data Integrators – ETL, ESB
- Data Analysts – Data Quality tools, data rules
- Data Scientists
- Data Risk Officers
- Data Privacy Officers
- Data Security Officers

- Chief Data Officer

Some of the key roles for executing on your data strategy: The Governance of Data

- Data Steward
- Data Custodian
- Data Owner
- Data Governance Working Group
- Data Governance Steering Committee
- Data Governance Council
- Executive Sponsor

Business and data needs alignment model assessment

Gaps and Omissions:

Presentation

- ❑ The relationship between each Data goal and their corresponding business goals can be succinctly explained to all audiences.

Connection to Business Goal

- ❑ The relationship between each Data goal and their corresponding business goals is intuitive. The audience can easily see why a particular Data goal is connected to a certain business goal.

Goal Alignment

- ❑ IT goal alignment to business goals is present.
- ❑ There is an established relationship between each Data goal and at least one business goal.

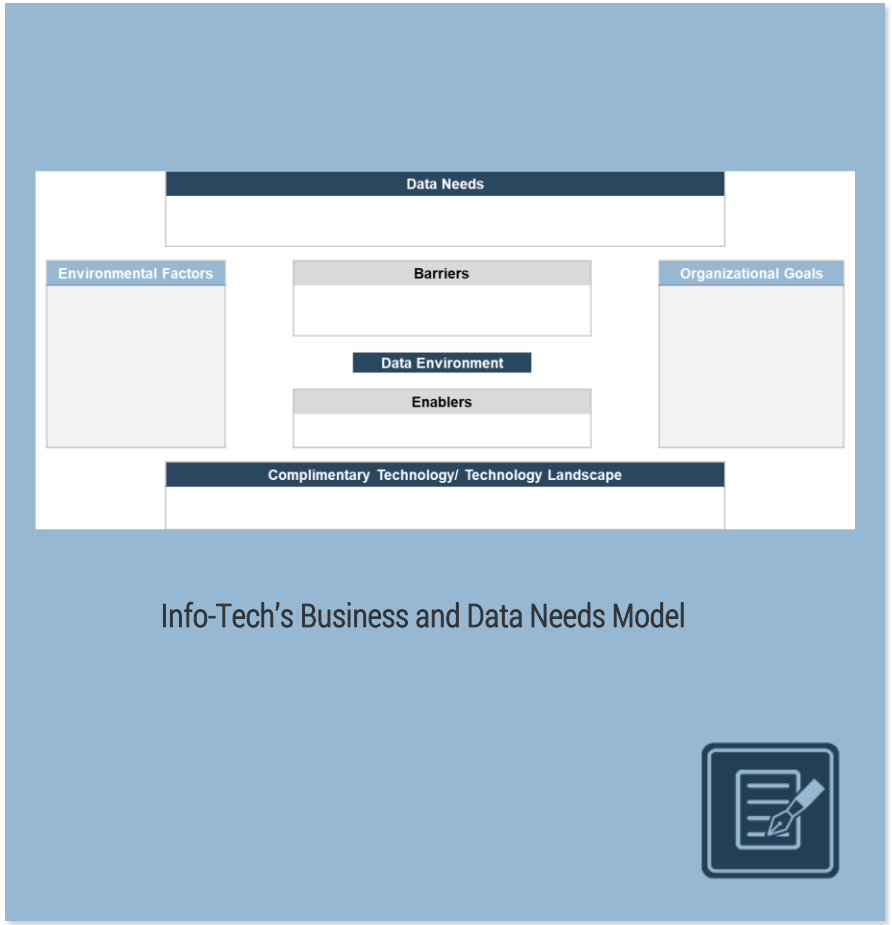
Recommendations:

- Refer to section 1.6 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Target state planning: Business and data needs alignment

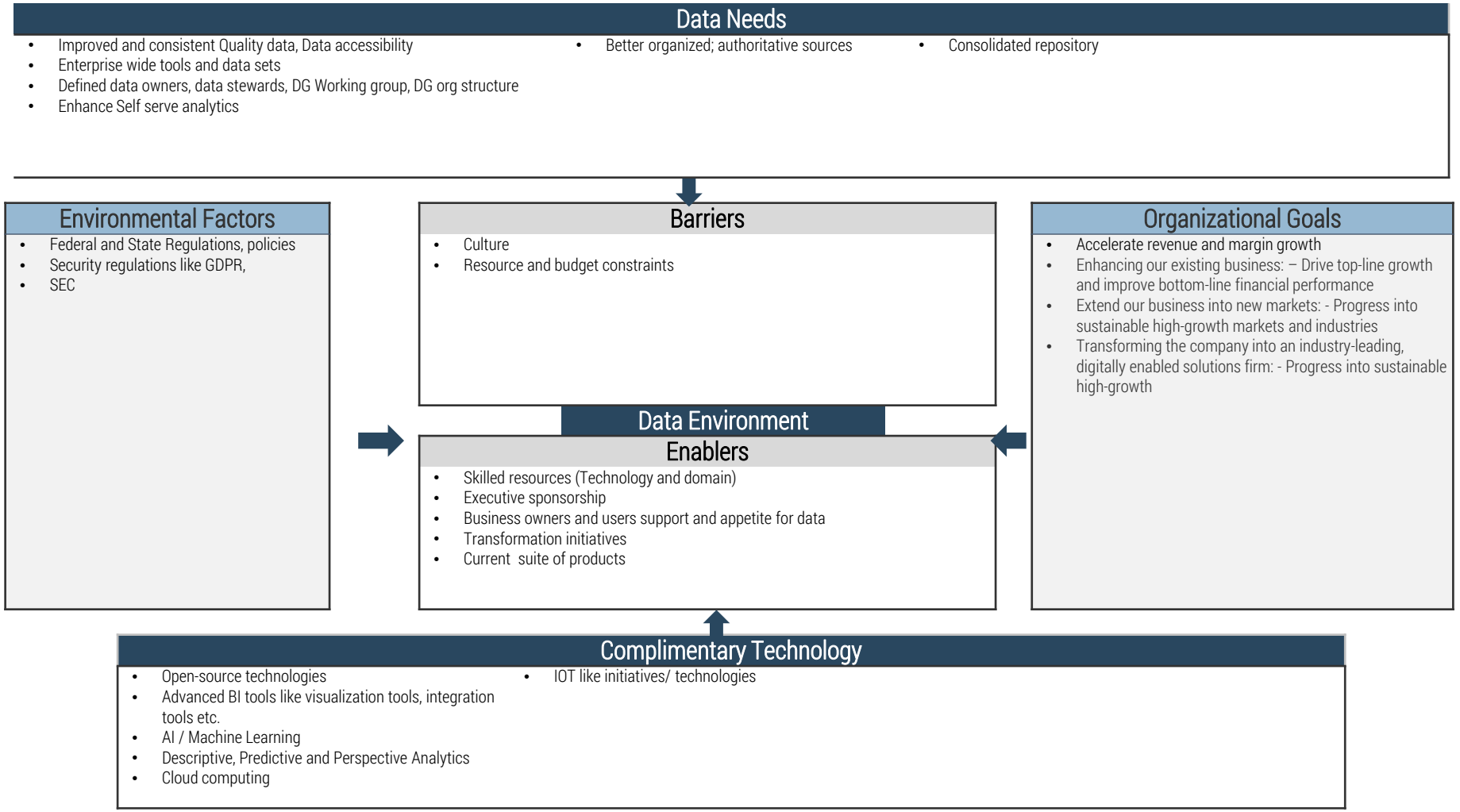
Info-Tech's Business and Data Needs Model

- Identifying the **organizational goals** and demonstrating how **data** supports those goals is key to a successful data strategy.
- Augmenting the business needs model with your internal **enablers** (those key pieces or things that you do well or have in place internally that would help drive the strategy) and **barriers** (things we need to be cognizant of, as they could potentially derail or inhibit the initiative, and you therefore need to plan mitigations for them) makes for a realistic and feasible representation
- Rounding out the model with factors in the **external environment** and examining the **technology market and trends landscape,** creates a holistic view of your data strategy.



Info-Tech's Business and Data Needs Model

Sample business and data needs modelling for data strategy



Sectional Assessment: Current State

Diagnostics and benchmarking assessment

Gaps and Omissions:

Comparisons and Details

- ❑ There is a benchmark provided in the data strategy that measures how Data compares to industry peers.
- ❑ The diagnostic data are analyzed, and areas of shortcoming are documented, for each of the diagnostics.

IT Leadership Diagnostic

- ❑ There is one diagnostic/survey completed by Data executives on Data effectiveness.

Business Leadership Diagnostic

- ❑ There is at least one diagnostic/survey completed by business stakeholders and users, that covers key areas such as data culture, user satisfaction around data, data literacy, ownership and stewardship,

Recommendations:

- Refer to Data Culture Survey

Diagnostics Example: Data Culture

A healthy data culture is key to amplifying the power of your data.

INFO~TECH RESEARCH GROUP

Data Culture Scorecard

Use this report to understand how your organization scores across 10 areas relating to data culture.

All questions were measured on 4-point scales of Very familiar to Not at all familiar, Always to Never, and Agree to Disagree.

Report Created for: Andy Neill
Company: Info-Tech Research Group

Ownership
How familiar are you with the information lifecycle management of the data and the relevant supporting policy (for example: metadata policy, retention policy) , as it relates to your business area?

Degree of Familiarity

Very Familiar	50%
Somewhat Familiar	0%
I have heard about that	0%
Not at all Familiar	50%

Governance
Are you fully aware of your organization's data security policy?

Degree of Familiarity

Very Familiar	0%
Somewhat Familiar	50%
I have heard about that	0%
Not at all Familiar	50%

Ownership
The data owner and data steward roles are formally defined, and documented within your organization.

Degree of Agreement

Agree	50%
Somewhat Agree	0%
Somewhat Disagree	50%
Disagree	0%

Ownership
Do you enforce standardized data retention rules within your area of work?

Frequency Degree

Always	0%
Sometimes	50%
Rarely	50%
Never	0%

Governance
How well do you think you comply with regulations such as "PII: Personal Identifiable Information" when collecting, using, handling and sharing information that is considered to be sensitive at your organization?

Frequency Degree

Always	0%
Sometimes	50%
Rarely	50%
Never	0%

Ownership
You understand role and responsibilities of the Data Owners and the Data Stewards.

Degree of Agreement

Agree	0%
Somewhat Agree	100%
Somewhat Disagree	0%
Disagree	0%

Governance
A governance body is in place to oversee the management of the organization's data assets at the strategic level.

Degree of Familiarity

Very Familiar	0%
Somewhat Familiar	0%
I have heard about that	100%
Not at all Familiar	0%

Data as an Asset
Do you feel your organization treats data as an asset by ensuring that quality data is readily available and accessible for your consumption and is appropriately secured and governed?

Degree of Agreement

Agree	0%
Somewhat Agree	50%
Somewhat Disagree	50%
Disagree	0%

Ownership
Is it clear to you who is the data owner for each data domain and who is (are) the data steward (s) for each data domain?

Degree of Familiarity

Very Familiar	0%
Somewhat Familiar	50%
I have heard about that	50%
Not at all Familiar	0%

Governance
Do you know the process to follow for resolving data related issues that you may encounter when using data (for example: when generating reports)?

Degree of Familiarity

Very Familiar	50%
Somewhat Familiar	50%
I have heard about that	0%
Not at all Familiar	0%

Data as an Asset
Do you feel that your organization leverages data to its full potential for supporting organization wide decision-making that provides value to your organization?

Degree of Agreement

Agree	0%
Somewhat Agree	50%
Somewhat Disagree	50%
Disagree	0%

A data culture diagnostic or survey will enable you to better understand the health of your data culture.

A healthy data culture is key to amplifying the power of your data.

Info-Tech's Data Culture diagnostic will help you begin that understanding.

What are the signs of a healthy data culture?

- Everybody knows the data.
- Everybody trusts the data.
- Everybody talks about the data.

This exercise will allow you to:

- Understand the organizational data culture
- Understand users' appetite for data
- Build an understanding of data in terms of governance, quality, accessibility, ownership and stewardship

This exercise should involve the following types of stakeholders:

- Data Architect
- Enterprise Architect
- Business Analyst
- Business stakeholders (data owners, data stewards)

Outcomes of this exercise

- An understanding of the current culture as it relates to the use and consumption of data
- An understanding as to whether data is currently perceived to be an asset at the organization.

A data-driven culture is an indicator of data being treated as an asset.

Prevailing themes of data-related issues assessment

Gaps and Omissions:

Common Themes Description

- ❑ For each theme, there is a description section that articulates the pain points experienced and the value gained from addressing the pain points.

Common Themes Data Gathering

- ❑ The common themes are gathered from at least three sources (e.g. multiple interviews and/or documents).
- ❑ The themes gathered are clearly identified in the data strategy.

Common Themes

- ❑ There is a section of the data strategy that outlines the key themes gathered from business stakeholder interviews and business document analysis.

Recommendations:

- Refer to the Stakeholder Interviews section in the blueprint Define the Business Context Needed to Complete Strategic Data Initiatives for instructions on how to complete.

Example: Prevailing themes of data-related issues at the organization

The key findings from stakeholder interviews/internal workshops were collated to provide a view of the prevailing data related issues faced by stakeholders. The key findings also speak to the organization's current Data Management maturity level and inform the target or desired future state for the organization's data management capabilities.

Prevailing Data Management Related Issues:
Stakeholder survey's (see Appendix E), group discussions, deep-dive activities, and a detailed maturity assessment revealed the following prevailing data management related issues across the areas as illustrated in the diagram below:

Current data capabilities assessment

Gaps and Omissions:

IT Capability Improvement Details

- ❑ For each Data Management capability, the reason for improvement is documented.
- ❑ For each Data Management capability improvement area, the diagnostic/assessment where the improvement suggestion is coming from is documented.

IT Leadership Assessment

- ❑ Data Management capabilities that are identified by Data leadership as needing improvement are documented.
- ❑ Themes identified by Data leadership are grouped and linked to Data capability improvement areas if applicable.

Business Leadership Assessment

- ❑ Data Management capabilities that are identified by business leadership as needing improvement are documented.
- ❑ Themes identified by business leadership are grouped and linked to Data capability improvement areas if applicable.

Recommendations:

- Refer to the Data Management blueprint

Sectional Assessment: Gap Analysis and Roadmap Planning

Overall gap analysis assessment

Gaps and Omissions:

Additional Gap Details

- There is a list of high level steps highlighting what needs to be enhanced, redesigned or maintained for each gap identified.

Gap Status

- Each gap in capability is given a status. For example:
  - Enhanced: The capability needs to be improved from its current state.
  - Develop/Redesign: The capability must be built new or completely revamped.

Overall Gap Assessment

- There is a section in the strategy that discusses gaps in Data capabilities from the current state to the target state.

Recommendations:

Target state data capability gaps assessment

Gaps and Omissions:

Linked to Data Goals

- ❑ These identified target Data capability gaps are linked to at least 1 Data goal.

Gap Status

- ❑ Each gap in capability is given a status. For example:
  - Enhanced: The capability needs to be improved from its current state.
  - Develop/Redesign: The capability must be built new or completely revamped.

IT Capability Gaps

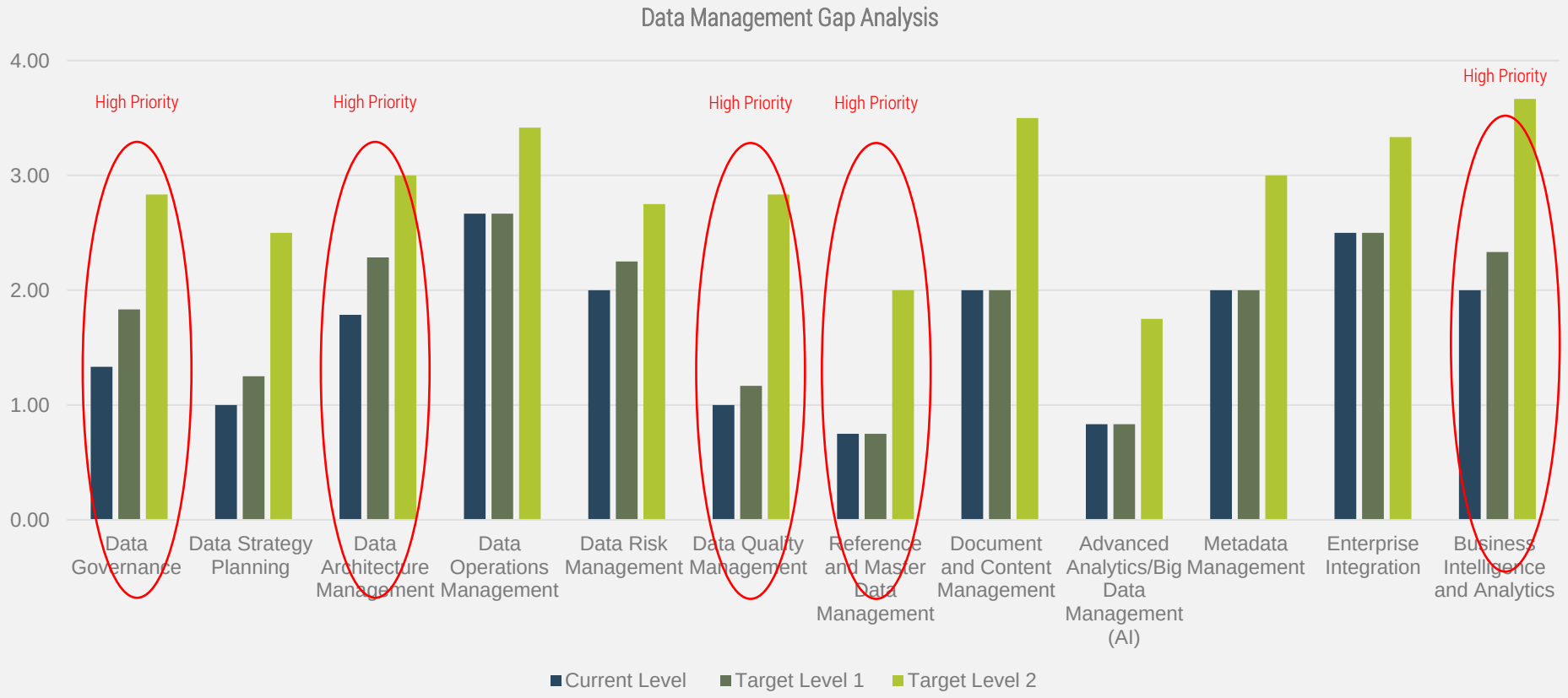
- ❑ There is a list of Data capabilities identified that are the focus areas to reach the Data target state.

Recommendations:

- Refer to section 3.1 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Example: Data management gap analysis and prioritization

Of the twelve Dimensions and Enablers assessed, the following five were prioritised for optimization: **Data Governance, Data Architecture Management, Data Quality Management, Reference and Master Data Management and BI and Analytics.**



*Note: Target Level 1 : Sept 2021; Target Level 2 : Sept 2023

Roadmaps assessment

Gaps and Omissions:

Roadmap Quality

- ❑ The roadmap is easy to understand and demonstrates the execution schedule of initiatives.
- ❑ There is a separate roadmap outlining the execution of critical Data initiatives vs. non-critical.

Roadmap Details

- ❑ The roadmap outlines distinct start and end dates of initiative execution.
- ❑ Each initiative on the roadmap is linked to the business or Data goal that Data supports.
- ❑ The roadmap contains at least 10 Initiatives.

Roadmap

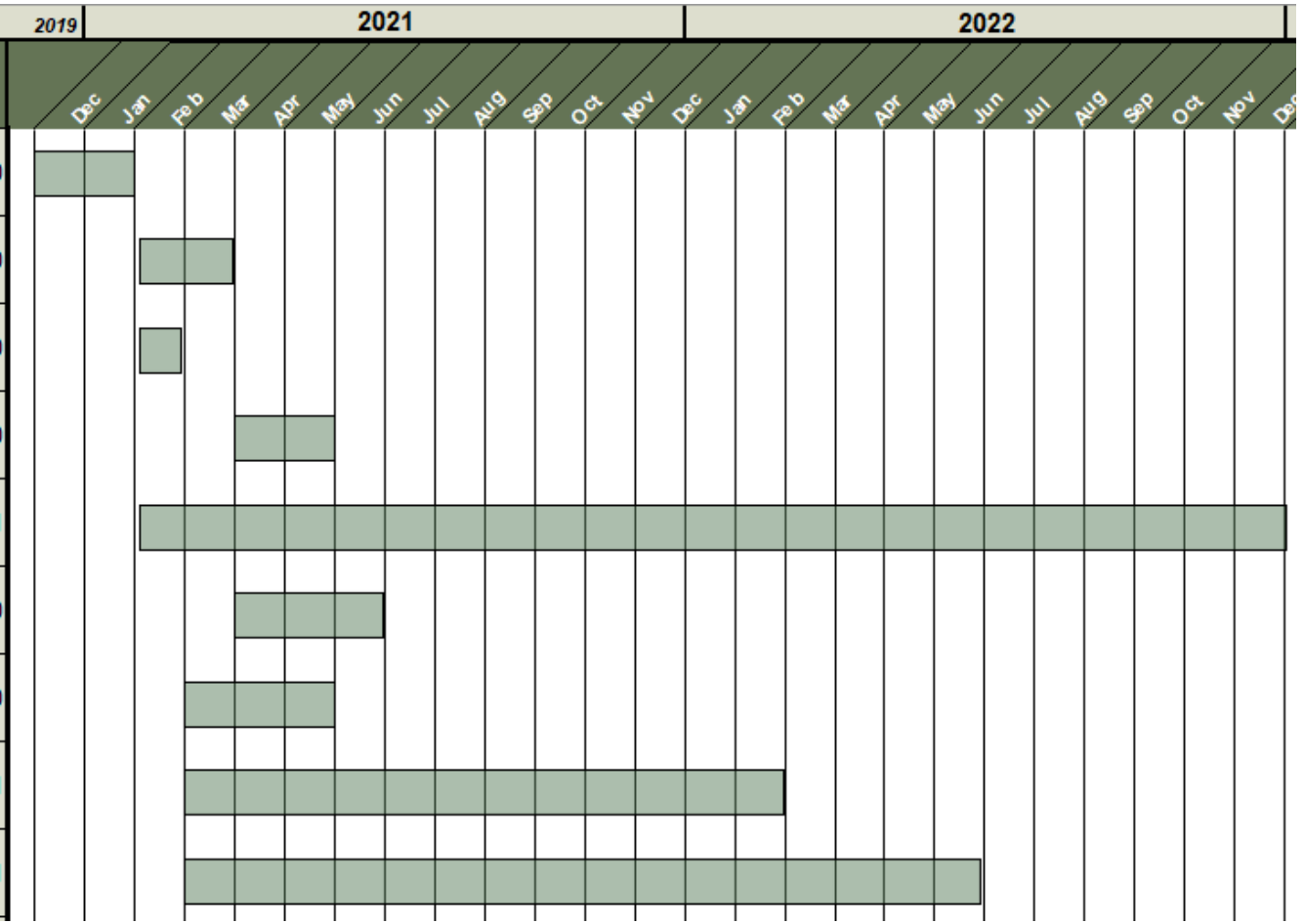
- ❑ There is a roadmap that depicts the execution schedule of Data initiatives in the data strategy.

Recommendations:

- Refer to section

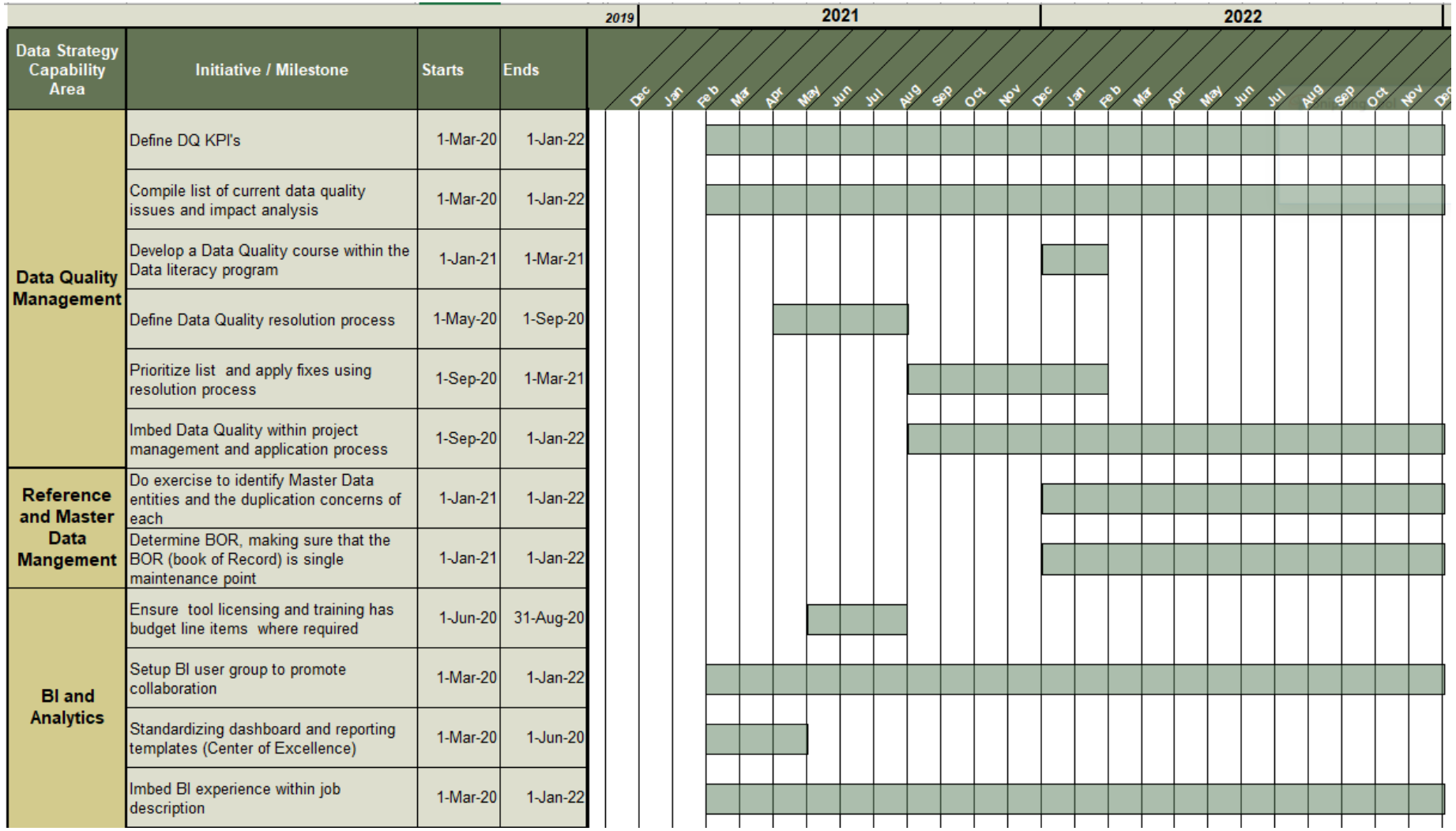
Roadmaps example

Data Strategy Capability Area	Initiative / Milestone	Starts	Ends
Data Governance	Establish Data Management Working Group from all business units and IT of ToO (Core)	1-Dec-19	31-Jan-20
	Term of Reference, work plans (communication, change management ...), major artefacts and scope defined	3-Feb-20	31-Mar-20
	Define key Data management and governance roles on Operational level (Data- Steward, Custodian, Owner)	3-Feb-20	28-Feb-20
	Executive Presentation (EMT/SMT)	1-Apr-20	31-May-20
	Standard Data Management tasks defined, communicated and injected within project management	3-Feb-20	31-Dec-21
	Establish Data Management Working Group - Wider User Group	1-Apr-20	30-Jun-20
Data Architecture	Complete Data Inventory as business entity level	1-Mar-20	31-May-20
	Complete Business Data Glossary	1-Mar-20	28-Feb-21
	BDG associated with Data Inventory at the right level	1-Mar-20	28-Jun-21



Roadmaps example

Data Strategy Capability Area	Initiative / Milestone	Starts	Ends
Data Quality Management	Define DQ KPI's	1-Mar-20	1-Jan-22
	Compile list of current data quality issues and impact analysis	1-Mar-20	1-Jan-22
	Develop a Data Quality course within the Data literacy program	1-Jan-21	1-Mar-21
	Define Data Quality resolution process	1-May-20	1-Sep-20
	Prioritize list and apply fixes using resolution process	1-Sep-20	1-Mar-21
	Imbed Data Quality within project management and application process	1-Sep-20	1-Jan-22
Reference and Master Data Mangement	Do exercise to identify Master Data entities and the duplication concerns of each	1-Jan-21	1-Jan-22
	Determine BOR, making sure that the BOR (book of Record) is single maintenance point	1-Jan-21	1-Jan-22
BI and Analytics	Ensure tool licensing and training has budget line items where required	1-Jun-20	31-Aug-20
	Setup BI user group to promote collaboration	1-Mar-20	1-Jan-22
	Standardizing dashboard and reporting templates (Center of Excellence)	1-Mar-20	1-Jun-20
	Imbed BI experience within job description	1-Mar-20	1-Jan-22



Communication plan assessment

Gaps and Omissions:

Roadmap Quality

- ❑ There is an outline of the message that is needed to be communicated to each group.
- ❑ There are deadlines to communicate the information to each group.

Communication Plan Details

- ❑ There are separate audience groups delineated in the communication plan.

Communication Plan

- ❑ There is a communication plan in place with the purpose to communicate the data strategy and/or changes to the data strategy.

Recommendations:

- Refer to section 3.16 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Communication plan example

In order to ensure that XXXX's Data strategic plan is clearly communicated across both the Data and business organizations, the following rollout strategy was developed.

Audience	Channel	Level of Detail	Description	Timing
Data Management Team	Email, Meetings	All	• Distribute plan; solicit feedback • Address manager questions to equip them to answer employee questions	Q4 2018, (October, before entire data team)
Data Team	Email, Q&A sessions following	Data Management summary deck	• Roll out after corporate strategy, in same form of communication • Solicit feedback, address questions	Q4 2018 (late November)
Select business stakeholders	Presentations	Executive deck	• Pilot test for feedback prior to Executive engagement	Q4 2018; early December
Executive Team	Email & Briefing	Executive deck	• Distribute plan	Q1 2019

Refresh plan assessment

Gaps and Omissions:

Refresh Plan Quality

- ❑ Each trigger outlined shows which portions of the data strategy will be refreshed.
- ❑ The audience involved in the refresh is clearly defined.

Refresh Plan Details

- ❑ The refresh plan outlines triggering events that will begin a refresh of the data strategy.

Refresh Plan

- ❑ There is a section in the data strategy that addresses how often the data strategy will be refreshed.

Recommendations:

Refresh plan example

The Data strategic plan is not meant to be a static one-time review, but rather an evolving roadmap that continues to align with business and industry needs. To this end, the following refresh plan was established.

Frequency	Audience	Scope
Annually	Business stakeholders, IT	• Re-survey • Review / validate strategy
Quarterly	IT management team	• Initiatives status updates • Business updates • New projects • Risks / constraints • Changes in priorities • Updates
Every 3 years (2021)	Senior management IT leadership	• Full Planning

Sectional Assessment: Risk and Feasibility Analysis

Data internal and external factors assessment

Gaps and Omissions:

Analysis Details

Analysis of each area includes:

- ❑ Data Management, Reporting, Analytics, Data Science etc., capabilities
- ❑ Staff skillset
- ❑ Organizational culture
- ❑ Political, environmental, technological, social changes

Lens of Analysis

The analysis includes the following perspectives:

- ❑ Strength: The areas that the department does well in.
- ❑ Weakness: The areas that the department does not do well in.
- ❑ Opportunities: External factors that the department can leverage.
- ❑ Threats: External factors that can threaten the influence of the department.

Internal and External Factors

- ❑ There is an analysis of internal and external factors impacting the Data department.

Recommendations:

- Refer to section 2.6 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

A SWOT analysis will help identify both the internal and external factors impacting data environment

A **SWOT analysis** will provide an opportunity to self-assess your **data foundation**: the **data management enablers** and **key resources and skillsets**.

SWOT stands for strengths, weaknesses, opportunities, and threats. Each word is a category of internal and external factors that could impact the data strategy and must be taken into consideration.

	Helpful *to achieving* ***the objective***	**Harmful** *to achieving* ***the objective***
Internal origin *attributes of the* ***organization***	Strength	Weaknesses
External origin *attributes of the* ***environment***	Opportunities	Threats

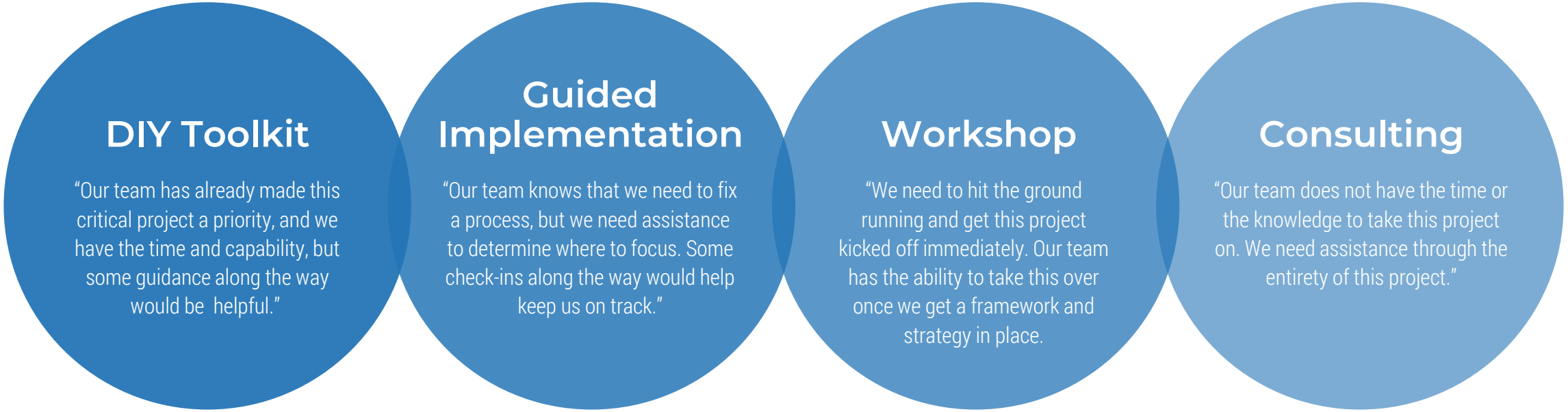
Review these questions to help you conduct your SWOT analysis on your current data management

Strengths **(Internal)**	Weaknesses **(Internal)**
• How does the Data Management department succeed at supporting the business? • Which Data Management services are known for being the most effectively delivered? • Which Data Management capabilities and enablers are the most mature? • Are the Data Management department's people professional, knowledgeable, and talented? • Is the Data Management department good at innovating?	• What areas of your Data Management department require improvement? • If your end users were to provide you with constructive criticism, what would it be about? • Is the IT/Data Management budget sufficient? (This can also be a strength.) • Are the Data Management processes well documented? Monitored? Are people trained on performing the processes? • How strong is the IT - Business communication and alignment? (This can also be a strength.)
Opportunities (External)	**Threats (External)**
• Are there any vendors or external partners that can help the Data Management department deliver better solutions? • Do cloud solutions provide any opportunities? • Do we plan on taking advantage of technology trends such as the internet of things, AI, ML? • Are there any business trends in your organization's industry that would need Data Management support? • Are there any technology trends that your competitors are implementing or thinking of implementing?	• Are there any obstacles external to the IT and Data Management department that will impact your ability to achieve success? • Has there been an increase in the frequency of security breaches in your industry? • Is shadow IT/Shadow BI/rogue reporting prevalent at your organization? • Have there been regulatory changes likely to drastically change the way data solutions/IT solutions are delivered? (e.g.: GDPR)

Risk and feasibility analysis: SWOT analysis

	Helpful *to achieving the objective*	Harmful *to achieving the objective*
Internal origin *attributes of the organization*	**Strengths** • Executive/Senior leadership support • Masses of data (rich data: growing volume and variety of data) • Desire to get to data driven culture • Bench-strength • Highly pragmatic orientation; Service orientation • Strong internal collaboration/communication • People – hard working, quality work, skilled, engaged • Strong technology change management process • Business Relationship Consultants • Customer communication and engagement (maintenance) • Project management capability has improved • High availability of systems	**Weaknesses** • Inconsistent approach to gathering data for use in reports (even within a team) • Lack of flexibility within the main system for customization. Data needs to be massaged to be made useful • Training gap (different levels of proficiency) • CRM data not connected to BI • Lots of manual work required to create reports • Fast paced/ad hoc approach (duct tape) • Not as nimble as we like • Limited self-service functionality. There is a strong reliance on IT for provisioning reports • Evolving business models are not supported by current systems • Lack of documentation – heavy reliance on institutional knowledge
External origin *attributes of the environment*	**Opportunities** • Cloud computing, SaaS, disruptive technology • Enterprise tools (PM, testing, monitoring, automation, etc.) • Leverage public private partnerships • Population growth increases talent pool, revenue • Become more flexible and agile • Ongoing risk management	**Threats** • Dependence on Service provider from a systems-perspective (especially with recent merger announcement) • Competitors have complete control over their own systems • Changing model of the industry (difficult to adapt to new models) • Competitors are effectively leveraging their existing systems (i.e.. nimble and modern CXM suites enable them to respond to market pressures on a timely basis) • Non-traditional competitors that can easily pivot; substitute products • Outages of external vendors • Economic downturn, Change in government / officials / policy / legislation

Info-Tech offers various levels of support to best suit your needs



Diagnostics and consistent frameworks are used throughout all four options.

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Appendix

Data strategy review project metrics

Use the following metrics to calculate the monetary value generated enhancing your data strategy through the review.

Monetary Gain

*(# of Data initiatives cancelled * the budget for each cancelled initiative)*

+

*(# of new Data initiatives added * the budget for each added Data initiative)*

Headcount Gain

(# of employee headcount increased as a result of data strategy enhancement from review)

IT Cost Reduction Improvement

IT's % of total budget reduced after enhancement

–

organization's budget reduction benchmark

Common themes example

Themes	Description
Project Prioritization	There is a lack of clear project prioritization from the business side, which has caused resources to be spread too thin resulting in delays or delivery quality issues. Ensuring priority projects align with long-term strategy will help dedicate the necessary capacity toward the most important tasks.
Adaptive Technology	Technology available for internal and client-facing processes has not kept up with the rate of change of the business, which is driven by industry change and customer expectations.
Regulatory Changes	Regulatory changes, as well as the rate of regulatory change, are areas where Data can play a role in ensuring compliance.
Security	With increasing digitization, the organization opens itself up to more cyber security risk. Given the nature of the industry, a security breach would present a significant risk to the company's reputation.
Innovation	There is a need to achieve a balance between incremental and disruptive innovation. Data needs to be an advisor to the business in terms of emerging technology that can help solve business problems.
IT as Business Partner	IT and the business need to work together to generate solutions for business problems. For this to work, Data needs to build business awareness, and the business needs to engage Data in strategic conversations early in the process.
Business Growth	The business is growing through M&A as well as organically. Furthermore, growing diversity of product and revenue demands are creating technological and cultural challenges.
Digitized Onboarding	A faster and more seamless experience for customers is a business priority. Digitized onboarding will accomplish this by streamlining the current process, which relies heavily on paper forms.
Succession Planning	Certain Data staff are essential through their vast and specialized knowledge, and their loss would present a significant risk. A highly tenured workforce is both a strength and a challenge in terms of ensuring the organization has the right skills to keep up with industry changes and aligning skillsets with long-term strategy.

External analysis assessment

Gaps and Omissions:

External Factor Completeness

- ❑ The external analysis take into account these six factors: Political, Economic, Social, Technological, Legal, and Environmental.

External Factors

- ❑ There is an analysis based on the at least three different external factors (e.g. Political, Economic, Social etc.)

Basic External Analysis

- ❑ There is an analysis on external factors impacting the organization.

Recommendations:

- Refer to the PESTLE Analysis section in the blueprint Define the Business Context Needed to Complete Strategic Initiatives for instructions on how to complete.

PESTLE example

Political	• Federal taxation changes • Foreign government market impact • **GDPR** • **Brexit driven market fluctuations** • **NAFTA changes** • **Currency impact** • **Political impacts on regulatory compliance** • **Impact on discretionary income of clients**	• Markets fluctuations driving investment • **Hedging opportunities** • **Outsourcing infra – reliability** • **Regulatory impact – filing requirements** • **Market rate impacts for talent** • **M&A impacts**	Economic
Social	• Demographics – aging client base • **How to attract Millennials** • **Social tools – instant feedback, peer tools** • **Social conscience – environmental, cyber-security** • **Market social responsibility**	• Constant demand for "the best" • **Always something new** • **Fear of change** • **Solution decision** • **In-house vs cloud** • **XAAS** • **RPA** • **Cloud** • **AI**	Technological
Legal	• Legal impact of business processes / decisions • **Changing regulatory rules** • **New rules that drive policy creation and compliance** • **Educating staff on regulations and implications of non-compliance** • **New industry standards – focusing on client interaction** • **Audit requirements** • **Privacy impacts and compliance – mandatory reporting**	• Push to being environmentally friendly • **Reduction in paper** • **Reduction in energy consumption** • **DR BC**	Environmental

Target state data capability gaps example

Legend: Maintain | Enhance | Redesign / Develop

Provide predictable and resilient systems, services and solutions.

Create seamless end-to-end interactions that drive value and satisfaction.

Foster a culture that succeeds through communication, execution and leading by example.

Promote an organization built on continuous improvement and adaptability.

Deliver solutions, systems and data that focus on delivering value.

Organizational Change Management	Innovation	Cost Optimization	Business Intelligence and Reporting	Application Design and Management
Stakeholder Relations	Business Value	Security Management	Data Quality	Enterprise Architecture
Business Value	Application Development Throughput	Project Delivery (PM, PPM, RG)	Data Architecture	Requirements Gathering
IT Organizational Design	Organizational Change Management	Human Resources Management	Requirements Gathering	Business Value
Manage Service Catalogs	Performance Measurement	Service Management	Business Value	Security Management

IT target state maturity example

The data team currently operates at the upper level of *Firefighter*, on the cusp of *Trusted Operator*.

By the end of the current Data strategic plan, in 2021, the team would like to move up the maturity ladder to *Business Partner*

It is important to note, that the Data organization currently has processes and capabilities that operate in the higher levels, but overall functions as a Firefighter.

Innovator - Transforms the Business
Reliable Technology **Innovation**

Business Partner - Expands the Business
Effective Execution on Business **Projects**, Strategic Use of **Analytics** and **Customer Technology**

Trusted Operator - Optimizes the Business
Effective Fulfillment of **Work Orders**, Functional **Business Applications**, and Reliable **Data Quality**

Firefighter - Supports the Business
Reliable **Infrastructure** and Data **Service Desk**

Unstable - Struggles to Support
Inability to Provide Reliable Business Services

IT target capabilities assessment

Gaps and Omissions:

Prioritized Data Capabilities

- ❑ There is a prioritization to the listed capabilities.

Linkage to Data Goals

- ❑ The list of capabilities are linked to at least one Data goal.
- ❑ The linkage of Data goals to target Data capabilities are clearly indicated.

Identified Data Capabilities

- ❑ A set of Data capabilities are identified as important for Data to reach the target state.

Recommendations:

- Refer to section 1.8 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

IT target capabilities example

Provide predictable and resilient systems, services and solutions.	Create seamless end-to-end interactions that drive value and satisfaction.	Foster a culture that succeeds through communication, execution and leading by example.	Promote an organization built on continuous improvement and adaptability.	Deliver solutions, systems and data that focus on delivering value.
Organizational Change Management	Innovation	Cost Optimization	Business Intelligence and Reporting	Application Design and Management
Stakeholder Relations	Business Value	Security Management	Data Quality	Enterprise Architecture
Business Value	Application Development Throughput	Project Delivery (PM, PPM, RG)	Data Architecture	Requirements Gathering
IT Organizational Design	Organizational Change Management	Human Resources Management	Requirements Gathering	Business Value
Manage Service Catalogs	Performance Measurement	Service Management	Business Value	Security Management

Current data budget assessment

Gaps and Omissions:

Additional Details for Budget

- ❑ A visual representation of capital and operating expenditure increase or decrease is in place for the entire duration of the data strategy.

Details for Budget

- ❑ A visual representation of capital and operating expenditure increase or decrease between the current fiscal year or subsequent fiscal year is present.

Basic Budget Information

- ❑ Capital expenditure and operating expenditure totals are outlined for the current fiscal year and the subsequent fiscal year.

Recommendations:

- Refer to section 2.5 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

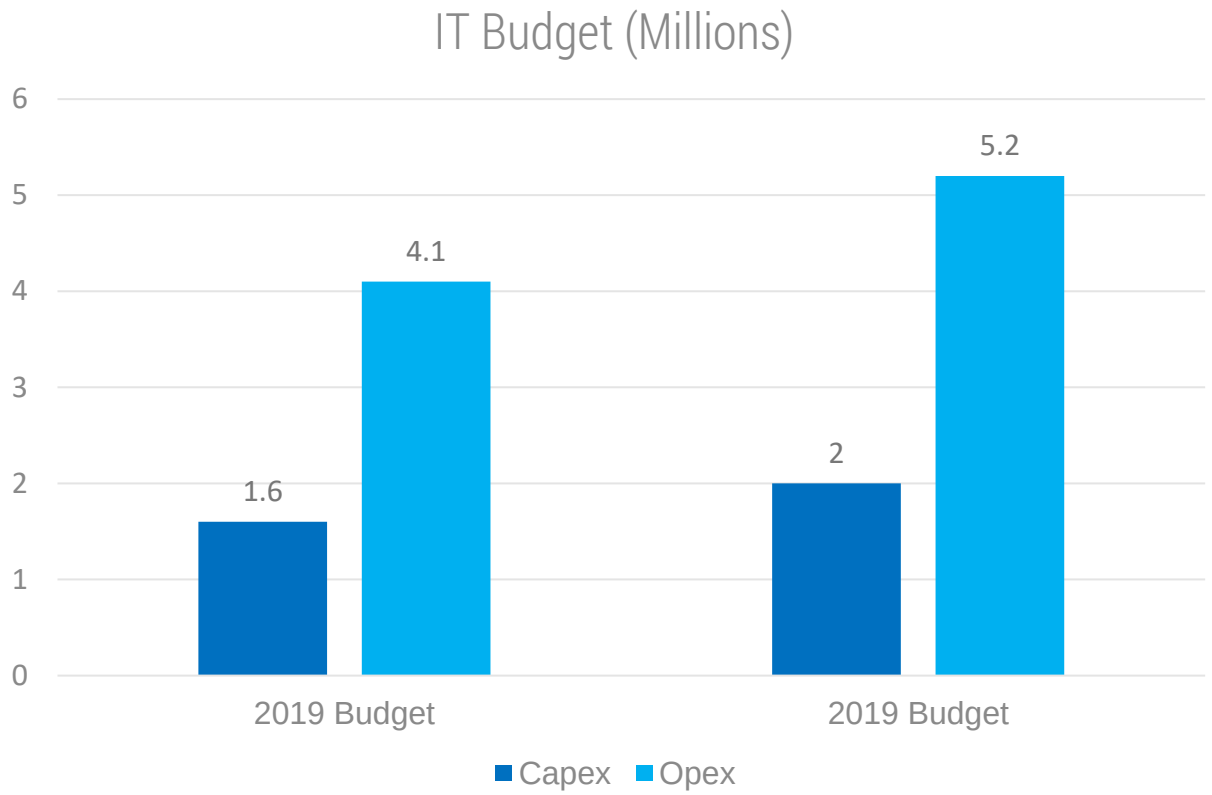
Current data budget example

2018 – Capex $1.6 million, OpEx $4.1 million

- 2018 OpEx includes $1.8M in salaries, $1.0M for SW and HW maintenance, $500k for telephony and data, and $500k for consulting

2019 – Capex $2.0 million, OpEx $5.2 million

- 2019 OpEx includes $2.2M in salaries, $1.0M for SW and HW maintenance, and $800k for consulting



Future data budget assessment

Gaps and Omissions:

Future Data Budget Quality

- ❑ Each newly brainstormed Data initiative has a budget estimation that can be traced to the "future Data budget required."
- ❑ The future Data budget required is broken down for each Data initiative in the time horizon of the data strategy.

Future Data Budget Details

- ❑ There are high-level calculations that show how the numbers were arrived at.
- ❑ There is a visual representation of the change in budget from the current fiscal year to the future Data budget.

Future Data Budget

- ❑ There is a "future Data budget required“ section in the data strategy.

Recommendations:

- Refer to section 3.12 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

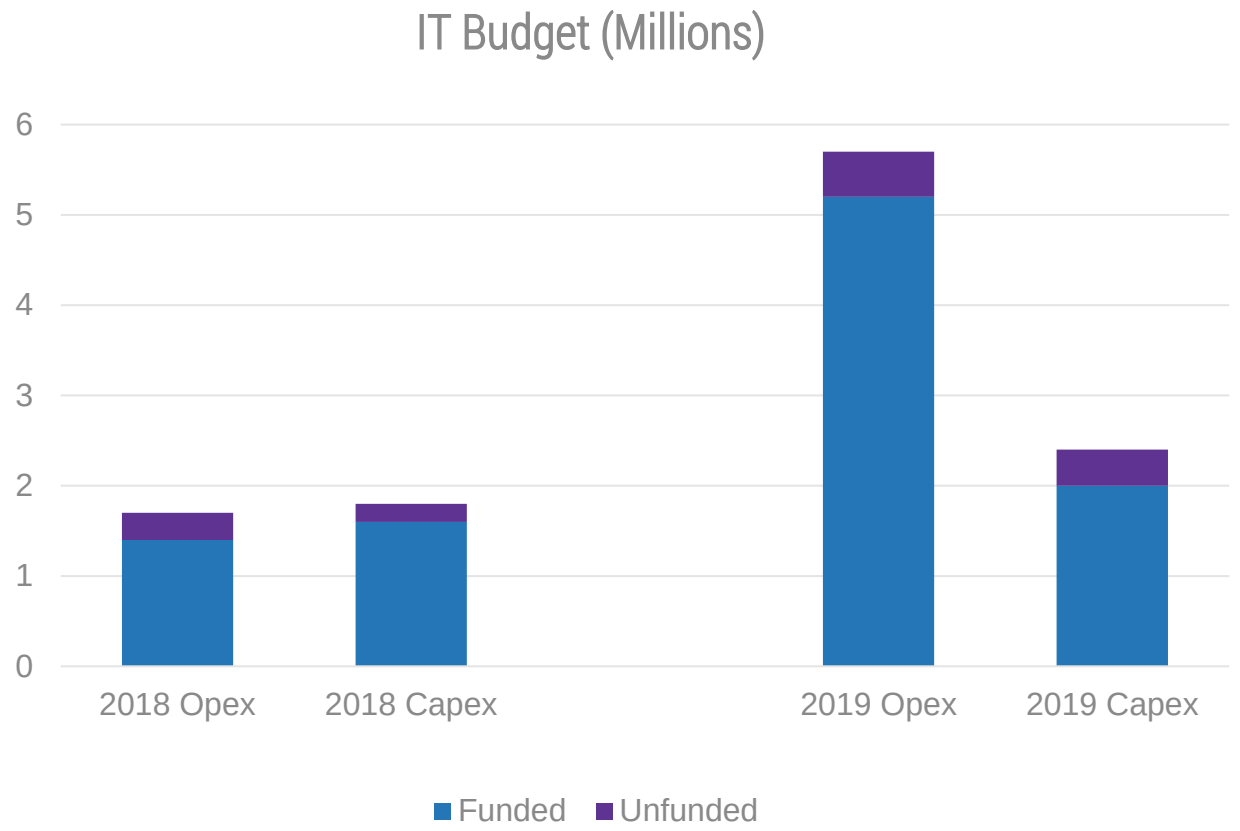
Future data budget example

2018 – Capex $1.6 million, OpEx $4.1 million

- 2018 OpEx includes $1.8M in salaries, $1.0M for SW and HW maintenance, $500k for telephony and data, and $500k for consulting

2019 – Capex $2.0 million, OpEx $5.2 million

- 2019 OpEx includes $2.2M in salaries, $1.0M for SW and HW maintenance, and $800k for consulting



Current data initiatives to data goals assessment

Gaps and Omissions:

Linked to Data Goals

- ❑ IT initiatives are linked to Data goals in a visual manner.
- ❑ Each critical current Data initiative is linked to at least one Data goal.
- ❑ Each Data goal has at least two current Data initiatives linked to it.

IT Initiative Delineation

- ❑ There is a delineation between critical current Data initiatives vs. non-critical.

Current Data Initiatives

- ❑ There is a list of current Data initiatives.

Recommendations:

- Refer to section 3.3 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Current data initiatives to data goals example

Provide predictable and resilient systems, services and solutions.

- Refresh end-user devices
- Application lifecycle management review & analysis
- Data Analytics roadmap
- Service Management enhancement
- MDM Project

Create seamless end-to-end interactions that drive value and satisfaction.

- Call center upgrade
- Website refresh

Foster a culture that succeeds through communication, execution and leading by example.

- Data strategy rollout to data team
- Job shadowing within Data and between Data and business
- Reward program for Data employees
- IT culture review with senior leadership
- IT recruitment process review

Promote an organization built on continuous improvement and adaptability.

- ERP assessment
- Tool and vendor evaluation for testing automation
- Service desk software and asset management tool upgrade
- Current industry membership review
- Engagement of 3rd parties for learning and training
- Quarterly updates at Executive meetings

Deliver solutions, systems and data that focus on delivering value.

- Enterprise architecture tool assessment
- Review of intake process for business projects
- Review of intake process for Data projects

Current data initiatives to business goals assessment

Gaps and Omissions:

Linked to Business Goals

- ❑ IT initiatives are linked to business goals in a visual manner.
- ❑ Each critical current Data initiative is linked to at least one business goal.
- ❑ Each business goal has at least two current Data initiatives linked to it.

IT Initiative Delineation

- ❑ There is a delineation between critical current Data initiatives vs. non-critical.

Current Data Initiatives

- ❑ There is a list of current Data initiatives.

Recommendations:

- Refer to section 3.4 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Current data initiatives to business goals example

Delivery Excellence	Client Experience	Employee Experience	Operational Excellence	Corporate Growth
Refresh end-user devices	Call center upgrade	Data strategy rollout to data team	ERP assessment	Enterprise architecture tool assessment
Application lifecycle management review & analysis	Website refresh	Job shadowing within Data and between Data and business	Tool and vendor evaluation for testing automation	Review of intake process for business projects
Data Analytics roadmap		Reward program for Data employees	Service desk software and asset management tool upgrade	Review of intake process for Data projects
Service Management enhancement		IT culture review with senior leadership	Current industry membership review	
MDM Project		IT recruitment process review	Engagement of 3rd parties for learning and training	
			Quarterly updates at Executive meetings	

Future data initiatives to data goals assessment

Gaps and Omissions:

Linked to Data and Business Goals

- ❑ Future Data initiatives are linked to Data and business goals in a visual manner.
- ❑ Each critical future Data initiative is linked to at least one Data and business goal.

IT Initiative Clarity

- ❑ Each future Data initiative can be traced to one of the Data capability gaps that were identified.

Future Data Initiatives

- ❑ There is a distinct list of Data initiatives that are define to address the gaps in the data strategy
- ❑ There is a delineation between critical future Data initiatives vs. non-critical.

Recommendations:

- Refer to section 3.7 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Future data initiatives to data goals example

Provide predictable and resilient systems, services and solutions.	Create seamless end-to-end interactions that drive value and satisfaction.	Foster a culture that succeeds through communication, execution and leading by example.	Promote an organization built on continuous improvement and adaptability.	Deliver solutions, systems and data that focus on delivering value.
Service catalogue creation	Formalize organizational change management	Add Data policies to meet gaps	Improve data quality using standards	Establish enterprise architecture practice
Formalize organizational change management	Implement performance management		Enhance requirements gathering process	Design security strategy
Redesign Data organization			Establish data architecture practice	
Improve stakeholder relations				
Enhance business value analysis for projects				

IT initiative profile assessment

Gaps and Omissions:

Initiative Profile Details

For each Data initiative:

- ❑ There is an indication of required budget, whether Data is actual or estimated.
- ❑ There is an individual accountable for the initiative.
- ❑ The business benefits are summarized for the initiative.
- ❑ The dependencies are summarized.
- ❑ The risks to the organization are summarized.

Initiative Profile

- ❑ There is an Data initiative profile for each Data goal identified.
- ❑ There are least three Data initiatives linked to an Data goal in the initiative profile.

Recommendations:

- Refer to section 3.9 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Future data initiatives to data goals example

Provide predictable and resilient systems, services and solutions.

Initiative & Timeline	Details		Key Steps & Business Benefits
Refresh end-user devices Started → Q2/19 $$ - funded	Accountable:	xxxx	Update technology, performance & productivity
	Dependencies:	None	
	Risks:	Supplier, implementation, compatibility, resources	
Application lifecycle management review & analysis Q1/19 → Q1/19 $ - funded	Accountable:	xxxx	Efficiency, operational excellence, simplicity, flexibility, capacity, continuous improvement
	Dependencies:	Resources	
	Risks:	Resources	
Data Analytics roadmap Started → Q4/18 $$$ - funded	Accountable:	xxxx	Improved analytics and data accessibility and quality
	Dependencies:	Infrastructure, security	
	Risks:	Data access and integration, resources, knowledge management	
Service Management enhancement Started → Q4/18 $$ - unfunded	Accountable:	xxxx	Customer service, operational excellence, data capture, employee experience
	Dependencies:	Data lake, people, process	
	Risks:	Scope	
MDM Project Started → Q4/18 $$ - unfunded	Accountable:	xxxx	Customer service, operational excellence, data capture, employee experience
	Dependencies:	None	
	Risks:	Vendor	

IT initiative prioritization example

The Data initiatives were prioritized against the Five Business Goals, each weighted according to IT's potential impact.

Prioritization Criteria	Weighting
Criteria #1	20%
Criteria #2	15%
Criteria #3	25%
Criteria #4	10%
Criteria #5	30%

Initiative	Priority
Data Analytics roadmap	1
Enterprise architecture tool assessment	2
Refresh end-user devices	3
Service Management enhancement	4
MDM Project	5
IT recruitment process review	6
Service desk software & asset management tool upgrade	7
ERP assessment	8
Application lifecycle management review & analysis	9
Engagement of 3rd parties for learning and training	10
Call centre upgrade	11
IT culture review with senior leadership	12
Review of intake process for business projects	13
Review of intake process for Data projects	14
Current industry memberships identification	15
Tool and vendor evaluation for testing automation	16
Data strategy rollout to data team	17
Job shadowing within Data and between Data and business	18
Reward program for Data employees	19
Quarterly updates at executive meetings	20
Website refresh	21

Roadmaps example

IT Goal	Initiatives	2018	2019				2020				Ongoing
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Provide predictable and resilient systems, services and solutions.	Refresh end-user devices										
	Application lifecycle management review & Analysis										
	Data Lake										
	Service Cloud										
	MDM Project										
Create seamless end-to-end interactions that drive value and satisfaction.	Call center upgrade										
	Website refresh										
Foster a culture that succeeds through communication, execution and leading by example.	Data strategy rollout to data team										
	Job shadowing within Data and between Data and business										→
	Reward program for Data employees										→
	IT culture review with senior leadership										→
	IT recruitment process review										→

IT implications assessment

Gaps and Omissions:

Seven Perspectives

The Data implications analysis for each goal covers the following seven perspectives:

- ❑ **People:** What are the possible effects on Data from a roles and capacity perspective?
- ❑ **Process:** What impacts to processes, their complexity, documentation, etc., would occur as a result of the business context?
- ❑ **Technology:** What changes to applications and infrastructure need to happen to facilitate the directions set out in business context?
- ❑ **Data:** What are the changes from a data and information perspective that need to occur as a result of the business context?
- ❑ **Sourcing:** What sourcing changes and decisions need to be made to facilitate the business context?
- ❑ **Location:** What additional locations or changes to locations might affect IT?
- ❑ **Timing:** What changes in cycle time need to occur to enable the business context? What are the timing dependencies from the business context that need to be factored in to prioritize Data projects?

IT Implications

- ❑ There is a list of Data implications called out in the strategy.
- ❑ The Data implications are clearly based on the business goals and their corresponding business capabilities/business initiatives.

Recommendations:

- Refer to section 1.2 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.
- Refer to the "IT Implications Checklist" to assist you with completing this activity.

IT implications example

Business Goal & Business Initiatives	IT Implication
Delivery Excellence Data and Analytics Issue Resolution Improve Employee Mobility	• Need more cross-training to ensure Data isn't "one deep" in terms of expertise. • May have to leverage consultants in order to manage processes (can help with staffing issues) • Communication around setting expectations will have to be improved • Need to look at what Data currently has and what is needed to support the business to the level the business wants (example: what staffing levels are needed in order to support the business) • Service Level Agreements (SLA) would help to improve customer service • Need to identify primary owners for support, who the contacts are if you need to go back to the vendor • Need to refine processes to make them more streamlined (onboarding, training) • Unclear who owns data currently, need to formalize this – need to formalize data retention policies as well • Need to identify the customer expectations for Data support and coverage • Need to look at resource capacity to better handle demand management • Customer participation will be critical to this goal • Require consistency in processes from the customers in order to know how to act moving forward • Need to stay current with technology • Need to define and build the relationship between the Data and OT group (define roles and responsibilities) • Need to define a standard processes around communication • IT needs to learn more about the different business units • Define Data requirements across different department budgets

IT vision and mission statements assessment

Gaps and Omissions:

Connection to Organization

The statements follow these characteristics:

- ❑ Vision statement: Describes a desired future. Focuses on ends, not means. Aspirational. Memorable. Concise.
- ❑ Mission Statement: Articulates purpose. Describes how to achieve the vision. Easy to grasp. Sharply focused.

- ❑ The data team can clearly articulate how the statements support the organization.
- ❑ The wording in the statements is succinct. The wording conveys the exact meaning of the statements.

IT Vision and Mission Statement

- ❑ There is a Data vision statement and Data mission statement present in the data strategy.
- ❑ Vision and mission statements reflect the key characteristics outlined for effective statements.

Recommendations:

- Refer to section 1.4 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.
- Refer to the "IT Vision Mission and Guiding Principles Guide" to assist you to complete.

IT vision/mission statements example

Vision

To be a trusted technology partner empowering the business through innovation and efficiency.

Mission

We deliver the best technological solutions for new and existing business opportunities through collaboration with our stakeholders.

IT guiding principles assessment

Gaps and Omissions:

Characteristics and Additional Context

The Data principles meet the characteristic that will make them adhered to and relevant.

- ❑ Organization specific
- ❑ Long lasting
- ❑ Prescriptive
- ❑ Verifiable (compliance to principles can be verified)
- ❑ Easily digestible
- ❑ Followed and emphasized in the organization

- ❑ Each principle has a rationale section; the business benefits and reasoning for establishing the principle is documented.
- ❑ For each principle, the implications of when the principle is to be applied is also listed. More than one situation of when the principle is to be applied is listed.

IT Vision and Mission Statement

- ❑ There are at least 3 Data guiding principles present.
- ❑ For each Data guiding principle, the principle is named and the details of the principle is explained.

Recommendations:

- Refer to section 1.4 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.
- Refer to the "IT Vision Mission and Guiding Principles Guide" to assist you to complete.

IT guiding principles example

IT Principle 1: Enterprise value focus

We aim to provide maximum long-term benefits to the enterprise as a whole, while optimizing total costs of ownership and risks.

Rationale

- Solutions must aim to maximize the cumulative business benefits over their entire lifecycle.
- Enterprise priorities are above priorities of a business unit or a project.
- Total cost of ownership is more important than the cost to buy/build alone.
- Risk governance and management are integral elements of the company's operating model.

Implications

- Link all investment proposals to business/data strategy and goals.
- Track and demonstrate business value realization on all major investments.
- Prefer common solutions and shared services that benefit the enterprise over one-off solutions for one business unit.
- Analyze and take into account organizational readiness for adopting new solutions.
- Manage development and operational risks on every project and acquisition.
- Include the total cost of ownership analysis for the proposed solution or solution options for every investment (project or acquisition) proposal.
- Prefer vendor-independent solutions to avoid vendor lock-in and enable competitive sourcing.

IT strategic goals assessment

Gaps and Omissions:

IT Goal Development

- ❑ Each Data goal can be traced back to Data implications developed from the business context.

IT Goal Clarity

- ❑ Each Data goal has a name and a corresponding statement explaining the details of the goal.
- ❑ The Data goal name and explanation is easily understandable by all audiences.

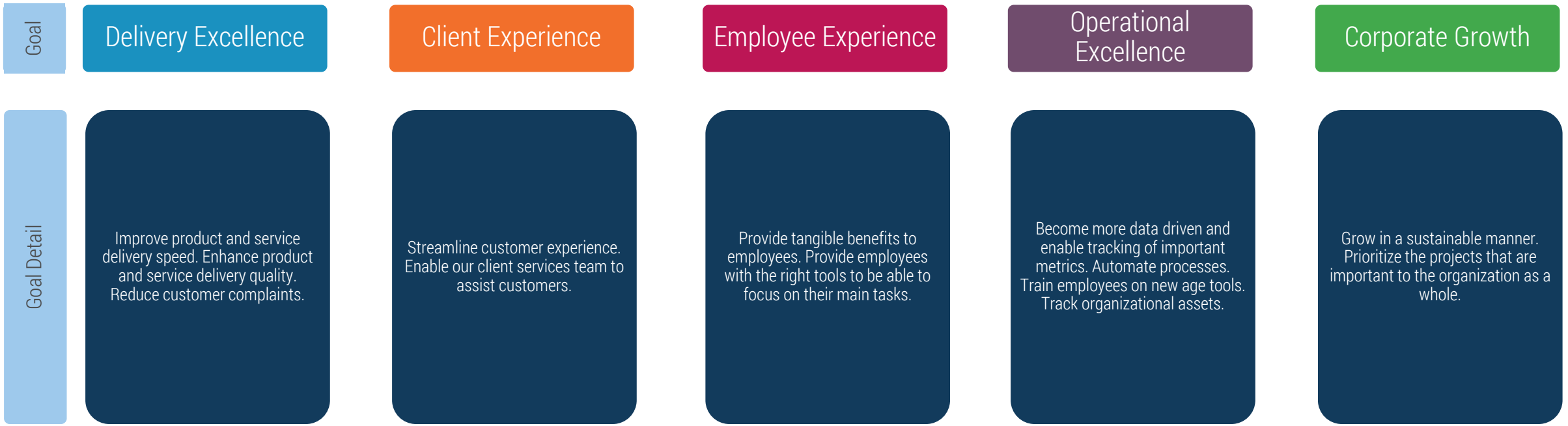
IT Goals

- ❑ There are 3 to 7 Data goals present in the data strategy.

Recommendations:

- Refer to section 1.5 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

IT strategic goals example



IT goal alignment example

Delivery Excellence

Provide predictable and resilient systems, services and solutions.

Client Experience

Create seamless end-to-end interactions that drive value and satisfaction.

Employee Experience

Foster a culture that succeeds through communication, execution and leading by example.

Operational Excellence

Promote an organization built on continuous improvement and adaptability.

Corporate Growth

Deliver solutions, systems and data that focus on delivering value.

Data strategy target state maturity assessment

Gaps and Omissions:

Additional Details

- ❑ A timeline is set out as to when Data will achieve the target state maturity.
- ❑ There is a short summary of what Data is lacking in the current state that needs to be improved to reach the target state.

Target State Maturity

- ❑ IT's target state maturity is clearly indicated and a reason is provided to explain why this target state maturity is selected.

IT Maturity Assessment

- ❑ A maturity scale is used to indicate the target state maturity of IT.

Recommendations:

- Refer to section 1.7 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Current data capabilities example

Focus Areas	Detail
Stakeholder Relations	• Significant misalignment with stakeholder regarding, Data budgeting and headcount changes. Will need to improve stakeholder relations process to enhance communication between Data and stakeholders.
Project Management	• Project management and its corresponding components were denoted by both Data and the business as ineffective.
Analytical Capability and Reports, Business Reporting	• There is a desire from the business to consume more reports. Business stakeholders are frustrated by the lack of standard reports and the lack of actionable data.
IT Governance	• Interactions with Data can differ from one person to the next, there is a need for greater consistency in Data processes and services to ensure uniform delivery.
Organization Change Management	• Multiple respondents expressed frustration with the fact that apps were cumbersome to navigate. There is a greater desire to ensure that employees are made away of how applications assist with their tasks and how Data will impact them beforehand.
Security Management	• General dissatisfaction from Data management on the lack of effective security management. Strategy is well planned but unfortunately the execution of the strategy is lacking.
Data Quality	• General consensus between the business and Data is that data quality is poor throughout the organization.
Requirements Gathering	• Many respondents did not know the definition of “requirements gathering”. Those that were clear were frustrated by the process. There is a sentiment that Data does not understand the business units and a desire from some areas employ BRMs (an example was used of how accounting uses business managers).

IT current state maturity assessment

Gaps and Omissions:

Additional Details

- ❑ There is a short summary of what Data is lacking in the current state that needs to be improved on to reach the target state.

Current State Maturity

- ❑ IT's current state maturity is clearly indicated and a reason is provided for why this current state maturity is selected.

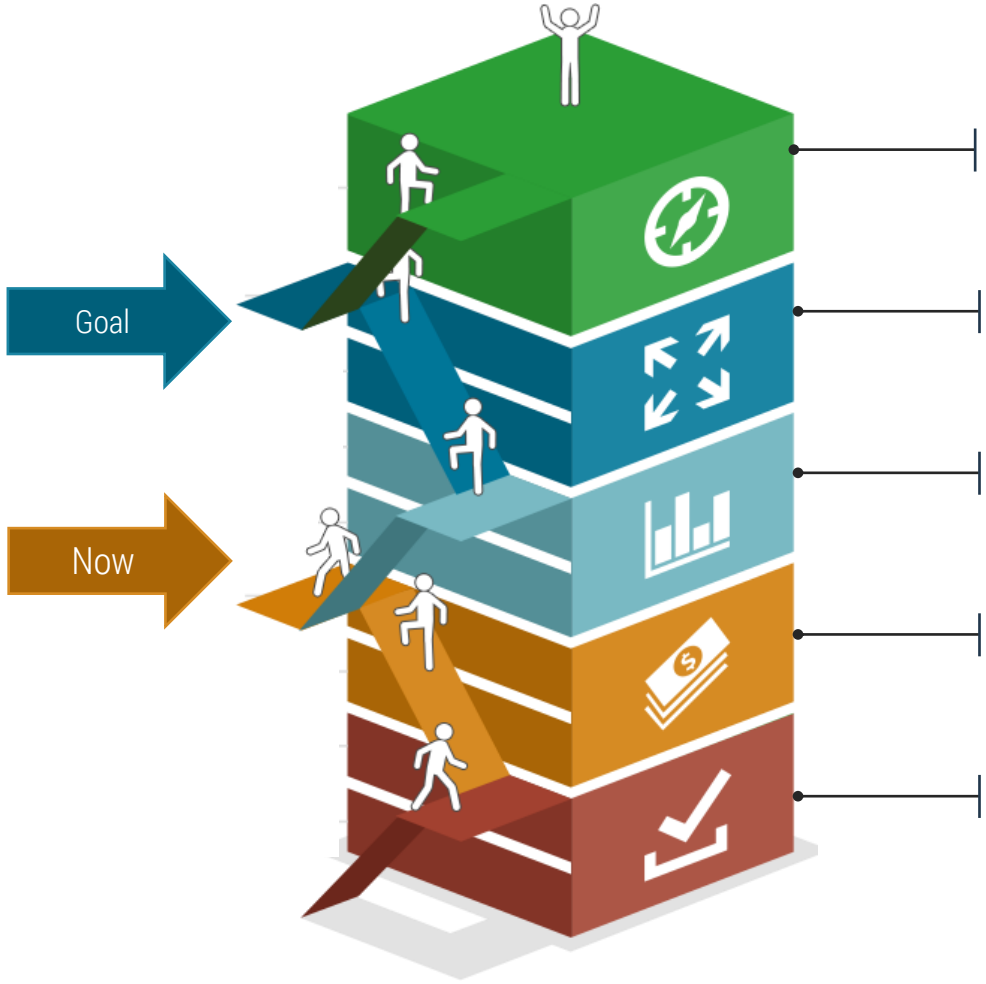
IT Maturity Assessment

- ❑ A maturity scale is used for measuring the current level of Data maturity.

Recommendations:

- Refer to section 2.7 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.

Current data maturity example



Innovator - Transforms the Business
Reliable Technology **Innovation**

Business Partner - Expands the Business
Effective Execution on Business **Projects**, Strategic Use of **Analytics** and **Customer Technology**

Trusted Operator - Optimizes the Business
Effective Fulfillment of **Work Orders**, Functional **Business Applications**, and Reliable **Data Quality**

Firefighter - Supports the Business
Reliable **Infrastructure** and Data **Service Desk**

Unstable - Struggles to Support
Inability to Provide Reliable Business Services

IT initiative prioritization assessment

Gaps and Omissions:

Prioritization Quality

- ❑ There are at least 20 Data initiatives that are prioritized using the method outlined in the data strategy.
- ❑ The priority of each Data initiative can be easily explained by the data team.

Prioritization Criteria Clarity

- ❑ There are clear criteria laid out for prioritizing Data initiatives.
- ❑ There at least two criteria used to prioritize Data initiatives.

IT Initiative Prioritization

- ❑ A method of prioritizing data initiatives is evident in the data strategy.

Recommendations:

- Refer to section 3.10 in the blueprint Rapidly Develop a Data Strategy for instructions on how to complete.
- Refer to the "L-M-H initiative Prioritization Tool" to assist you with prioritization.