Tratech Consulting

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BACKGROUND, GOAL AND INITIAL SET OF QUESTIONS

TRATECH CONSULTING VISION

ANALYSIS AND IMPLEMENTATION OF THE PROJECT:

        - exploration

        - definition and monitoring

        - communication

        - execution

        - analysis, report, recommendations

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BRIEF:

- as a new Data Analyst, a client has asked you to go into their business to support them in the **migration of their legacy inventory management system to a new, integrated SaaS product**

- you need to present to senior stakeholders how you would approach:
  - the analysis and implementation of the project
  - what aspects of data analytics you think would be necessary to achieve the best results – this should include clear justifications.

PROJECT GOAL: present a full overview of the migration project (legacy system to SaaS), with rationale and justifications behind each part to achieve most efficient results

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Data Analysis Consultancy

"Are you looking to implement a new solution that requires the migration of data between your legacy system and a new system?"
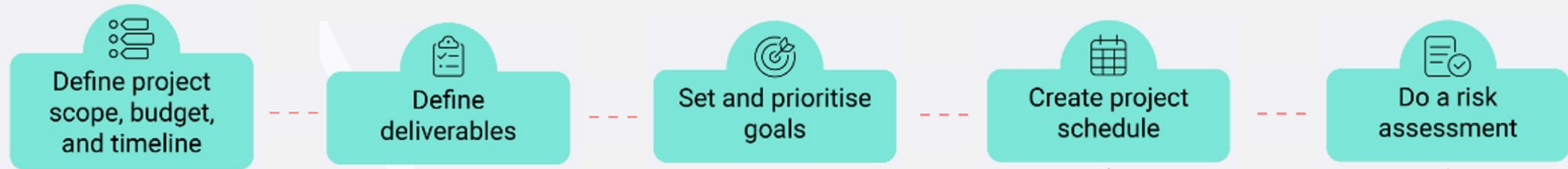
TRATECH KEY PROJECT POINTS

- "Rubbish In, Rubbish Out" **(not to bring across any out of date or redundant data)**

- Extract, Transform, Load (ETL) processes for some of the biggest retailers in the world **(prepared to manipulate high volume of data)**

- Accurate data extraction, data cleansing and automating ways of importing (**all processes mapped out with buffer prepared to encounter challenges)**

- **Aim: to tell compelling stories with data, empowering organisational leaders to make better, more informed decisions.**

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Identify all stakeholders

Define roles and responsibilities

Hold a kick-off meeting

- What inventory management systems is the client using at the moment?

- What departments are currently accessing/managing the legacy data?

- Does the client have an specific target SaaS in mind?

- Specific deadline for the migration to be completed?

- Key contact people for this project

- What does the client define as "project success"?

- What is the current state of original legacy data:
  - channels/platforms where the original data is stored/managed?
  - size and integrity state of the total data to migrate?

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Analysis and implementation of the project: definition and monitoring

| Define project scope, budget, and timeline | --- | Define deliverables | --- | Set and prioritise goals | --- | Create project schedule | --- | Do a risk assessment |

- The previous exploration phase questions would give clarity on the scope to define a budget and draft a timeline

- Agile mindset - iterative process on SCRUM framework

- Fully understand deliverables (SaaS migration complete, project report) + desired features to set and define goals (Sprints, tasks and subtasks)

- Create project schedule and necessary documentation (Jira + Confluence) with regular meetings with client

- Create Risk Management Plan (identification-response-log)

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INTERNALLY:

- Being clear, concise

- Working with Tratech Directors to refine and redefine together the final steps and approach to follow

- Humility, ability to truly listen and hunger to learn

EXTERNALLY:

- Unified and solid vision for the client

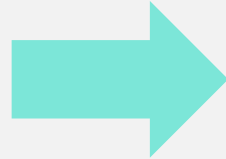- **Excellence in customer experience must be at the heart of every communication**

Communicate project plan

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Analysis and implementation of the project: execution

Extract

– SQL or NoSQL servers

– CRM and ERP systems

– Flat files

– Email

– Web pages

Transform

80%
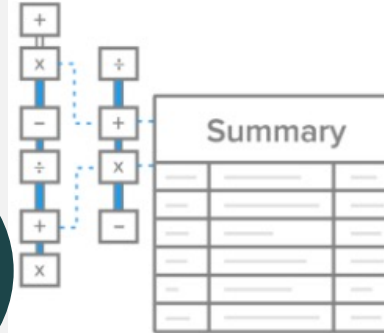
Summary		

– Filtering, cleansing, de-duplicating, validating, and authenticating the data.

– Performing calculations, translations, or summarizations based on the raw data. This can include changing row and column headers for consistency, converting currencies or other units of measurement, editing text strings, and more.

– Conducting audits to ensure data quality and compliance

– Removing, encrypting, or protecting data governed by industry or governmental regulators

– Formatting the data into tables or joined tables to match the schema of the target data warehouse.
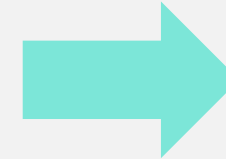
Load

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Analyze

- From Tratech website: **"aim of data analysis is to discover useful information that the organisation can use to improve processes and increase business"**

- On that purpose, after the execution of the migration, the key aspects of data analytics that would inform the project report:
  - **Descriptive analytics:** "what happened" (data findings on legacy data during Transformation process)
  - **Diagnostic analytics:** "why it happened" (exploration on the reasons for our findings)
  - **Predictive analytics:** "what might happen" (now that the migration has been completed, this will give a picture on future on the new SaaS)
  - **Prescriptive analytics:** "what shall we do next" (informing the 'Recommendations' part of the report for optimal course of action and best results)

- **Tools: Excel, Tableau, Python, SQL, R**

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Thank you!