

the answer's in  
the data. **simple.**

# Strategy Week 4

Summer School 2024

## Setting the Data Strategy

One of the most difficult tasks for a new CDO is developing a Data Strategy while the organisation continues to operate "Business as Usual" (BAU) - using and abusing data, continuing bad habits around data and usually with a lack of governance and planning.

Changing anything in 'Business as Usual' has been likened to performing open heart surgery on a runner while they are in the middle of a marathon. In reality, it is more like patching them up, giving them water to keep going and a clear map to get them to the end of the race!

And so, what is the context of BAU? In most cases it will be:

- A legacy data environment: silos of data; multiple records; duplicates; weak data governance; no useful metadata; no Master Data Management; heavy management information and no Business Intelligence.
- Legacy systems: burning platforms - the crisis that means you have to change; bespoke developments that are hard to maintain and manage; reporting systems remote from users; no true data management systems.
- Legacy business processes: that have evolved over time; are limited by the technologies and the data available at the point in time; and contain many work arounds.
- Multiple suppliers: of software and systems.
- Legacy IT department: focused on building stuff rather than delivering and supporting Software-as-a-Service; internal networks as opposed to cloud; perhaps even a 'distant' IT Managed Service partner that may be operating to a traditional IT contract, with little time for "data".
- Legacy 'transformation' process: based on project governance and waterfall whilst struggling with agile development and innovation, (or the more useful blend of the two); not able to adapt from a technology-driven transformation to a data-driven transformation.

A number of these points overlap and it is worth spending the time to dig a little deeper to understand the context. Some of this may be recognisable.

The most immediate data threat or risk lies in ongoing projects or programmes within the business. It is likely that within the existing project governance, there is lack of data design authority. It is also worth spending time to review closed or recently delivered projects. Don't forget to look for opportunities too, gems of projects that need their profile raising.

A close look at the project documentation, the outcomes, the business value delivered and, any actions that were passed into BAU at the end of the project, will quickly provide an assessment of the maturity of the data influence in the existing project governance and framework.

Often the tell-tale signs of poor data influence are:

- There was little consideration given to data migration until the later stages of a project.
- There was a lack of discussion about the extraction, transformation and loading of data.
- There is a lack of evidence of proper tooling involved in the project.
- There is a lack of data governance in the project.

It is also interesting and worthwhile to understand which function is currently making the decisions about data in the project. Is it someone in IT? Is it the technical design authority? Is it a project manager or a business analyst? Is it the systems/applications owners who are affected by the project? Is it no-one?

## Existing Processes

One of the biggest tasks for the new CDO is the step into this project process and taking control of the data. This will require good communications and a huge amount of credibility, especially if senior sponsorship for the CDO is not visible in this level of detail, or if the senior sponsorship does not understand this level of detail.

In some cases, it will be too late. The projects delivered in the recent history before the arrival of the CDO will be leaving a vapour trail of data issues. These will need to be picked up, and data governance and data quality quickly addressed. Start where the pain is and where the business value will be the greatest, and the quickest, to deliver.

To focus the attention of senior sponsors on the current state of the 'data nation', it may be worth researching and reviewing how much time per person is spent on reporting, and the number of reports produced. This is a strong business case for the CDO to approach the rationalisation of reporting and data management for reporting, without having to delve into any data quality issues that will be present (it is easier to make a financial business case than a data quality business case, however you can solve both problems simultaneously).

The next big task for the new CDO is how to steer through this bubbling cauldron and deliver a data strategy.

Previously we have suggested that a data strategy is made up of two concurrent tracks: the Immediate Data Strategy (IDS) and the Target Data Strategy (TDS). We have now recast this into three tracks which also incorporates the Urgent Data Strategy; dealing with the firefighting issues that you will be facing and trying to stop the problems getting worse. You can then move forward with your immediate and target strategies.

## The Immediate Data Strategy

The first part of the data strategy will focus on an Immediate Data Strategy (IDS). The IDS is the tactical approach to deliver support for BAU, gain quick wins and temporary fixes, and prepare for the second part of the data strategy.

A piece of advice: don't call the tactical deliveries 'projects'. Instead, refer to them as 'initiatives'. Projects make people think of charts and a lot of time and resource spent on project management. Initiatives might engender a more agile approach.

The impact of the IDS is the "quick" delivery of incremental value to the organisation through its data, avoiding the hype cycle, (more on that in another class), on its way.

Here is an example of what the six core elements of an Immediate Data Strategy could be:

1. Stability and rationalisation of the existing data environment
2. Data culture and governance
3. Existing and immediate data and IT development initiatives
4. Data exploitation and integration
5. Data performance, quality, integrity, assurance and provenance
6. Data security (such as the General Data Protection Regulation (GDPR))

The IDS should try to deliver high-profile, quick wins based on the organisation's data pains. The CDO should use the IDS to show the 'art of the possible' to a data-illiterate organisation, illustrating how the business will transform with the new data possibilities. The organisation will be looking for results and therefore it is important to set realistic goals and manage expectations. There should be proof of concepts, feasibility studies and data science initiatives. The tactical initiatives of the IDS should help build the story, show the vision and sow the seeds for the Target Data Strategy.

## The Target Data Strategy

The second part of the data strategy will focus on the Target Data Strategy (TDS): this is the strategic approach.

The new CDO cannot sit back and deliver the TDS over a two to three-year window. Once the IDS is in play, the CDO needs to be preparing the organisation for the changes that are coming with the implementation of the TDS.

The CDO should ensure that they:

- Use internal communication to sell the vision: do not allow a vacuum to form.
- Seek every opportunity to communicate the vision: do not be frightened of becoming a data bore, think cheerleader instead.

- Socialise the data vision and the change that could be coming, especially the controversial ideas.
- Locate the data champions to support the data vision and the CDO.
- Engage the organisation's leadership and find senior sponsors: they will be crucial.
- Can explain the vision, strategy and goals: if you can't explain it, you're doing something wrong.
- Win hearts and minds: often a logical argument or business case is not enough to win the day – use your storytelling to the max.

How does a CDO put these 'rules' into practice?

It may be worth establishing a Special Weapons and Tactics (SWAT) team to address the Immediate Data Strategy. The words in SWAT actually sum it up very well. The weapons used, the data tooling, may not be the tools that will make up the more strategic data arsenal, and the approach used will be very tactical and not strategic.

For example, the CDO may select what might be called 'lightweight tools' for addressing Extract, Transform and Load process, data storage, and data quality. These may be Software-as-a-Service tools and cloud-based storage, to reduce the dependency on IT resources and to operate in a more agile environment and approach. If you have the resources, you can operate two teams: a SWAT team to focus on the IDS and a more transformational team to deliver the TDS, with the CDO maintaining strategic alignment between the two.

## Key points for your strategy

Nothing is an exact science when it comes to writing your strategy however there are some guidelines to think about:

- Your data strategy must underpin your organisations overarching strategy
- Use the points in our maturity model to check yourself, have your thought about all 11 elements (11 because this is part of the strategy exercise and it doesn't count itself!)
- Do not create war and peace, it should be succinct, however you often have a larger number of artifacts in your strategy that you condense when you are presenting it to stakeholders
- Include an articulation of what good looks like and include metrics where you can
- Make sure it sounds like you!

## Homework

- What is your main firefighting issue to tackle?
- What would you put in your Immediate Data Strategy?
- What would you put in your Target Data Strategy?

## Program Content

*This is the content for the 10-week program:*

### **Week 1 - Guest Speaker Aaron Wilkerson**

**Understanding the different types of CDO and what kind are you**

### **Week 2 –To be joined by Scott Taylor**

**Making the case for the CDO and business case development**

**Guest Speaker: Scott Taylor** Telling Your Data Story With the 3Vs: Vocabulary, Voice, and Vision

### **Week 3 - Guest Speaker**

**Planning for your first 100 days and beyond and The Carruthers and Jackson Data Maturity Assessment Overview**

### **Week 4**

**Strategy Development part 1 PURPOSE**

### **Week 5 - Our Sponsor MicroStrategy will be joining the session.**

**Strategy Development part 2 PURPOSE**

### **Week 6 - Our Sponsor Corndel will be joining the session.**

**The role of People**

### **Week 7 - Our Sponsor Praesto will be joining the session.**

**Methodology**

### **Week 8 - Our Sponsor One Data Will be joining the session**

**TOOLS**

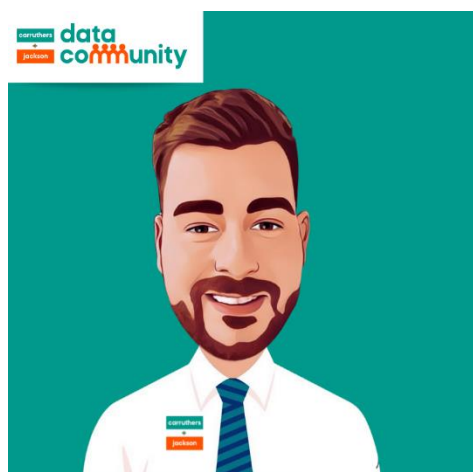
### **Week 9 To be joined by Kate Strachnyi**

**Building your team**

### **Week 10 - Our Sponsor Microstrategy will be joining the session.**

**Disruption versus innovation**

## The Summer School Community



**If you need assistance at any time, please contact your community manager [s.toseland@carruthersandjackson.com](mailto:s.toseland@carruthersandjackson.com)**

As a participant of Summer School, you have joined a community of current and aspiring CDOs, where you will gain practical advice, proven methodologies and guidance to put back into the business straight away. Your homework as you progress through the course will build a series of artifacts for you to use in your organisations.

### Exclusive Community Groups

Within the Pheedloop Platform, there is an area just for you. The Carruthers & Jackson Exhibit Hall. This area will be used to share pre-class work, classroom materials, and homework. You will also be able to catch up on all sessions missed. Sam will share this link with you weekly once we begin.

We have also created a LinkedIn Group. These groups will provide an environment to network and interact with peers. Please check the groups regularly for updates and information or drop in to say hi to your fellow students.

### You can access the Community Page & Groups here:

What's app:

<https://chat.whatsapp.com/CbaFoRn5JO7E596JrKsBKe>

LinkedIn:

<https://www.linkedin.com/groups/13054133/>

*These groups are reserved for the sole use of the Summer School, the school leaders, and participants. Please ensure you remain respectful to other group members, at all times. Any posts that are commercial or deemed unsuitable by the group managers will be removed.*



