ICT Final Round: Experience Mapping + Gap Analysis + STAR Stories

This document provides a comprehensive analysis and strategic narrative based on the provided resume, job description, intelligence briefing, and initial interview transcript. Its purpose is to ensure a consistent, compelling, and data-backed presentation for the final interview panel at Impact Climate Technologies (ICT).

1) EXPERIENCE↔REQUIREMENT MAPPING

This table maps every requirement from the job description to direct evidence from your resume and projects, assessing both the strength of the match and its strategic importance to ICT.

JD Requirement (verbatim)	My Evidence (quote + source)	Match Strength (H/M/L)	Company Priority (Hi/Med/Lo)
Power BI & Data Platform Leadership			
Drive data quality, integrity, and consistency across datasets and platforms.	"Spearheaded ETL operations for a star-schema data warehouse, integrating diverse datasets...ensuring high data accuracy and consistency." (Resume: Turner)	H	**High**
Integrate data from Syspro ERP, Sage, CRM systems, and other sources into unified dashboards.	"Proven success unifying financial, CRM, and operational data across multiple systems (SAP HANA, Snowflake, AWS)." (Resume: Summary)	H	**High**
Develop scalable data models and visualizations for executive and operational reporting.	"Developed and optimized Power BI dashboards centralizing operational metrics like revenue trends and inventory turnover." (Resume: Trulieve)	H	**High**
Analytics & Reporting Strategy			
Ensure timely and accurate reporting	"Created automated end-to-end reporting	H	**High**

across business units (finance, operations, sales).	pipelines with Python, SAP HANA, and AWS...ensuring consistently reliable and precise data." (Resume: Trulieve)		
Ensure consistency in the KPIs and metrics across our different business units.	"I built those out using the source data from SAP HANA...pulling that into Power BI and modeling it." (Interview Transcript)	M	High
Partner with finance and operations to deliver insights on revenue, margin, operational efficiency, and customer trends.	"Partnered with marketing, operations, and executive teams to translate insights into actionable strategies." (Resume: Trulieve)	H	High
Lead efforts to automate reporting and reduce reliance on manual Excel processes.	"Eliminated manual processes, saving 10+ hours weekly...Reduced manual reporting by 50%." (Resume: Trulieve)	H	High
Team & Stakeholder Collaboration			
Work with 8 Presidents across our portfolio companies to ensure we provide pertinent reporting and dashboards.	"Partnered with...executive teams to translate insights into actionable strategies." (Resume: Trulieve)	M	High
Work cross-functionally with IT, finance, and sales teams to define reporting needs.	"Collaborated with stakeholders to define and translate business requirements into scalable, data-driven BI solutions." (Resume: Turner)	H	Medium
Translate business questions into	"Requirements gathering. Just kind of like asking leading	H	High

data-driven solutions and dashboards.	questions...making sure that there's value in the ask." (Interview Transcript)		
Required Skills & Qualifications			
5+ years of experience in BI, analytics, or financial reporting roles.	Experience from July 2018 - Present (7+ years). (Resume)	H	**High**
Very strong Excel skills.	"Excel (Advanced)" (Resume: Skills)	H	**Medium**
SQL, Power BI, Power Query, DAX, Snowflake.	All listed explicitly under Skills. "I've been working with Snowflake since 2018." (Resume, Interview Transcript)	H	**High**
Experience with designing and building a data analytics strategy with Financial and CRM systems.	"Proven success unifying financial, CRM, and operational data across multiple systems." (Resume: Summary)	H	**High**
Proven track record of building enterprise analytics in a high-growth environment.	"building scalable BI infrastructures...in high-growth and acquisition-heavy environments." (Resume: Summary, referencing Trulieve)	H	**High**
Excellent communication and stakeholder engagement skills.	Overall Score: 91/100. "Ability to create genuine rapport with Bob while demonstrating technical expertise was masterful." (Interview Performance Assessment)	H	**High**
Exposure to private equity-backed environments and M&A integration.	"Adept at working hands-on and leading technical direction in private equity-backed, fast-paced organizations." (Resume:	H	**High**

	Summary, referencing Trulieve)		
Preferred Attributes			
Experience with Syspro ERP and Bidtracer CRM data integration.	No direct experience listed. Experience with SAP HANA, Salesforce, and unifying disparate systems is adjacent. (Resume)	L	Low
HVAC or industrial services experience.	No direct experience listed. Supply chain at Home Depot and manufacturing-adjacent roles are related. (Resume)	L	Low
Comfortable in a fast-paced, evolving organization with multiple acquisitions.	Experience at Trulieve, a PE-backed company in a highly regulated and dynamic industry. (Resume, Interview Transcript)	H	High

2) TOP-3 GAP ANALYSIS & MITIGATION

This section addresses the few "Low" matches identified, turning potential weaknesses into demonstrations of adaptability and strategic thinking. *(Note: The 30-day plans below are high-level summaries. A more detailed execution plan is in Section 7.)*

1. Gap: No direct experience with HVAC or industrial services.

- **Bridge:** "While my direct experience isn't in HVAC, my work at Home Depot's supply chain involved analyzing the flow and quality of industrial-grade products, which shares the operational complexity of this industry. Furthermore, my time at Trulieve in a heavily regulated, state-by-state operational environment mirrors the challenge of standardizing analytics across ICT's diverse portfolio of 11 companies."
- **30-Day Plan:** My first 30 days will be an immersion into the business. I'll meet with portfolio company presidents to understand their specific models and KPIs, like the quote-to-close ratio, and build a prototype dashboard to demonstrate rapid learning and value delivery.
- **Confidence Statement:** "I am confident in my ability to quickly master the specific KPIs of the HVAC industry by applying my proven framework for entering complex business domains, engaging stakeholders, and delivering value through data."

2. Gap: No hands-on experience with Syspro ERP or Bidtracer CRM.

- **Bridge:** "I haven't used Syspro or Bidtracer directly, but my career has been built on integrating disparate systems. At Trulieve, I built data pipelines from SAP HANA, and at Turner, I integrated multiple vendor and sales systems into a central data warehouse. The fundamental challenge of mapping business processes to data schemas is universal, and I'm adept at learning new systems quickly."

- **30-Day Plan:** In my first month, I will work with Geoffrey and the IT team to perform a deep dive into the Syspro and Bidtracer schemas. My goal is to build and document the first scalable, unified data model in Power BI that joins data from both systems, creating the foundation for all future reporting.
- **Confidence Statement:** "My ability to rapidly master and integrate new data sources like SAP HANA and various CRMs will allow me to quickly get up to speed on Syspro and Bidtracer, ensuring we can build a unified data model without delay."

3. Gap: Formal experience leading a team vs. being a senior individual contributor.

- **Bridge:** "While this is my first role with a 'Manager' title, I've consistently taken on leadership responsibilities. At Turner, I led the technical migration to Snowflake. At Trulieve, I was the primary builder and strategist for the Arizona and Florida Power BI environments, which involved gathering requirements from the CEO and driving adoption. This player-coach role is a natural next step that aligns perfectly with my hands-on leadership style."
- **30-Day Plan:** Within 30 days, I will establish a clear operating rhythm with the team, develop a 90-day analytics roadmap for Bob's approval, and host the first cross-functional data governance meeting to begin the process of standardizing KPIs across the portfolio.
- **Confidence Statement:** "I am prepared to step into this leadership role by applying my experience in leading high-stakes technical projects and managing executive stakeholders to build a collaborative, high-performing analytics function for ICT."

3) SEVEN FULL STAR NARRATIVES

These seven stories are crafted to cover the anticipated questions, demonstrate a range of competencies, and highlight quantified business impact.

STAR 1: Building a BI Platform from the Ground Up

- **Situation:** When I joined Trulieve to support the Arizona operations, the executive team, including the CEO, lacked a centralized, reliable way to view performance. Reporting was a manual, spreadsheet-based process that was slow, error-prone, and couldn't provide the real-time insights needed in the fast-paced, PE-backed cannabis industry.
- **Task:** My primary task was to design, build, and deploy a full suite of Power BI dashboards from scratch. This required integrating data from the SAP HANA ERP, defining critical KPIs with executive leadership, and creating a scalable data model that could eventually be adopted by other state operations.
- **Action:** I initiated a series of requirements-gathering sessions with the CEO and regional VPs to define the most critical metrics, such as revenue trends, inventory turnover, and discount rates. I then architected the data pipeline, using SQL to extract and transform data from SAP HANA. I personally built the data models in Power BI, focusing on performance and scalability. I developed a suite of over 10 executive and operational dashboards and then conducted training sessions to drive user adoption.
- **Result:** The new Power BI suite reduced manual reporting by 50% and saved the team over 10 hours per week. More importantly, it provided real-time visibility that drove a 5% increase in sales and a 15% decrease in stock-outs by enabling faster, data-driven decisions on inventory and promotions.
- **Company Relevance:** This directly addresses Bob's current frustration with the slow Power BI rollout. It proves I can not only manage but personally execute the development of a mission-critical analytics platform from zero, a key need for ICT.
- **Questions Addressed:** Q2 (Change Management), Q4 (Architecture Design), Q5 (Power BI Buildout), Q7 (Stakeholder Engagement)

STAR 2: Pioneering a Critical Data Warehouse Migration

- **Situation:** At Turner Broadcasting in 2018, our business intelligence team was struggling with an

on-premise Microsoft SSRS data pipeline. It was slow, expensive to maintain, and couldn't scale to handle the massive volumes of Nielsen viewing data we needed to analyze. The leadership team had just learned about Snowflake and saw a significant cost-saving opportunity, but no one on the team had ever used it.

- **Task:** I was tasked with leading the technical effort to migrate our entire BI data pipeline from SSRS to the new Snowflake data warehouse. This involved learning a brand-new technology, redesigning our ETL processes, and ensuring a seamless transition with no disruption to reporting.
- **Action:** I immersed myself in Snowflake documentation and became the team's subject matter expert. I redesigned our ETL workflows, writing Python scripts to modernize data ingestion and SQL to transform data efficiently within Snowflake's architecture. I worked closely with data stewards to map the old schema to the new, ensuring data integrity throughout the migration. I managed the project timeline and communicated progress to leadership, successfully decommissioning the old system ahead of schedule.
- **Result:** The migration to Snowflake reduced data processing time by over 30% and significantly lowered our data infrastructure costs. It created a scalable platform that could handle our growing data needs and improved data accessibility for all business stakeholders, reducing report latency by 40%.
- **Company Relevance:** This is a direct and powerful answer to ICT's most critical technical gap: zero internal Snowflake expertise. It positions me as the immediate, proven solution to their stalled data warehouse implementation.
- **Questions Addressed:** Q3 (Team Building), Q4 (Architecture Design), Q6 (Technical Problem Solving)

STAR 3: Driving Profitability with Advanced Customer Segmentation

- **Situation:** At Trulieve, our marketing and sales strategies were broad and not tailored to specific customer behaviors. In a PE-backed environment focused on rapid growth, we were leaving money on the table by not understanding our highest-value customers or identifying those at risk of churning. We had a wealth of transactional data but weren't using it effectively.
- **Task:** I was tasked with leveraging our customer data to create a meaningful segmentation model. The goal was to identify distinct customer personas that would allow for targeted marketing campaigns, improved promotions, and better inventory stocking strategies to increase both customer acquisition and retention.
- **Action:** I took the initiative to apply advanced machine learning techniques to our dataset. Using Python, I cleaned and prepared several years of transaction data from SAP HANA. I then applied K-Means and Hierarchical Clustering algorithms to group customers based on purchasing frequency, basket size, product preferences, and discount sensitivity. I translated these complex models into clear, actionable personas like "High-Value Regulars" and "Discount-Driven Shoppers" and presented the findings to the executive team.
- **Result:** The insights from this segmentation model were directly integrated into marketing and operational strategies. This led to a 12% quarterly improvement in customer acquisition and retention and contributed to a $2.4M revenue uplift. It also helped reduce inventory waste by 20% by aligning store stock with local customer personas.
- **Company Relevance:** Bob has explicitly mentioned customer analytics and margin improvement as a key goal, referencing his success at BlueLinx. This story shows I can replicate and even enhance that type of high-impact analysis using advanced techniques.
- **Questions Addressed:** Q8 (Data-Driven Decision), Q9 (ESG/Advanced Analytics), Q10 (Operational Analytics)

STAR 4: Saving Millions by Automating Supply Chain Analytics

- **Situation:** At The Home Depot, the supply chain team was spending over 20 hours per week manually

tracking and reconciling SKU discrepancies and inventory flow issues in spreadsheets. This manual process was not only inefficient but also led to a high rate of mis-ships, where the wrong product was sent to a store, causing stock-outs and significant costs.

- **Task:** My objective was to automate this entire process. I needed to design and build a solution that would integrate data from our inventory and logistics systems, identify discrepancies automatically, and visualize the data in a way that field teams could use to prevent errors before they happened.
- **Action:** I designed and implemented a series of ETL pipelines using Python and SQL to pull data from our GBQ servers. I automated the logic to identify potential mis-ships and other inventory errors. I then built a suite of interactive Tableau dashboards that provided a near real-time view of inventory flow and highlighted at-risk shipments. To ensure the solution was used, I personally conducted over 50 training sessions for field and operations teams.
- **Result:** This automated solution completely eliminated the manual tracking process, saving the team over 20 hours per week. The dashboards increased data adoption by 30% and, most critically, reduced costly mis-ships by 25%, resulting in a direct cost savings of $3.2 million for the company.
- **Company Relevance:** This demonstrates my ability to tackle complex operational inefficiencies, a core challenge at ICT as they look to standardize processes. The quantified financial impact is exactly the kind of result a PE-backed company values.
- **Questions Addressed:** Q2 (Change Management), Q6 (Technical Problem Solving), Q10 (Operational Analytics)

STAR 5: Unifying a Multi-Entity Business for a Single Source of Truth

- **Situation:** At Trulieve, due to heavy state-by-state regulations, each state operation functioned as a separate business with its own disparate systems and data definitions. This created significant data silos, making it impossible for the PE-backed executive team to get a unified, enterprise-level view of performance to make strategic capital and operational decisions.
- **Task:** My primary task was to create a single source of truth by integrating data from these various state-level systems into our central SAP HANA database. The goal was to establish standardized, enterprise-wide KPIs and provide leadership with a consistent way to compare performance across all markets.
- **Action:** I designed and led the data unification strategy. I began by working with stakeholders in each state to map their unique data schemas and document their business logic. I then architected and built a series of robust ETL pipelines using Python and SQL to extract, transform, and load the disparate data into a standardized star-schema model within SAP HANA. This process required significant data cleansing, normalization, and the creation of a master data dictionary to ensure metrics were truly comparable.
- **Result:** This initiative successfully created the first-ever unified data asset for the company, providing a holistic view of the entire business. This was the foundation that enabled enterprise-level Power BI dashboards, which reduced manual reporting by 50% and allowed leadership to accurately compare performance across different states, leading to more effective strategies and resource allocation.
- **Company Relevance:** This experience is a direct parallel to ICT's challenge of unifying data across 11 portfolio companies with different systems like Syspro and Sage. It proves I can handle the technical and stakeholder complexity of creating a single source of truth in a multi-entity environment.
- **Questions Addressed:** Q1 (KPI Reconciliation), Q7 (Stakeholder Engagement), Q11 (Why ICT/Model Fit)

STAR 6: Automating Executive Reporting Under High Pressure

- **Situation:** During my time at Trulieve, the CEO had a very specific, daily email report he relied on, which was being compiled manually. The process was fragile, time-consuming, and because of the CEO's direct involvement and exacting formatting requirements, the stakes were incredibly high. Any error or

delay was immediately visible at the highest level.

- **Task:** I was given the direct ask from the CEO to fully automate this mission-critical report. I needed to build a robust, end-to-end data pipeline that was 100% reliable, pulled data from multiple sources including SAP HANA, and delivered a perfectly formatted report every single morning without any human intervention.
- **Action:** I architected a serverless solution using the AWS ecosystem. I wrote Python scripts for AWS Lambda to execute the SQL queries against SAP HANA. I used S3 for staging the data, API Gateway to trigger the process, and the Simple Email Service (SES) to construct and send the final, formatted email. I implemented comprehensive error handling and logging to ensure the pipeline was resilient and auditable.
- **Result:** I successfully created a fully automated, end-to-end reporting pipeline that delivered the CEO's report flawlessly every day. This automation saved the company an estimated $520,000 annually in labor costs and opportunity cost of senior analyst time. It also eliminated the risk of human error in a highly visible executive report.
- **Company Relevance:** This showcases my ability to handle high-pressure requests from senior leadership and deliver robust, end-to-end technical solutions. It demonstrates expertise in automation and the AWS stack, which is highly relevant to building a modern data platform.
- **Questions Addressed:** Q4 (Architecture Design), Q6 (Technical Problem Solving), Q12 (Collaboration/Setting Standards)

STAR 7: Driving Change and Adoption for a New Analytics Culture

- **Situation:** When the new supply chain dashboards were rolled out at Home Depot, initial adoption by the field teams was low. They were accustomed to their spreadsheets and comfortable with the old way of doing things. Without adoption, the $3.2M in potential savings from the project was at risk because the data wasn't being used to make decisions.
- **Task:** My responsibility was to drive the change management effort to move the teams from spreadsheet-only reporting to our new governed Tableau dashboards. The goal was to increase adoption by at least 30% and ensure the new tools became embedded in their daily workflow.
- **Action:** I developed a comprehensive enablement plan. I didn't just send out a link; I conducted over 50 hands-on training sessions, both in-person and virtual, tailored to the specific needs of different user groups. I created a library of support documentation and video tutorials. Crucially, I identified "champions" within the field teams who could provide peer support and I actively solicited feedback to make iterative improvements to the dashboards based on user needs.
- **Result:** This focused change management effort was highly successful. We increased dashboard adoption by 30% within three months, surpassing our initial goal. The dashboards became the primary tool for inventory management, which was the key factor that unlocked the 25% reduction in mis-ships and the associated $3.2M in savings.
- **Company Relevance:** ICT needs to transform from a "handshake company" to a data-driven one. This requires more than just building tools; it requires driving cultural change. This story proves I have the skills and experience to manage that transition and ensure the technology delivers its full business value.
- **Questions Addressed:** Q1 (KPI Reconciliation), Q2 (Change Management), Q3 (Team Building/Maturing), Q7 (Stakeholder Engagement)

4) INTEGRITY SCAN

This scan verifies the consistency of all quantified claims across the provided documents.

Claim	Source 1 (Resume)	Source 2 (Interview Perf. Assess.)	Discrepancy?	Resolution	Status
Trulieve manual process savings	"saving 10+ hours weekly"	N/A	No	Use "10+ hours weekly"	✅ Verified
Trulieve reporting time reduction	"Reduced manual reporting by 50%"	"50% reporting time reduction"	No	Use "50% reporting time reduction"	✅ Verified
Trulieve customer acq/retention	"Improved customer acquisition and retention by 12% quarterly"	"12% customer acquisition improvement"	No	Use "12% customer acquisition improvement"	✅ Verified
Trulieve inventory waste reduction	"reduced inventory waste by 20%"	N/A	No	Use "20% inventory waste reduction"	✅ Verified
Trulieve sales increase	"driving a 5% increase in sales"	N/A	No	Use "5% increase in sales"	✅ Verified
Trulieve stock-out decrease	"a 15% decrease in stock-outs"	N/A	No	Use "15% decrease in stock-outs"	✅ Verified
Trulieve automation savings ($)	N/A	"$520K saved"	Yes	The assessment doc provides a quantified business value. Use this number.	✅ Resolved
Trulieve ML segmentation impact ($)	N/A	"$2.4M from ML segmentation"	Yes	The assessment doc provides a quantified business value. Use this number.	✅ Resolved

Home Depot manual effort reduction	"reducing manual effort by 80%"	N/A	No	Use "80% manual effort reduction"	✅ Verified
Home Depot mis-ship reduction	"reducing mis-ships by 25%"	"25% mis-ship reduction"	No	Use "25% mis-ship reduction"	✅ Verified
Home Depot time savings	"saving 20+ hours weekly"	N/A	No	Use "20+ hours weekly"	✅ Verified
Home Depot dashboard adoption	"increasing dashboard adoption by 30%"	N/A	No	Use "30% dashboard adoption"	✅ Verified
Home Depot savings ($)	N/A	"$3.2M saved"	Yes	The assessment doc provides a quantified business value. Use this number.	✅ Resolved
Turner ETL processing time reduction	"reducing processing time by 30%"	N/A	No	Use "30% processing time reduction"	✅ Verified
Turner reporting latency reduction	"Reduced reporting latency by 40%"	N/A	No	Use "40% reporting latency reduction"	✅ Verified

5) METRICS LEDGER

This ledger extracts and details every key metric from the STAR stories for quick reference and validation.

STAR#	Metric/KPI	Value	Source Line (Document)	Calculation Method	Business Impact
1	Manual Reporting Reduction	50%	Resume: Trulieve	(Old Time - New Time) / Old Time	Increased analyst capacity for value-add work.

1	Sales Increase	5%	Resume: Trulieve	(New Sales - Old Sales) / Old Sales	Direct top-line revenue growth.
1	Stock-out Decrease	15%	Resume: Trulieve	(Old Stockouts - New Stockouts) / Old Stockouts	Improved customer satisfaction and prevented lost sales.
2	Report Latency Reduction	40%	Resume: Turner	(Old Latency - New Latency) / Old Latency	Faster access to data for decision-making.
2	Data Processing Time Reduction	30%	Resume: Turner	(Old Time - New Time) / Old Time	Increased efficiency of data infrastructure, lower costs.
3	Customer Acquisition/Retention	12%	Resume: Trulieve	Q/Q growth rate post-implementation	Increased market share and customer lifetime value.
3	Revenue Uplift (ML)	$2.4M	Interview Perf. Assess.	Attributed revenue from targeted campaigns	Direct, high-value impact on top-line revenue.
3	Inventory Waste Reduction	20%	Resume: Trulieve	(Old Waste - New Waste) / Old Waste	Improved margin and profitability.
4	Mis-ship Reduction	25%	Resume: Home Depot	(Old Rate - New Rate) / Old Rate	Reduced logistics costs, improved inventory accuracy.
4	Cost Savings (Mis-ships)	$3.2M	Interview Perf. Assess.	(Mis-ships Reduced * Avg Cost per Mis-ship)	Significant, direct impact on bottom-line profit.

4	Dashboard Adoption Increase	30%	Resume: Home Depot	(New Users / Total Users)	Ensured ROI on analytics development, fostered data culture.
5	Manual Reporting Reduction	50%	Resume: Trulieve	(Old Time - New Time) / Old Time	Increased analyst capacity for value-add work.
6	Annual Cost Savings (Automation)	$520K	Interview Perf. Assess.	(Hours Saved * Fully-loaded Analyst Rate)	Freed up senior resources for strategic tasks.

6) ASSUMPTIONS & DEPENDENCIES

These are the key factors required for success in the role, based on the provided intelligence.

Technical Assumptions:

- I will be granted administrative access to the Power BI environment to build and manage workspaces, apps, and data gateways.
- I will have read-access to the production (or a replicated production) environment for Snowflake, Syspro ERP, Sage, and Bidtracer CRM to facilitate data integration and validation.
- The company will provide the necessary licenses for Power BI Pro/Premium and any required connectors for the Talend ETL tool.
- The underlying data in the source systems (ERPs, CRMs) is of sufficient quality to support reliable reporting, or there is a willingness to invest in data quality initiatives if needed.

Organizational Assumptions:

- There is executive sponsorship from Bob Toupin to enforce standardized KPI definitions across the 11 portfolio companies, even if there is initial resistance from company presidents.
- The 8 portfolio company presidents and their teams will be available and willing to participate in requirements gathering and dashboard validation sessions.
- I will have the autonomy to define the technical roadmap for the BI platform, in alignment with the strategic goals set by Bob Toupin.
- The current Power BI contractor (Mickey Williams) will be collaborative in transitioning knowledge and receptive to new standards and development practices.

Risk Factors:

- **Change Management Resistance:** The portfolio companies are used to operating independently. A push for standardized KPIs could be perceived as a loss of autonomy, leading to slow adoption or pushback.
- **Data Quality & Debt:** The source systems may contain inconsistent or poor-quality data ("hospitals" vs "health care"). The effort required to clean and normalize this data may be larger than anticipated, delaying the delivery of unified reports.
- **Contractor Dynamics:** The existing Power BI contractor has been underperforming. This could indicate unclear requirements, technical challenges, or a resistance to collaboration, which could complicate the

transition and acceleration of the project.

- **PE Urgency vs. Foundational Work:** The high-expectation PE environment will demand quick wins, which may conflict with the need to do the foundational (but slower) work of building a scalable, governed data platform correctly.

7) DETAILED 30-60-90 DAY PLAN

Theme: Execute with speed and precision to deliver immediate value while building a scalable foundation.

Phase 1: First 30 Days - Discover, Stabilize, and Deliver a Quick Win

- **Primary Goal:** Absorb all critical information, stabilize the existing Power BI implementation, establish key relationships, and deliver a high-impact "quick win" dashboard to build credibility and momentum.

Week	Key Actions & Deliverables
Week 1: Onboard & Assess	- **Meet the Team:** Formal onboarding with Bob, Geoffrey, and Mickey. Establish communication cadence and working agreements. Clarify roles and responsibilities for the Power BI project. - **System Immersion:** Gain read-access to Snowflake, Power BI, Syspro, and Sage. Conduct initial data profiling and review existing data models and contractor work. - **Stakeholder Introduction:** Introductory meetings with 2-3 key portfolio company presidents to understand their most urgent pain points and reporting needs.
Week 2: Stabilize & Strategize	- **Power BI Triage:** Identify and fix the most critical issues in the current Power BI reports to improve performance and accuracy. Take ownership of the development pipeline from the contractor. - **Roadmap Draft:** Develop a draft 90-day analytics roadmap, outlining key priorities (KPI standardization, Quote-to-Close analysis, etc.) and present to Bob for feedback and alignment. - **Technology Deep Dive:** Work with Geoffrey to fully understand the data schemas of the primary ERP and CRM systems.
Week 3: The Quick Win - Quote-to-Close Dashboard	- **Data Model Build:** Build a dedicated, optimized Power BI data model integrating data from Bidtracer (CRM) and Syspro/Sage (ERP) focused specifically on the quoting process. - **Dashboard Development:** Develop a V1 "Quote-to-Close Analysis" dashboard for a pilot portfolio company. Visualize the funnel, win/loss reasons, and cycle times. - **Initial Feedback Session:** Present the

	V1 dashboard to the pilot company president and Bob to gather feedback and demonstrate rapid value delivery.
Week 4: Refine & Plan for Scale	- **Iterate on V1:** Incorporate feedback into the Quote-to-Close dashboard, creating a V2 that is ready for wider rollout. - **KPI Governance Kick-off:** Schedule and facilitate the first KPI standardization workshop with a cross-functional group of stakeholders from finance and operations. - **Document & Share:** Document the data model and logic for the V1 dashboard. Present a formal "First 30 Days" summary to Bob, highlighting progress, key findings, and the plan for the next 30 days.

Phase 2: Days 31-60 - Build, Standardize, and Drive Adoption

- **Primary Goal:** Expand the foundational data platform, standardize core enterprise KPIs, and begin rolling out governed, self-service analytics tools to drive user adoption.

Week	Key Actions & Deliverables
Weeks 5-6: Snowflake Foundation & KPI Standardization	- **Snowflake Development:** Begin building the first curated data marts in Snowflake, leveraging my migration experience. Focus on creating clean, governed tables for Sales, Finance, and Operations. - **KPI Dictionary V1:** Finalize and get sign-off on the first set of standardized enterprise KPIs (e.g., Gross Margin, Customer Acquisition Cost) from the governance committee. - **Rollout Quote-to-Close:** Roll out the refined Quote-to-Close dashboard to 3-4 additional portfolio companies, providing training and support.
Weeks 7-8: Enterprise Dashboard Suite V1	- **Executive Dashboard Build:** Develop the first version of the "ICT Enterprise Dashboard" in Power BI, using the new Snowflake data marts and standardized KPIs. This dashboard will provide a consolidated view across all portfolio companies. - **Adoption & Training:** Launch a formal Power BI adoption program. Conduct the first "Analytics Office Hours" and share training materials to foster a self-service culture. - **Feedback Loop:** Implement a formal feedback mechanism (e.g., a Teams channel, survey) for all new dashboards to continuously gather user requirements.

Phase 3: Days 61-90 - Scale, Optimize, and Deliver Advanced Insights

- **Primary Goal:** Optimize the data architecture, scale the analytics offerings across the enterprise, and transition from descriptive reporting to delivering predictive and advanced analytics.

Week	Key Actions & Deliverables
Weeks 9-10: Automation & Optimization	- **Automate Data Pipelines:** Fully automate the ETL/ELT pipelines from source systems into Snowflake and Power BI, eliminating all remaining manual data prep processes and ensuring data is refreshed reliably. - **Performance Tuning:** Optimize the performance of all production dashboards, ensuring a fast and reliable user experience to maintain high engagement. - **Platform Governance:** Finalize and document the Power BI governance model, including security roles, workspace management, and content promotion processes.
Weeks 11-12: Advanced Analytics - Customer Segmentation	- **Launch Advanced Analytics Project:** Kick off the first advanced analytics initiative: a customer segmentation project modeled after the success at BlueLinx and Trulieve. - **Present 90-Day Review & Future Roadmap:** Deliver a comprehensive 90-day review to Bob and the executive team. Showcase the new dashboards, adoption metrics, and quantified business impact. Present a strategic roadmap for the next 6-12 months, including plans for predictive analytics and further operational optimization.