

Data & Analytics Strategy Proposal

For National Railroad Passenger Corporation (Amtrak)

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Executive Summary

Our team is excited to present this proposal to help Amtrak evolve its data, analytics, and AI capabilities over the next 3-5 years. Our purpose is to enable data-informed decision-making across business lines, driving customer excellence, operational safety, and financial performance. Leveraging agile methodology and industry best practices, our approach adapts core tasks laid out in the RFP while introducing flexible elements that promote collaboration, rapid feedback loops, and innovative outcomes.

Understanding of Amtrak's Needs

Business and IT Vision

- **Amtrak's Mission:** Deliver a safe, on-time, and customer-centric rail experience.
- **IT Strategy:** Support secure and cost-effective solutions that align with the business vision.
- **Data Analytics Goals:** Transition from a fragmented data infrastructure to a unified, advanced analytics platform that leverages AI/ML for predictive insights and process automation.

Key Objectives

- Establish a shared understanding of business challenges and opportunities.
 - Assess current state analytics capabilities and identify gaps.
 - Define a future state vision supported by guiding principles, goals, and key business cases.
 - Develop a comprehensive roadmap with actionable insights, metrics, and communication plans.
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Proposed Approach & Methodology

Our proposed methodology is structured to align with the RFP deliverables while allowing room for creative and iterative exploration:

Kick-Off & Work Planning

- **Initial Meetings:** Within 5 business days of contract start, our team will host a virtual kick-off meeting with Amtrak's key stakeholders. We will present a high-level approach, success metrics, and preliminary milestones.
- **Draft Work Plan:** A detailed draft outlining major activities—including stakeholder surveys, interviews, and group sessions—will be delivered within the first 10 business days.

Current State Fact-Finding

- **Artifact Review & Interviews:** We will review existing data artifacts and conduct up to 20 facilitated sessions with strategy team members and advisers. These sessions will help validate current pain points and map out strategic opportunities.
- **Analysis Report:** The current state analysis will highlight cross-functional pain points and emerging data opportunities aligned to operational and business priorities.

Vision and Guiding Principles

- **Facilitated Visioning Workshops:** Using an iterative approach over 30 business days, we will hold workgroup meetings designed to define the future state. These sessions will capture:
 - Shared data vision across business lines
 - Four key business cases per division
 - Guiding principles and success factors
- **Documentation:** A consolidated vision and outcomes report will be produced, providing clarity on the shared vision, guiding principles, and strategic objectives.

Roadmap Development

- **Strategic Roadmap Sessions:** We will facilitate sessions over a 15 business day period with key stakeholders to:
 - Prioritize business use cases
 - Outline a 3-5 year roadmap that spans people, processes, and technology
 - Define key performance measures and metrics for monitoring progress
- **Feedback & Iteration:** Our approach allows for iterative review cycles to refine the roadmap based on stakeholder feedback.

Final Strategy Document & Communication

- **Final Strategy Draft:** Following iterative reviews (up to three iterations and 16 hours of editing support), we will finalize the comprehensive strategy document.
 - **Communication Materials:** We will prepare an executive summary, detailed stakeholder presentations, and a one-page flyer for broader communication. Change management recommendations and an after-action review session will be incorporated.
 - **Delivery:** The finalized materials will be delivered in a polished, easy-to-disseminate format suitable for board-level discussions and departmental rollouts.
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Key Deliverables

1. **Proposed Approach Presentation:** Delivered within 5 business days post-contract kickoff.
 2. **Detailed Work Plan:** Outlining methodological tools, meeting cadences, and communication vehicles.
 3. **Current State Analysis Report:** Highlighting pain points, stakeholder insights, and strategic themes.
 4. **Shared Data & Analytics Vision Document:** Including guiding principles, future state objectives, and key business cases.
 5. **3-5 Year Roadmap:** A prioritized initiative plan with defined metrics and monitoring framework.
 6. **Final Strategy Document & Communication Package:** Comprehensive strategy report alongside executive-level presentations and communication collateral.
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Timeline & Milestones

Milestone	Timeline
Kick-Off Meeting & Initial Approach Presentation	Within 5 business days of contract start
Draft Work Plan Submission	Within 10 business days
Current State Fact-Finding & Analysis Sessions	Over a 25 business day period
Visioning Workshops & Future State Documentation	Over a 30 business day period
Roadmap Development Sessions	Conducted over 15 business days
Final Strategy Documentation & Communication	Finalized within 2 weeks following roadmap case alignment
Overall Project Duration	5 months (with flexibility for iterative inputs)

Note: While our timeline aligns closely with the RFP requirements, our approach is flexible to accommodate feedback loops and evolving business needs.

Team & Capabilities

Our multidisciplinary team brings decades of combined experience in data strategy, advanced analytics, IT transformation, and project management. Key strengths include: - **Data & Analytics Expertise:** A proven track record in developing scalable analytics frameworks in complex environments. - **Innovation Management:** Experience in implementing AI/ML solutions that optimize processes and improve customer experiences. - **Change Management & Communication:** The ability to translate technical insights into actionable business outcomes and engaging stakeholder communications. - **Agile Delivery:** Structured yet flexible methodologies ensuring on-time delivery within accelerated timelines.

Each team member is committed to adhering to Amtrak's policies, standards, and ITIL-based service management practices, ensuring a high level of accountability throughout the engagement.

Assumptions and Constraints

Assumptions

- Amtrak IT leadership will sponsor decision-making and provide guidance throughout the engagement.
- Amtrak will grant timely access to key stakeholders and necessary data/information.
- Status updates will be shared regularly by the project leads.
- Alignment with Amtrak's IT policies, standards, and guidelines is a given.
- Integration with the Information Security function is expected (with the assessment being out-of-scope).

Constraints

- Certain key stakeholders may have limited availability due to competing priorities and an accelerated timeline.
 - The five-month overall timeline may require prioritization of critical path deliverables over less time-sensitive items.
 - Integration with ongoing IT managed services and concurrent projects will require coordination with existing operational teams.
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Conclusion & Next Steps

Conclusion

Our proposed approach is designed to address Amtrak's current challenges with a flexible yet structured methodology. By leveraging intensive fact-finding, iterative visioning workshops, and agile roadmap development sessions, we will deliver a state-of-the-art data, analytics, and AI strategy that aligns with Amtrak's long-term goals. Our team understands the importance of a unified approach that not