Data Strategy for Planning and Insight

- **Recap from Key Note – 'How We Do Analytics'**

- **Our Framework to Data Strategy**

- **Case Study – with a key 'Harry Potter' Moment...**

- **What Next...**

- **QA**

The Modular
Analytics Co.
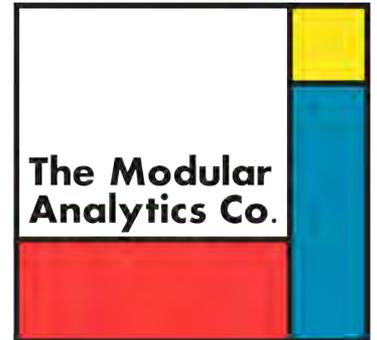
DATA / INSIGHT / ANAYLTICS – WHO TO ASK?

EVERYBODY RAISE ONE ARM – DROP IT WHEN YOU ARE STARTING TO FEEL UNCOMFORTABLE?

MACHINE LEARNING / AI

MANAGING DATA PROJECTS

DATA VISUALISATION TOOL

REGRESSION TESTING

HYPERPOLARIZATION
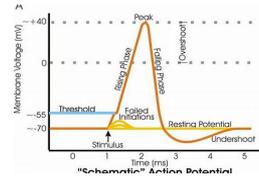
BREXIT

DATA REQUIREMENTS GATHERING

DATA LAKE

NEURAL NETWORKS

DATA DRIVEN TRANSFORMATION PROGRAMMES

SPEECH / TEXT ANALYTICS

NEXT BEST ACTION
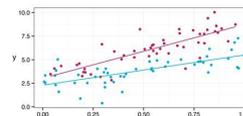
STATISTICAL MODELLING

WHAT YOU DON'T CONTROL

IT

Software

Budgets

WHAT YOU DO CONTROL

VALUE MINDSET PACE

WHERE IS YOUR DATA TODAY?

1   **SILO'D DATA**

EXCEL   TXT

ACCESS   .BAK

CSV   API'S
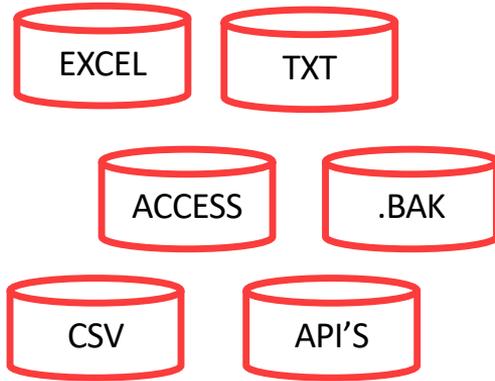
DATA SCATTERED AND
DIFFICULT TO TALK TO
EACH OTHER

2   **DATA LAKE**

EXCEL   TXT

ACCESS   .BAK
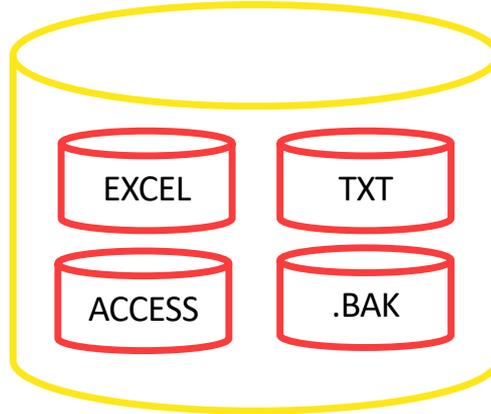
ACCESSIBLE THROUGH A SYSTEM
BUT VERY RAW AND
UNSTRUCTURED

3   **DATA MART**

STRUCTURED DATA TO MEET
THE BUSINESS NEEDS –
EASILY ACCESABLE

WHAT'S THE DIFFERENCE?

DATA LAKE
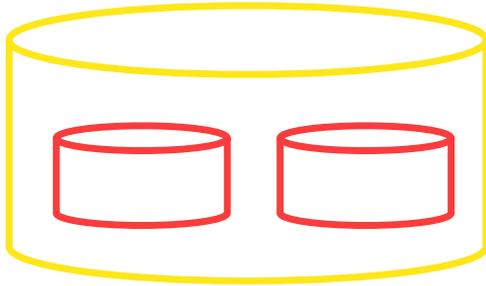
V

DATA MART

- *A **data lake** is a system or repository of **data** stored in its natural/raw format*
- *A **data lake** is usually a single store of all enterprise **data** including raw copies of source system **data** and transformed **data** used for tasks such as reporting, visualization, advanced analytics and machine learning.*

- *A **data mart** is the access layer of the **data** warehouse environment that is used to get **data** out to the users.*
- *The **data mart** is a subset of the **data** warehouse and is usually oriented to a specific business line or team.*
- *Whereas **data** warehouses have an enterprise-wide depth, the information in **data** marts pertains to a single department.*

HOW DO YOU GET THERE?

Here is the standard framework we use when working with clients to make their data accessible and well-connected

Data Mart created

Automate
1. Once the process is working to the way the business requires – automate the process (using tools like Python)

Data Cataloguing
1. Easy way to know what is in the lake
2. Each data source we need to know – Dates / time, volume, min and max records
3. Create a data dictionary for data in the lake

Data Lake created

PLAN
1. Data Sources – What's in / out of scope
2. Types of Data Platforms – Connectors to excel and different to access
3. Infrastructure – What does your platform look like (Cloud / On Prem, Space)
4. What's the Desired Outcome

5

4

3

2

1

Data Mastering
1. Take raw data from lake and start to manipulate it into Data Marts so they are in a more usable format based on business outcomes
2. Join up data sources
3. Create meaningful variables
4. Data Mart Dictionary

INJEST DATA
1. Building the connectors to the platforms
2. Load the data in to the lake

GROUP DISCUSSION

We'd like you to stop for 5 minutes and consider a few things, on your table…….

Use an example that's close to you – operational, planning, CX or QA data

1. Where are you on this journey / what challenges have you faced?

2. How long do you think this process would take for you to go on

3. How much do you think it would cost your organisation to get there? Resources and tools?

Is anyone willing to share their own journey to date?
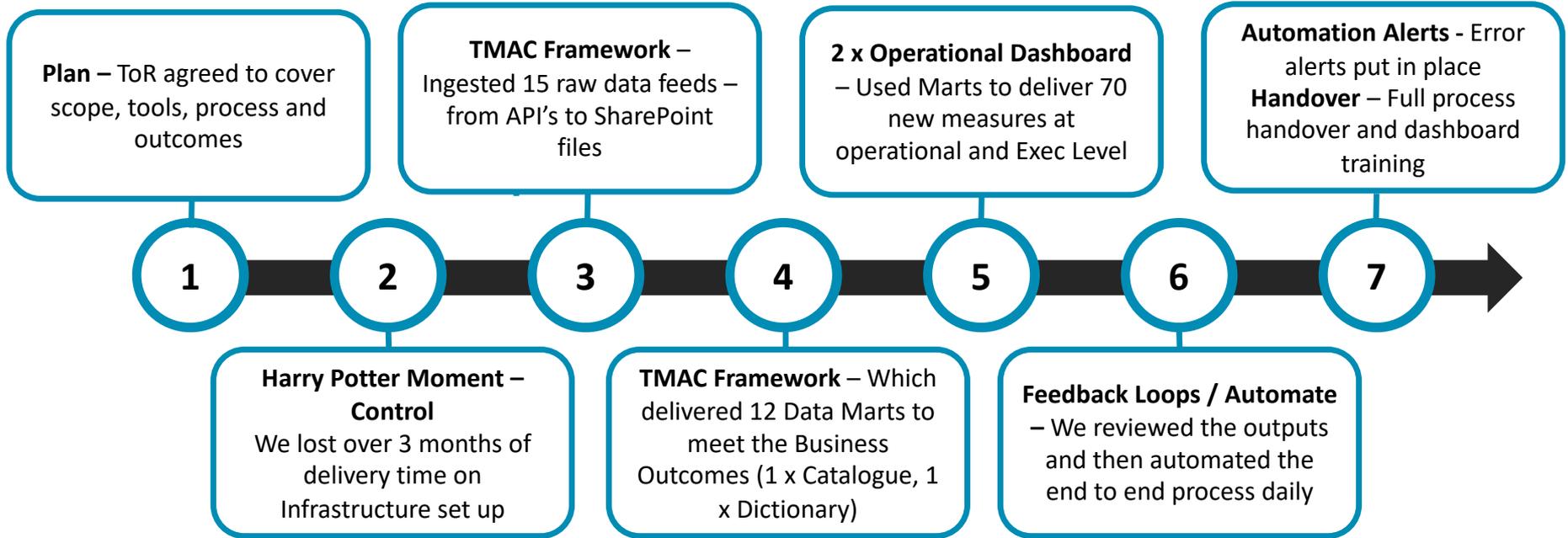
CASE STUDY

CLIENT
Through an Outsourcing Partner - for a UK based Home Insurance company

BACKGROUND
- The Client had not had Reporting or Insight for 9 months.

- The data they had was not fit for purpose to support the operational teams developing performance

- Management / exec level couldn't see the overall performance of the business.

- Data set up was the main driver for this current state.

CASE STUDY

THE JOURNEY WE WENT ON……

Plan – ToR agreed to cover scope, tools, process and outcomes

TMAC Framework – Ingested 15 raw data feeds – from API's to SharePoint files

2 x Operational Dashboard – Used Marts to deliver 70 new measures at operational and Exec Level

Automation Alerts - Error alerts put in place **Handover** – Full process handover and dashboard training

1 **2** **3** **4** **5** **6** **7**

Harry Potter Moment – Control
We lost over 3 months of delivery time on Infrastructure set up

TMAC Framework – Which delivered 12 Data Marts to meet the Business Outcomes (1 x Catalogue, 1 x Dictionary)

Feedback Loops / Automate – We reviewed the outputs and then automated the end to end process daily

CASE STUDY

The project goal was to:

- build a fit for purpose and resilient data infrastructure

- improve the quality and accuracy of data

- provide a single-sourced and fully catalogued data & reporting repository

- build future capability to provide efficient and value-based operational and customer insight and analytics by the consolidation of all data
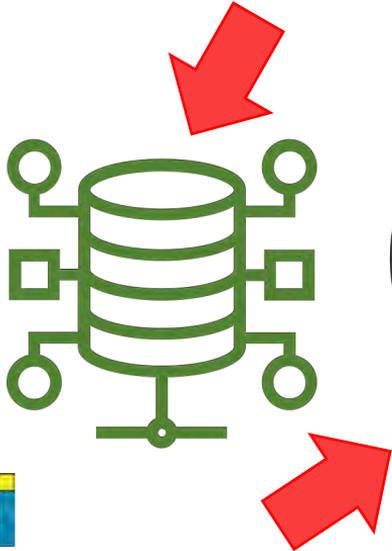
HOW LONG DID THIS TAKE?

END TO END – 4 MONTHS
(3 WEEKS FROM HARRY POTTER MOMENT)

HOW MUCH DID IT COST?

£40,000
(£25,000 IF THEY'D USED TMAC CLOUD INFRASTRUCTURE)

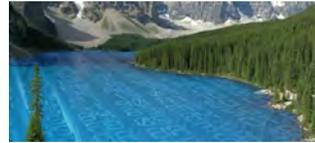# So what is stopping you…….

WHAT NEXT?

YOU

DATA VISUALISATION TOOL

REGRESSION TESTING
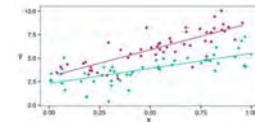
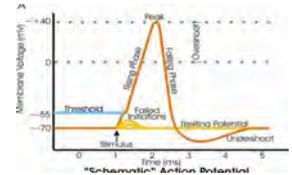**MACHINE LEARNING / AI**

DATA LAKE

NEURAL NETWORKS

BREXIT

NEXT BEST ACTION

STATISTICAL MODELLING

HYPERPOLARIZATION

RECAP

1. **VALUE**

2. **MINDSET**

3. **PACE**

The Forum
Raising Standards in
Customer Operations

Get Connected
Working together in a digital age

Thank you

Data Strategy for Planning
and Insight
Jimmy Hosang & Sean Northam

in #ForumConf

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