Delivering a High-Functioning, Strategic Analytics Team

Rusty Rahmer

Vanguard – Head of Enterprise Digital Intelligence

Digital Strategy and Operations

- Started Vanguard 1998
- 18 Years of Operational Leadership
- 11 Years of Digital Strategy and UX
- 6 Years Digital Intelligence Program Leadership
- Board of Directors for the Digital Analytics Association
- BA Liberal Arts and History



About Me

Vanguard - Head of Enterprise Digital Intelligence

Digital Intelligence

Responsible for elevating the maturity of data driven decision making across the enterprise

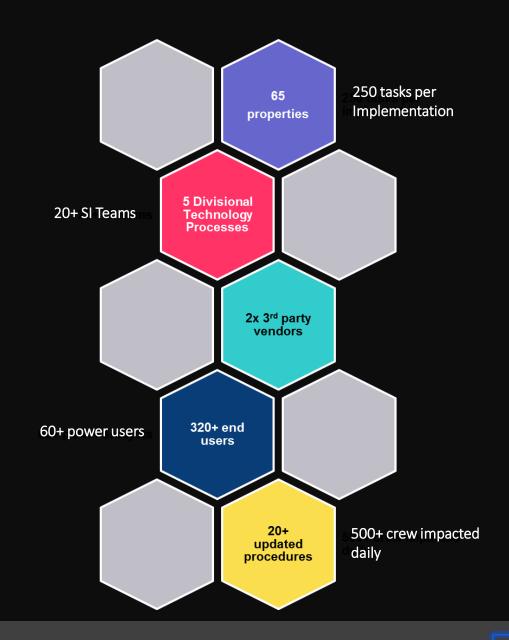
Initial Scope of Opportunity

- Digital Analytics Strategy, Role, and Priority
- Technology Evaluate, Procure, Implement, and Train
- Organizational Design, Structure, and Staffing

Digital Intelligence Program

By the numbers

- Launched in May 2014
- 39 Vendor Products Evaluated / 12 Vendor Product Evaluations
- 9 New MarTech Solutions Procured
- 65 Global Digital Properties
- 5 Divisions
- 40 Agile Teams
- 60 Power Users
- 320+ End Users
- Created and filled 40 new digital roles



Digital Intelligence Program

May 2017

- ✓ Executives successfully demanding data
- ✓ Best in class digital analytics and MarTech tools and capabilities
- ✓ 65+ Talented digital analysts and analytics leaders
- \checkmark Active internal and external Community of Practice
- \checkmark Training and development
- \checkmark Job descriptions and compensation structure
- $\checkmark\,$ Career pathing, certification, and credialization







Digital Intelligence Program

Bringing in the new technology and capabilities revealed a new set of challenges in achieving our mission...



Digital Enablement

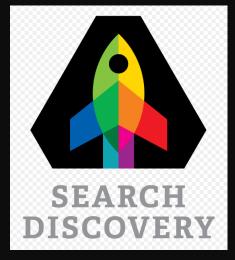
Helping the business evolve around the new modern digital capabilities

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Pivot

- Shift focus from tools and capabilities to practice
- Build an internal analytics practice consultancy to the business
- Develop offer, services, service model
- Seek high value opportunities to mature business and deliver sustainable solutions

Building and Internal Consultancy



Vision of maturity



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Maturity Assessments

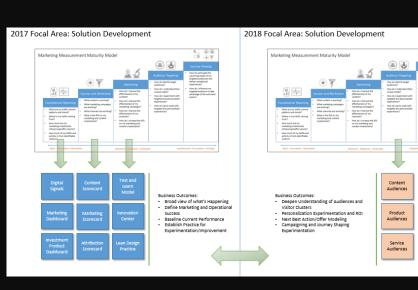
- Conducted with each business line
- Baseline established against executive use cases
- Focus on areas of greatest impact
- Formally revisit semiannually to gauge improvement and value
- Review frequently to gauge success and impact of tactics and solutions

Analytic maturity model focuses on the strength of the business line's analytical decision making

Maturity				Framework
	CHALLENGED	SUFFICIENT	PROFICIENT	IMPORTANCE
DECISION MAKING & STRATEGY	 No concrete understanding of why or how analytics would be applied Analytic insight rarely changes business Limited communication with analytics team and support organizations Business line rarely considers the business impact of analytics projects Decision making process rarely employs analytics 	 Limited understanding of why and how to use analytics Analytic insight occasionally changes business Analytics are regularly used Some communication with analytics team Business line sometimes considers business impact of analytics projects Decision making process occasionally employs analytics 	 Leaders have a well-defined, unified understanding of why and how they would use analytics Analytic insight often changes business Leaders proactively use analytics Leaders and analytics team communicate frequently and efficiently Business line always considers how analytic projects impact the business Making decisions with analytics is inescapable 	
ACUMEN & MINDSET	 Business does not understand what data it has Data is highly inaccessible Business line lacks analytic talent to perform basic analysis 	 Business has a rough sense of what data it has, and some processes to manage it Data is somewhat accessible Business line has analytic talent to perform basic analysis but it is either stretched thin or lacking in advanced skills 	 Business knows what data it has and has processes to manage it Data is highly accessible to analysts Business line has analytic talent to meet all its potential needs and understands how to use partnering organizations 	
DATA & TECHNOLOGY	 Workflows are never or rarely automated causing the same work to be repeated Performing ad hoc analysis is slow because data is not integrated well with existing tools Data is highly inconsistent between sources Data or analytics have significant measurement error Business line does not have the right tools to do basic analysis 	 Some regular workflows are automated Performing ad hoc analysis requires some effort to prepare data for analysis but not much Data is occasionally inconsistent in minor ways Data or analytics have measurement error but it is largely insignificant Business line has many but not all the analytic tools it needs for basic and advanced analysis 	 Most regular workflows are sutomated for systematic delivery, and business has good reasons not to automate those that are not automated Data is well integrated with analytic tools for ad hoc analysis Data is highly consistent from one source to the next and remaining inconsistencies are understood Data and analytics have little to no measurement error and that error that does exit is documented Business line has access to all analytics tools required to perform basic and advanced analysis 	

Service Model, Services, and Project Execution





2018 Project Portfolio – CAI Enablement (DI)

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POC = 80% Solution to Business Problem. Tangibly Demonstrates Potential.

Enablement = Delivers Final Solution. Transitions Ownership. Intended to Permanently Change Business Conversation.

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Initial Results

- Solutions were successful in demonstrating what was possible, the power, and the potential
- Great conversations were happening and eyes were opening
- Handoffs were failing to sustain and the business conversations weren't durably changing
- Doubled down on our business analyst training efforts, to no avail
- Business frustrated with inability to get the solutions to generate "actionable insights"
- Still felt right, but not achieving the impact to maturity we were hoping for
- Needed to pivot

Analytics in Action

- Focus on Soft Skills Less training on solutions and more on the engagement with analytics
- Create disciplined, regular engagement with performance and opportunistic data between business owners and analysts
- Teach analysts and analytics leaders how to facilitate the dialogue and channel the conversation and insights into action



Results

- ✓ Greater engagement from the business than ever before
- \checkmark Sustainable business commitment to the conversation
- ✓ Greater adoption and ownership of solutions
- ✓ Break Down Silos Get the right people around the table
- ✓ Visually reinforce good outcomes (Insights into Actions)
- $\checkmark\,$ Demonstrate the interconnection between efforts
- \checkmark Big leap forward in analytics maturity assessments



Congratulations on your PROMOTION



Solving engagement revealed another set of challenges in achieving our mission...



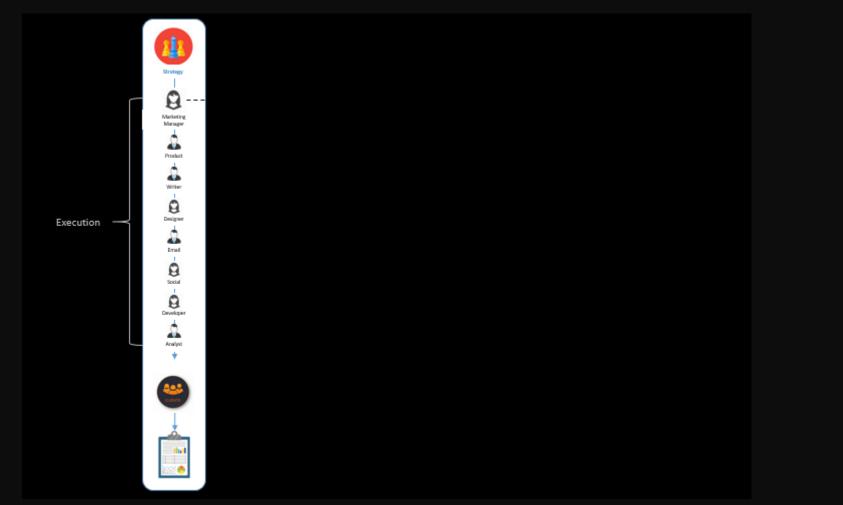
Digital Transformation

Transforming the enterprise for greater digital responsiveness



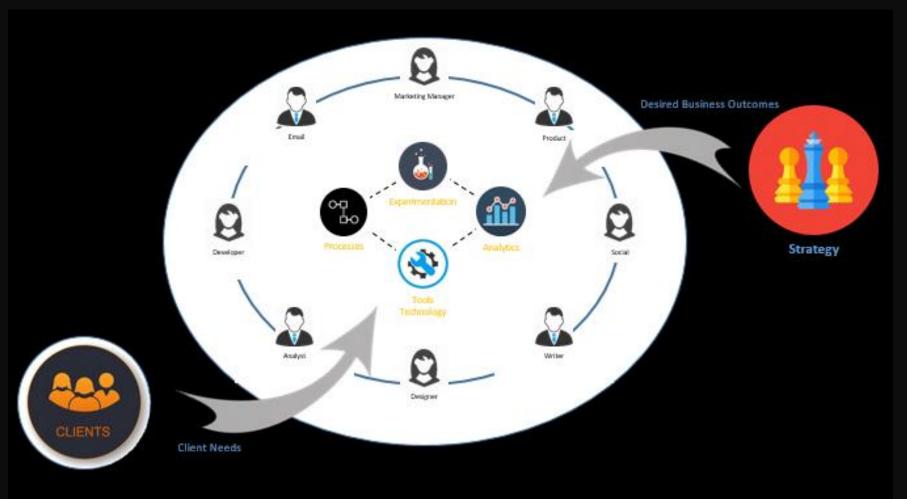
Digital Transformation

Traditional functional organization models...



Digital Transformation

Modern experience, marketing, journey, or product lab model...

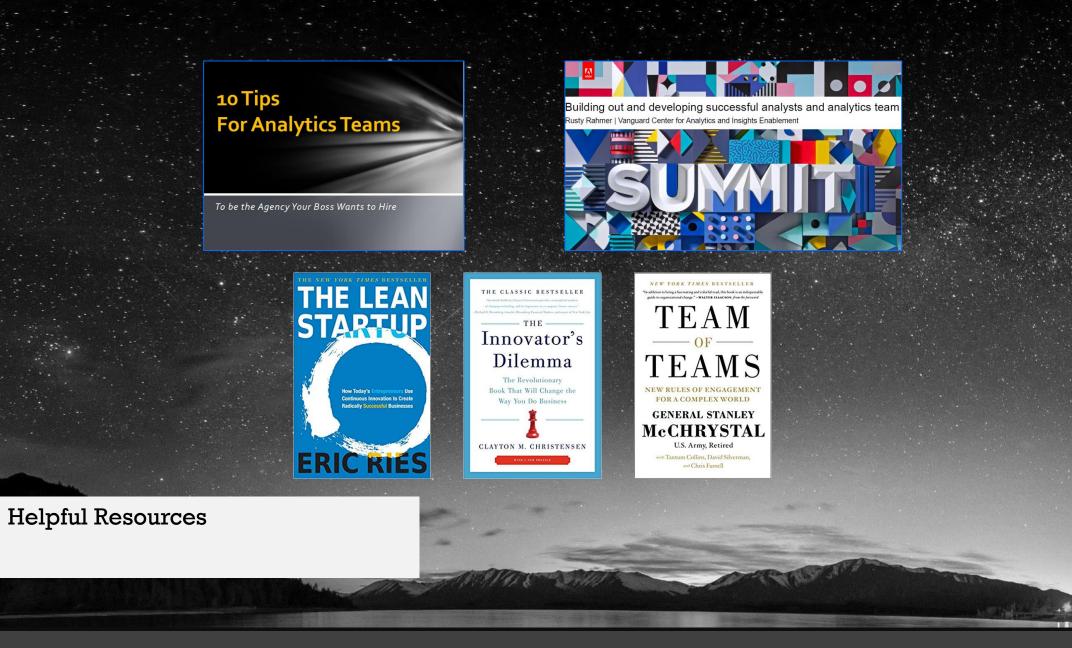


Early Results

- Responsive velocity is great
- Leveraging the best of everyone around the table
- Rapid testing and innovation cycles
- Empowering
- Challenges exist with external processes (i.e. data governance, compliance, etc.)
- Demand for analytics to power innovation is HIGH
- Much more to come...

Key Takeaways

- Create and articulate a relatable vision of business success
- Carefully define your analytic program's measures of success against the vision
- Create a baseline and evaluate/reflect on efforts often
- Account for business culture, soft skills, and organizational design as a core part of your strategy
- Seek to show not tell
- Start small
- Pivots versus refinements
- Sell your wins
- Remember the Alamo LOST



Thank You

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