

Focusing on the right Data/Information to Drive Effective Results

Background

Despite technology advances and enhanced capability to process vast amounts of data at speeds never imagined ten years ago; the availability of meaningful and credible information to aid managers in making day to day decisions remains elusive. Executives at all levels of government cite “lack of reliable, credible data” as a key issue facing the public sector and limiting evidence-based decision making. Generally, information should be accurate (reliably express the phenomenon being measured), objective (not subject to dispute), comprehensible (readily communicated and understood), easy (relatively inexpensive and convenient to compute), and timely (data sources available).

Why is this still a challenge?

Ensuring you have the right information to make decisions and to evaluate the effectiveness of your programs starts all the way back at the departmental planning stage. Planning for “how” you will measure success is just as important as planning for “what” to measure. This means determining the data needed and how and where it will be sourced. Key considerations to bear in mind include: Are the measures for internal management purposes only or will the data be used to support externally published results? What level of accuracy do we need to make our decisions? Can we use preliminary or “flash” data?

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Having a strategic plan in place assists with establishing their annual or in year plans and priorities that ultimately develop into programs. It is at the program level where it is critical that organizations work with operational teams and other departments to determine how success will be measured thus defining data and information requirements as part of the overall program resourcing. Once the program requirements have been identified, funding for all aspects, including data will form part of the plan and budget request. A cost /benefit evaluation should be incorporated as it is the centerpiece of accountability to assist in decision making and the direction the project/program moves to full execution.


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It is important and a must success factor to involve process and department owners early on in the planning process to ensure they have the data needed and are equipped to provide it in the format needed and timeframes required associated with the project plan. Being open to their input and flexible to move in another direction should data not be readily available or prove challenging to capture and report.

These strategies develop into programs and projects which require approvals at the Treasury board level. A department budget is determined by the numerous initiatives and projects that feed into the program which supports the budget. Think of this as a project charter that would dictate the scope of the project and classification of the project. Is it a revenue generating, asset replenishment, infrastructure or a continuous improvement project? Once this is established, the project plan should include key assumptions, major risks & management strategies, a project timeline with key deliverables, as well as resource requirements, impacts and of course financials. Another component of the project would be assessing factors affecting time and effort of these projects/initiatives to be realized through discussion with the operational teams. This is where the identification of these factors and any data/information already available or potential information that requires some modification to systems or reporting, in order to achieve the capturing of the data required.

Automating manual process steps, standardizing processes, eliminating non-value added steps, simplifying business rules and policies, and building in system edits and checks are all key ways to improve your data quality and pave the way for more reliable information.

In addition, to the impacts, a categorization or adoption of a Good, Better, Best approach can be put in place against performance measures and key performance indicators that are identified in the project plan. Perhaps, a dashboard should be developed to track all projects and initiatives associated with the overall program. Moving forward, the inclusion of approved and unapproved projects could be included in the reporting. This approach will help solidify and determine the benefits and drive the project lifecycle to transition and closeout. It will also assist in the ultimate goal to stay within the budget spend approved and allocated at the project/program level.

Focusing on Efficient, Effective and Reliable Processes

While it's always a good time to take stock of your business processes to look for more effective and leaner ways of doing business, even more so to improve the quality of your data. For information to be relevant, timely, and reliable it must be supported by efficient integrated processes, systems and organizational structures. Automating manual process steps, standardizing processes, eliminating non-value added steps, simplifying business rules and policies, and building in system edits and checks are all key ways to improve your data quality and pave the way for more reliable information. Developing business rules over how free-form text fields can be used and using standardized reason codes are easy ways to improve the quality of non-financial information.

We have seen organizations design complex new processes solely to support a data collection request. Before embarking on a large-scale new process design, other avenues should be considered, including offering “proxy data” or outsourcing data collection to third parties who may already have systems in place to collect the data you need. If necessary, process owners should take the time to design sustainable new processes, while ensuring the collection methods do not introduce unnecessary labour intensive tasks or workarounds.

Measuring the process performance (time, cost and quality) of your key or critical processes is always beneficial – not only is it a source of valuable insight on the health and stability of your data and processes; it also facilitates creation of a continuous improvement agenda. In addition, the data, discipline and skills gained from managing performance against key process measures improves data quality.

Data Analytics and Data Management

Data analytics comes in many forms, from the simplistic measurement of results to the advance type of predictive and prescriptive analytics. Identifying the organization needs and focussing on information that drives insights and enable informed decision making is absolutely imperative in determining the most effective data management & analytics framework.

Notwithstanding specific needs, building a data driven organization has key foundational pillars that must be considered in the organizations' overall data management & analytics framework. The sophistication of each of these pillars is determined by the priorities and needs as defined by the business plans and priorities as described above. Once all of the requirements have been identified, departments can determine the level of investment required.

1. Technology Considerations

The key technology decisions can be grouped in the following 3 areas:

- Data Storage and Processing**
- Data Governance & Data Security**
- Business Intelligence tools**

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2. Data Considerations

Determining which data is required to achieve your objectives is important and when making those decisions you will have to consider what are the data **source**, what is the **quality** of the data and lastly the **accessibility** of the data is very important.

3. Capabilities

When assembling, and organizing talent or when building capabilities, it is critical to understand the needs of the business. The spectrum of data analytics can run from basic **descriptive statistics** to **advance analytics, R&D and Innovation**. The capability needs will be defined by the analytical goals the organization is seeking to achieve.

4. Business Process

Having strong processes will yield more effective, reliable results. Data management and analytics should be an integral part of the business Strategy and Planning exercise. All data structures should include project delivery process, with standards and procedures to manage demand and outcomes. Finally, having a data governance model, defined quality controls and data management protocols is imperative.

**If you are interested in learning more about
Focusing on the right Data/Information to Drive Effective Results
please email Heather Buchan at hbuchan@therightdoor.ca.**

Meet our Subject Matter Experts

Juliette Hillock, CPA CGA

Juliette is a financial executive with over 30 years of diverse experience. Over 20 years were spent as a member of senior management of Canada Post both in operational and corporate financial roles.

Juliette's diverse experience includes planning, budgeting, forecasting & reporting, costing, corporate governance as well as, strategic corporate planning. She was a key member of the project team that delivered business transformation at Canada Post gaining process design, improvement and change management skillsets and knowledge she has used and continues to use throughout her career. Her experience also extends to include investment gate keeping, and business case proposals involving complex costing analysis.

Her past eight years have been focussed on working with costing specialists while obtaining extensive knowledge in costing methodologies, contribution reporting, Corporate planning and governance. Over the past three years, she led the development of Canada Post's 5-year Corporate Plan financials and cross functional integration with the Strategy team, subsidiaries and Finance decision support and planners to create the Corporate Strategic Financial Plan for Board of Directors approval and Corporate Plan summary document for submission to Treasury Board. Juliette is a skilled coach, team leader and has superior interpersonal skills, capable of resolving multiple and complex issues while motivating a team to peak performance.

Julie Mills, CPA CA

Julie has over 30 years of professional experience including both consulting and operational experience. She spent 19 years with Canada Post as a member of senior management overseeing financial operations. Over the past 11 years, Julie has provided services in the areas of finance process optimization, shared services implementation and business process improvement. She advises finance executives and other C-suite stakeholders on how to improve productivity and value delivered by finance while optimizing costs.

Her experience includes process improvement, program management, research and benchmarking, resource allocation, financial planning, budgeting and analysis and implementing the CFO model in the public sector. She is a skilled problem solver, team leader and employee coach.

Kim Chicoine

Kim has spent a most of her career with Canada Post Corporation, a large multidimensional & complex crown corporation and acquired experience in many business areas and functional disciplines. In the past 2 years Kim has leveraged her experience in business process improvement, data management & analytics as a consultant to businesses and government agencies.

In her tenure at CPC, Kim participated in some of the Corporation's largest transformation initiatives in the areas of Data Analytics and Digital transformation.

Kim was responsible for the strategy and implementation of the long-term vision of the enterprise wide data assets. She led and managed all aspects of data governance, data technologies, business intelligence and advanced analytics with a focus on driving economic value and business insights for the organization.

As a partner and advisor to the Group President who led the digital transformation of Canada Post, Kim led the Business Operations function of the newly formed organization. She designed and implemented business processes in the areas of performance measurement & management, data management & analytics, planning and investment prioritization, governance, budgeting.



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