

# Becoming a Data-Driven Organization: A Five-Step Process

*by First San Francisco Partners*



VISION



PURPOSE



PICTURE



PLAN



PARTICIPATION



**The very culture of your organization must implicitly and explicitly demand a data-centric environment.**

## The pursuit of data-centricity

A data-driven organization could be described as today's Holy Grail, particularly for Chief Data Officers but also for other members of the C-Suite. By data-driven, this means you: consider data an input, not an output; believe data is an asset that needs to be valued, managed and protected; and your organization invests in and embodies being data-driven (i.e., uses data to drive decisions).

In reality, the pursuit to be data-driven will require change within your organization — and, in many cases, significant change. They won't be your typical procedural changes for a specific department or team; rather, these will require changing the views and beliefs of the entire organization.

Put another way: The very culture of your organization must implicitly and explicitly demand a data-centric environment.

Changing an organization's culture takes time and effort. The process can be complex, and it doesn't happen by announcing, "We have a new culture." It's important to first understand the role of beliefs and behavior and how they impact culture.



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”

## Changing company culture

The most challenging aspect of creating a data-driven organization is adjusting the culture to not just support, but also require data-centricity. The assumptions, beliefs, values and behaviors of every employee make up the organization's culture, and all levels must be included in the transformational efforts.

Whether explicitly defining culture through values and mission statements or allowing implied culture to prevail, all companies eventually learn that creating or changing cultural elements are difficult to control.

***What about your culture?*** Is it defined and framed in a way that allows employees to align with and uphold it? For example, a low-cost provider may wish to express its culture as “we do more with less” rather than emphasize corner-cutting and belt-tightening. But this may be a culture statement that is hard for employees to rally around.

Company culture should be something employees at all levels can own and exemplify — and remember that simplicity is a good thing. If employees can't articulate the culture to others in or outside the organization, they won't be able to live it. Ultimately, if you can't explicitly define your culture in a memorable way, your employees are likely to (re-)define it for you.



## The science behind change

From scientific studies referenced by consultant, speaker and author Dan Barnett in *Make or Break Culture: Get Extraordinary Results From People*, it is clear that an individual's beliefs drive his or her behaviors — and, in turn — directly influence the results of the organizations they are part of.

The idea is that we need to start at the core of what drives us as humans, the limbic system, where behavioral instincts (e.g., “fight or flight”) reside. This is also where activities associated with core beliefs can be found — ideas so deep-seated that responses are instinctual.

The activities of conscious behavior, which lead to results, occur in your neocortex. This area controls higher mental functions, purposeful movement, perception and analysis and behavior — the area that plans, deliberates and decides.

Essentially, there is constant communication between both parts of your brain, which influences your choices. Most of this traffic is calculating risks and rewards. Barnett calls this influence from the limbic system to the neocortex “The Result Force,” since this interaction creates the decision-making that drives the results you want. First, you drive beliefs, then you drive behavior, which creates results. The beliefs and behavior create and drive your company culture. With the right beliefs and behavior, it's easier to get results that are consistent with the company goals.





Vision, Purpose, Picture, Plan and Participation framework adapted from William Bridges' *Managing Transitions: Making the Most of Change*.


\*Enterprise Information Management





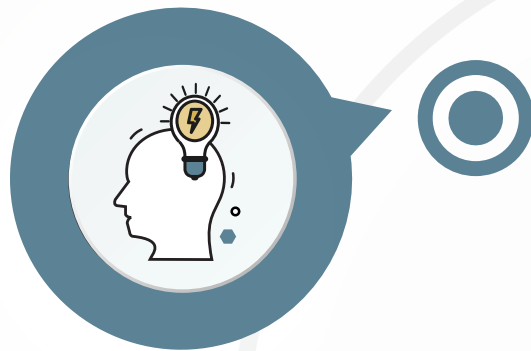
## Five steps to a data-driven organization

Becoming a data-driven organization requires a change to your culture and the beliefs and behaviors of every employee. This five-step process to structure your communication focuses on the importance of inspiring beliefs and behaviors and how to use them to support changes you need to make:

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- **Vision.** A high-level, strategic statement of your goal.
  - **Purpose.** Why you are executing the vision.
  - **Picture.** What future state looks like and the principles for attaining it.
  - **Plan.** How and when you will get to the desired future state.
  - **Participation.** Who is responsible for the needed changes.

This process should align with the scope and priorities of your program. And although your vision, purpose and picture may appear lofty, aspirational and broad, your plan and who is participating will be more specific and tactical.





## Step 1: Vision

Before you move into implementation planning, it is important to create a unified vision or statement of your organization's goal.

Your vision statement should represent the desired future state of your organization and should:

- Be specific and direct
- Inspire beliefs to direct behaviors
- Be high-level in its strategic reach

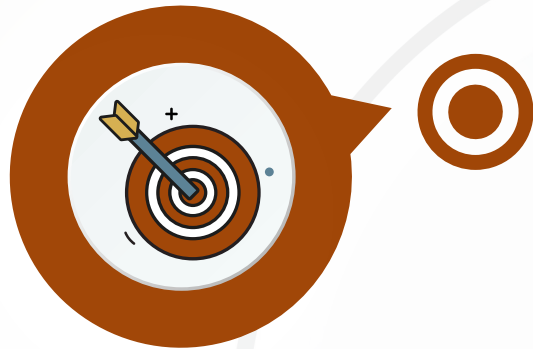
Consider this framework for a vision statement, which is specific and direct — yet still high-level:

**The Data program will \_\_\_\_\_, which will impact the business by \_\_\_\_\_.**

Completed, the vision statement should be succinct and evoke your broader company culture and be benefits-oriented; for example: **AcmeTech's new Data Governance program shores up internal procedures and practices that will reduce costs from bad data and the related error correction payments, saving the company millions.**

Once you establish your information management program's vision statement, it will become a touch stone for inspiring your organization to become data-driven.





## Step 2: Purpose

Next, think about the “why” for your vision statement — the purpose for the goal. Why is it important for your organization to achieve it?

The answer will be personal and unique to your organization and will be broad or specific depending on your current scope.

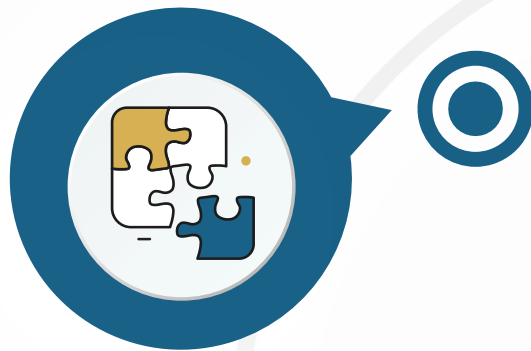
Here are some to get you started:

- It will simplify and improve our quarter-end closing process, which saves us time, money and frustration.
- It will enhance our customer experience, which will lead to less churn and higher customer lifetime value.
- It will make our product line more complete, which makes us more competitive.
- It will complement our digital strategy, which is critical to the growth and long-term success of the organization.

Some purposes — such as “It will comply with legislative requirements, which keeps regulators out of our business” — are inherently less motivational. But it is important to express the beliefs associated with them, because when vision and purpose are aligned, they power you through other steps in this process.







### Step 3: Picture

Vision and purpose are often not enough to inspire alignment within an organization. Employees need to picture what the goal-state will look like in order to support and participate in the change. One way to fully conceptualize the outcome of a change is by contrasting it to the current state.

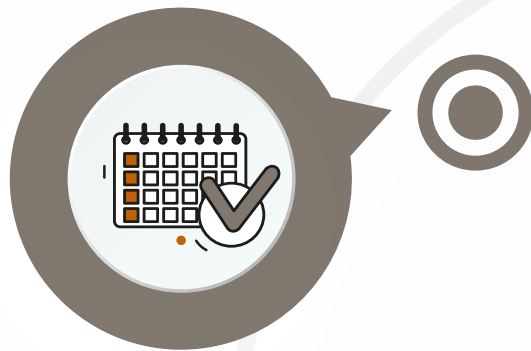
Use specific examples of what will be changing to deepen and strengthen your vision and purpose:

- **Before:** Our data is often a burden, with its inherent issues and challenges.
- **Now:** Our data is a key competitive asset, now that we understand and trust it.
- **Before:** Data is our customer, vendor and product information.
- **Now:** Data is a critical, corporate asset, and I see how it enables decisions to drive growth.

A guiding principle is another way for employees to picture the organization's values through a statement of expected behavior. This example states the behavioral aspects succinctly, followed by further explanation, while supporting the vision and purpose:

**We are accountable for the data we produce. As individuals, we create new data every day. We must make sure it is of the highest quality by following agreed-upon standards and guidelines. This will allow everyone in our organization to trust the data we use.**





## Step 4: Plan

Your vision, purpose and picture will only take you so far; you need a plan to get your organization to its desired future state. It should include details and an implementation timeline that lets employees know when they will receive the information, training and support they need to make the transition.

At a minimum, the plan should include information about:

- What changes are needed (how they support future state)
- What EIM will facilitate (key steps and milestones)
- The enterprise roadmap (a big-picture view)
- Group-specific roadmaps (collaboration that is required)

It is important for managers to understand how their own work will change over time, as well as how their employees' work changes. Remember to communicate the plan to managers in advance, so they are able to evangelize and support your company-wide messages.





## Step 5: Participation

Achieving a data-driven company requires the coordination and collaboration of every employee, team and group across the organization. For the vision to be realized and the plan to be implemented, clear roles and responsibilities are key — so, too, is communicating how individuals and/or groups will work together.

Questions to clarify about participation include:

- What is my specific role, and how will my job change?
- Who does what on my team and/or in the groups with whom we interact?
- What are the related responsibilities across the enterprise?
- What are the assignments specifically within EIM?

When you are specific about what participation is needed and by whom, this collectively helps to move everyone forward.







## Author Kelle O'Neal

Kelle is Founder and CEO of First San Francisco Partners, which celebrated its tenth anniversary in April 2017. A veteran leader and accomplished advisor in the information management sector, as well as a speaker and author, Kelle is passionate about helping organizations apply data and intelligence to gain a true competitive advantage.

### Becoming a Data-Driven Organization: A Five-Step Process

*Becoming data-driven organization takes time.  
With small, key steps, we can help you get there.*



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