Module 1: Data Strategy: Constructing a Corporate Data Strategy

1. What Happens without a Data Strategy?
   a. User Issues / Business Obstacles
   b. New Development Challenges
   c. Business Impact of Using Data
   d. Supporting Multiple Data Initiatives

2. Strategy Fundamentals
   a. Definition
   b. Traditional Strategy Elements
   c. Getting Started
   d. Approach Alternatives: Top/Down or Bottom/Up
   e. Strategy Activities and Outputs
   f. Analysis and Development Work
   g. Strategy Stakeholders

3. Core Components (Identify, Provision, Process, Store, Govern)
   a. Definition and Description
   b. Once Size does not Fit All (the Differences)
   c. Real World Examples
   d. Potential Goals & Objectives
   e. Methods and Practices

4. Analysis Preparation
   a. Aligning with the 3 Stakeholder Audiences
      i. Business Strategy Alignment
      ii. Business Operations Alignment
      iii. Systems and Applications Alignment
   b. Conducting Stakeholder Interviews
      i. Participant Selection
      ii. Developing Questions
      iii. Interview Techniques

5. Analysis Activities
a. Corporate Business Strategy
   i. The Analysis Approach
   ii. Artifact Review (Annual Reports, Plans, Initiatives)
   iii. Conducting Interviews
   iv. Identifying Goals & Objectives
   v. Categorizing the Component Details

b. Business Operations
   i. The Analysis Approach
   ii. Artifact Review (Business Plans, Reports, Project Roadmaps)
   iii. Conducting Interviews
   iv. Identifying Improvement Areas
   v. Documenting Business Usage Scenarios
   vi. Categorizing the Component Details

c. Systems and Applications Alignment
   i. The Analysis Approach
   ii. Artifact Review (requirements, specifications, development documents)
   iii. Conducting Interviews
   iv. Identifying Improvement Areas
   v. Documenting Business Usage Scenarios
   vi. Categorizing the Component Details

6. Packaging the Strategy Details
   a. The Deliverables
   b. Consolidating the Findings
   c. Distill Findings into Goals
   d. Identify Milestones
   e. Building the Roadmap
   f. The Deliverable Document

7. Wrap Up

Module 2: Data Strategy: Building a BI/Analytics Roadmap

1. Today’s Data Environment
   a. Data Source Diversity
   b. Data Usage Variety
c. Expanding User Audience

2. Multiple User Segments and Capabilities
   a. The Data Audience
   b. Different User Types: Standard Query, Ad Hoc, Segmentation, Knowledge Discovery
   c. The Evolution of Data Usage and Delivery
   d. The Data Usage / Data Management Relationship

3. Evolving from Business Intelligence to Analytics to Self Service
   a. Definitions and Concepts
   b. Different Views of Self Service
   c. Data Management Methods
   d. Data Management Tools
   e. Differing User Skills
   f. The Evolution of Self Service
   g. Potential Goals & Objectives
   h. Typical Analytics Evolution

4. Business Intelligence / Analytics Development
   a. Development Activities
   b. Development Methodologies
      i. Waterfall
      ii. Iterative
      iii. Agile
   c. The Data Development Paradigm

5. The Business/Analytics Portfolio
   a. What is an Analytics Portfolio?
   b. Terminology and Concepts
   c. Incremental Delivery of Data, Decision Making, Business Value
   d. The Growth of Data vs Analytics

6. Building the Business/Analytics Portfolio
   a. Scoping the Business and Analytics Need
   b. Strengths of the Portfolio Approach
   c. The Placemat
   d. Placemat Sections and Details
   e. Sample Placemats
f. Ranking and Prioritization
g. Constructing the Analytics Roadmap

7. Data Management – Supporting Self Service
   a. Data Management Defined
   b. Data Management: Traditional vs. Today
   c. 5 Forgotten Properties of Data Management
   d. Supporting Self Service: Data Sources, Staging Data, and Data Usage
   e. Evolving Data Management for Self Service

8. Developing a Self-Service Data Architecture
   a. Identifying an Architecture Based on the Usage Characteristics
   b. The 5 Key Data Usage Characteristics: Audience, Access, Structure, Domain, and Rigor
   c. Using the Data Region Framework
   d. A Usage-based Architecture
      i. Source Onboarding and Source Data Repository
      ii. Data Exploration
      iii. An Enterprise View
      iv. The Sandbox
      v. Reporting and Business Intelligence
      vi. Advanced Analytics

9. Organizational Considerations
   a. Observations about Current Technology Roles
   b. Hidden (and Necessary) Roles & Responsibilities
   c. Data Management & Self-Service Activities
   d. Who Does the Work?
   e. A New Role/Responsibility Structure

10. Moving Forward – Starting Your Effort
    a. No Organizational Reporting
    b. Department / Shadow IT Environment
    c. New Data Warehouse Initiative
    d. Existing BI/DW Environment

11. Wrap Up