Data Maturity

Three Perspectives on Becoming a Data-Informed Organization

Tech Forward

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Karen Graham

DIRECTOR OF EDUCATION & OUTREACH, TECH IMPACT

Karen is a sought-after speaker, trainer, writer, and consultant with expertise in technology leadership and innovation, nonprofit software, and digital strategy. As Tech Impact's Director of Education and Outreach, she leads the Idealware team of researchers, presenters, and writers who create technology information resources designed to help nonprofit leaders put their vision into action.

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Jenn Taylor

PARTNER – INFORMATION SYSTEMS, DEEP WHY DESIGN

Jenn works with mission-driven organizations to identify, understand, and address the pain that occurs when processes, technology, and execution are misaligned with mission, strategy, and expectations. Her current work emphasizes building digital systems within and between organizations that are transparent, equitable, and generative.

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Maddie Grant

CULTURE DESIGNER, HUMAN WORKPLACES

Maddie is an expert digital strategist and workplace culture designer whose superpower is skillful shepherding of organizations through cultural and digital transformation. Maddie has specific expertise in internal (staff) and external (member/customer) engagement, as well as in generational differences in the workplace.

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What We'll Cover Today

Introducing the Data Maturity Spectrum (Karen)

Matching Tools to Your Level of Data Maturity (Jenn)

Culture's Intersection with Data Maturity (Maddie)

Where Organizations Get Stuck

Open discussion throughout! Please ask questions at any time!

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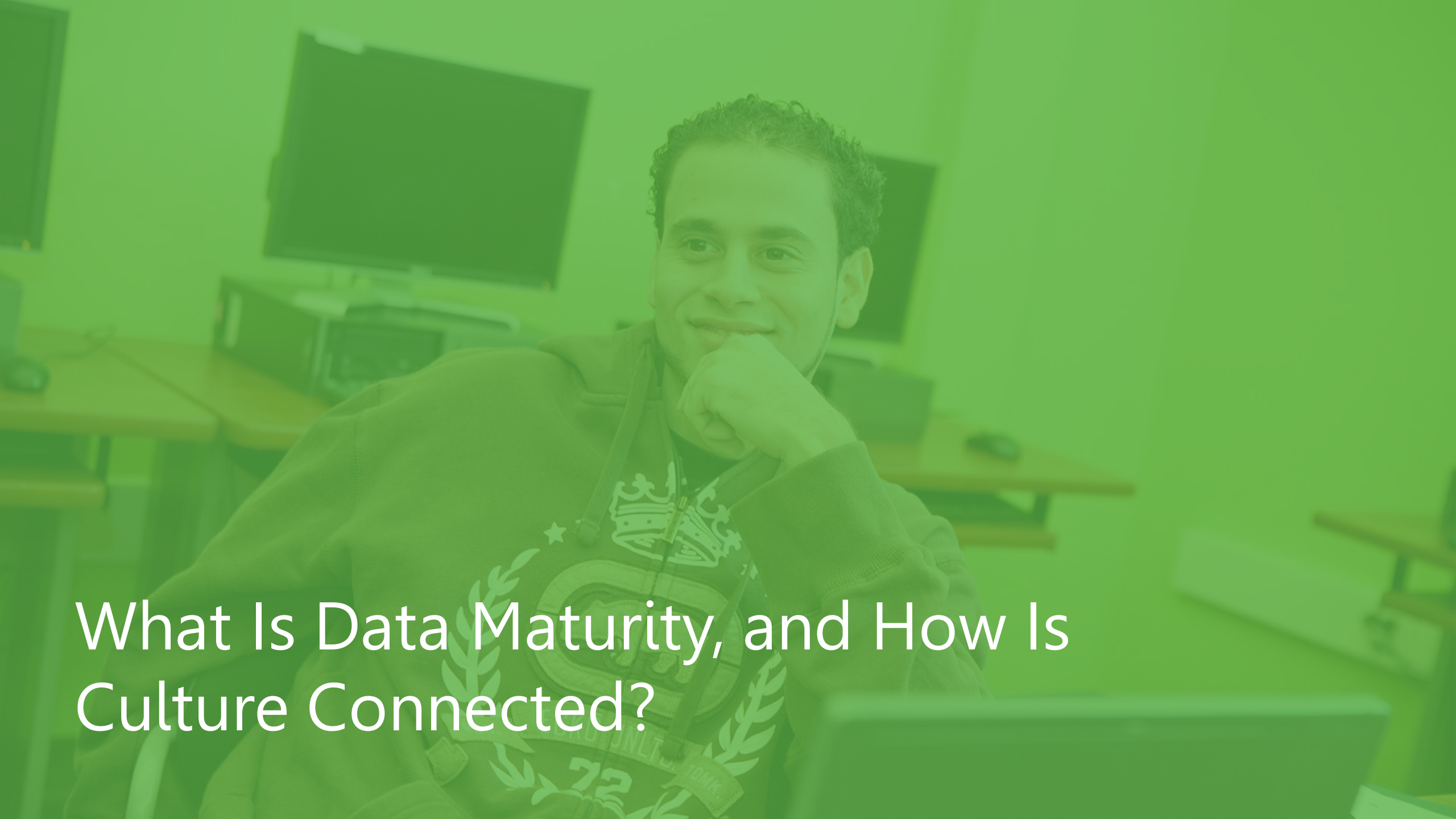
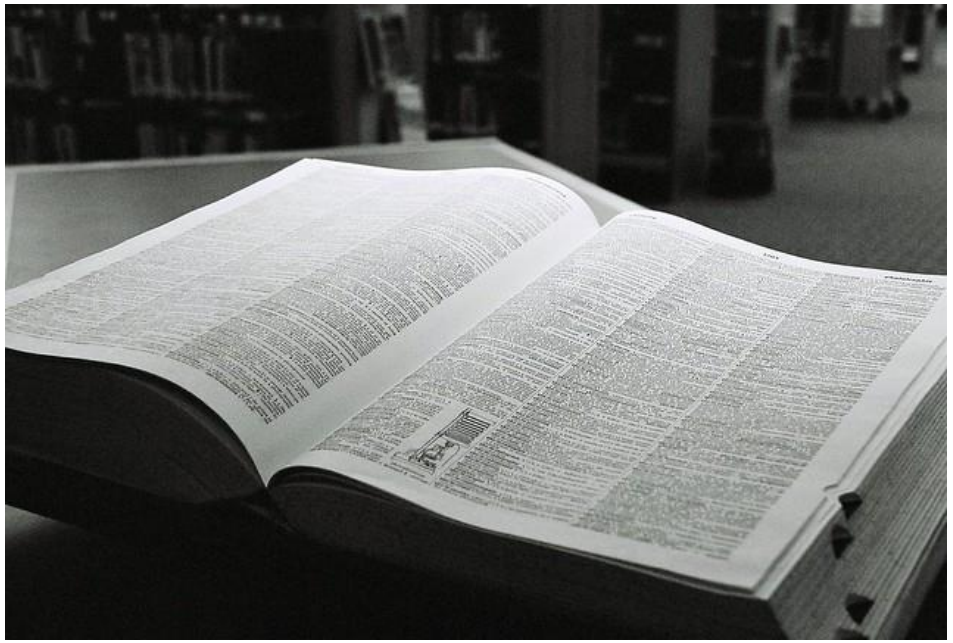


What Is Data Maturity, and How Is Culture Connected?

What Does Data Maturity Mean?

- Is it about big data?
- Small data?
- Tech tools?



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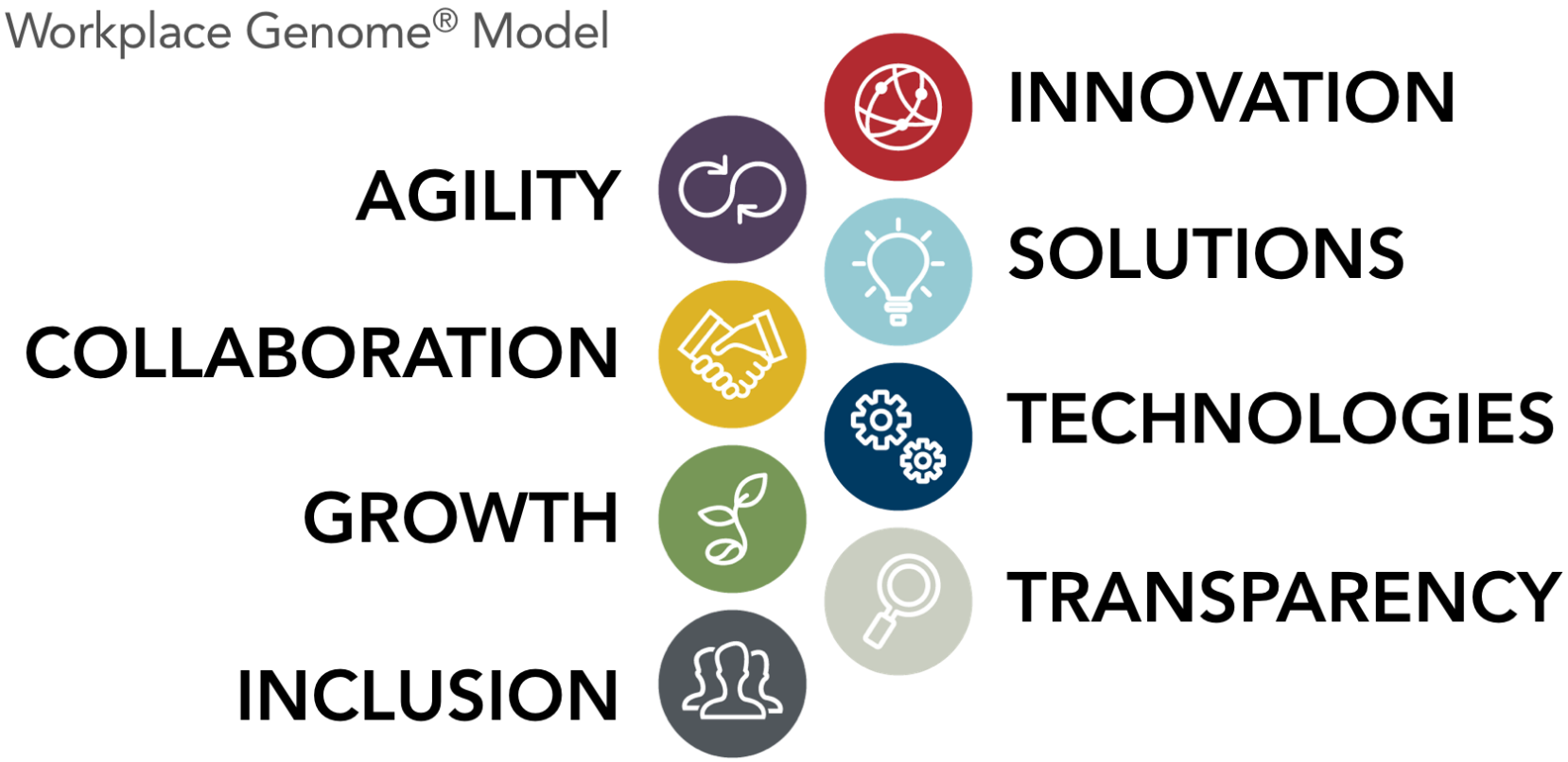
Data Maturity Is About Org Culture

Becoming a Data-Informed Organization, 2017

*"A data-informed organization is one that **collects** and **tracks** information about constituents—from simple things, like contact info or event attendance, to more complex ideas, like the different ways they interact with your programs—and **acts** on what you learn from that information."*

Workplace Culture Has Multiple Dimensions



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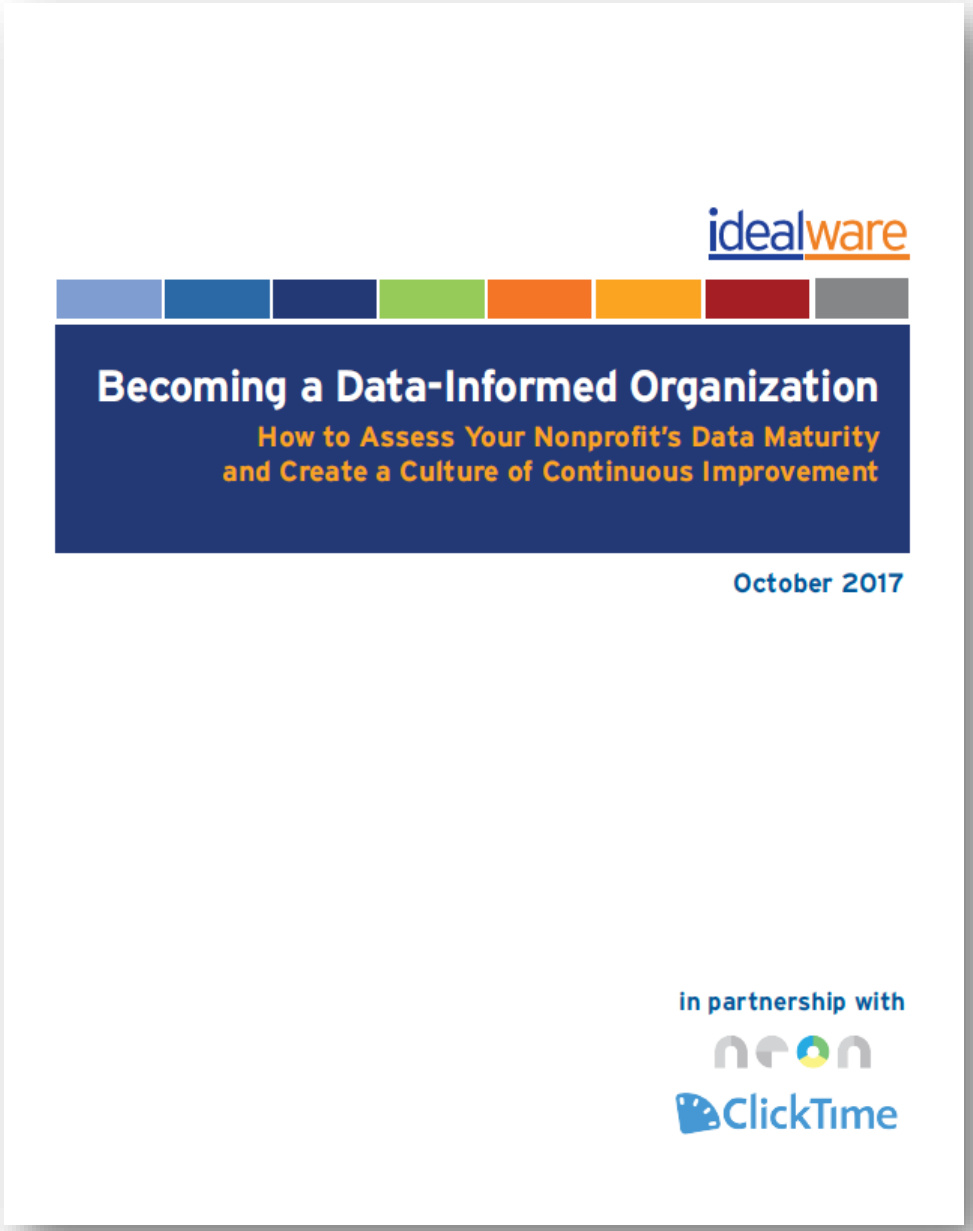
Stages of Data Maturity



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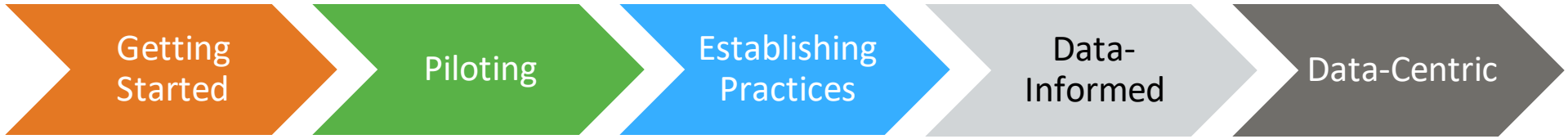
It's a Developmental Model – Not a Typology

Meaning…

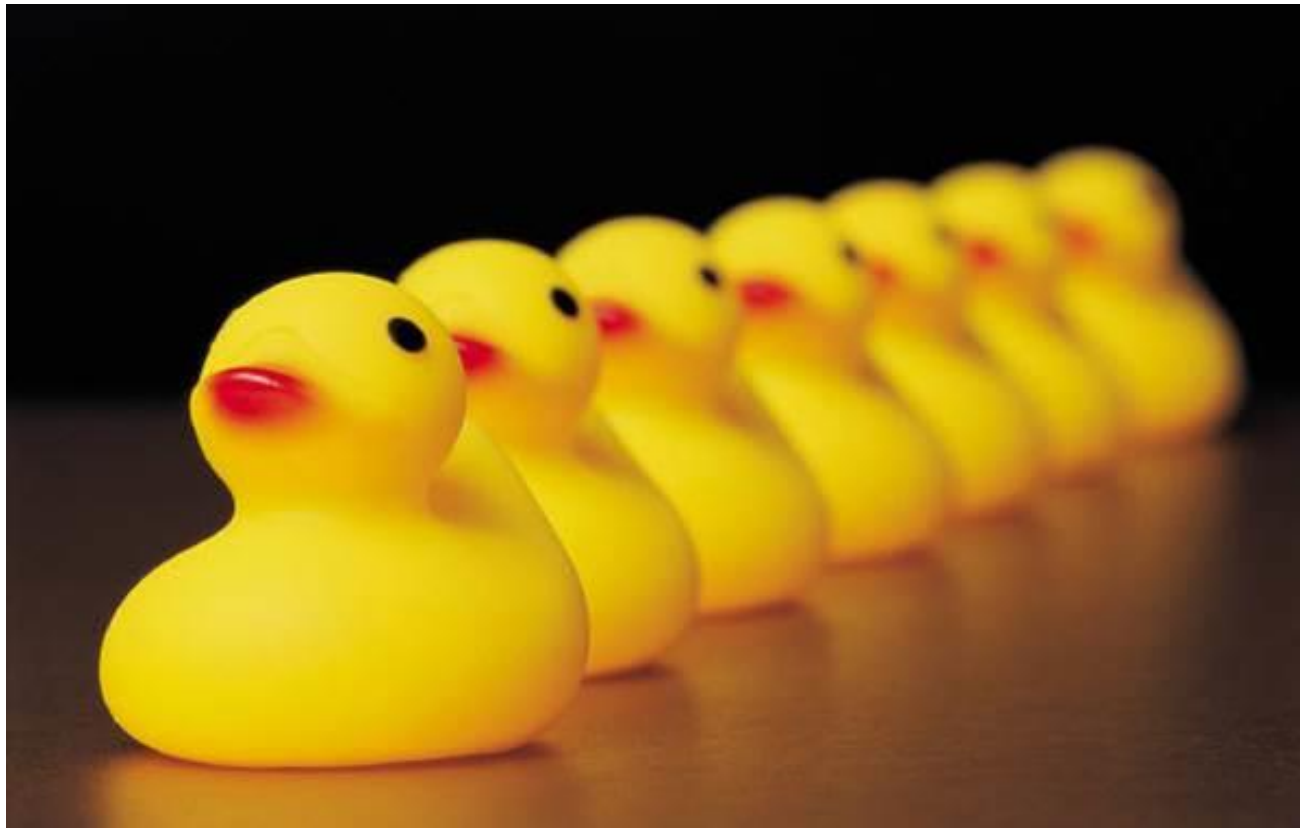


Stage 1: Getting Started

You might be collecting some basic data.

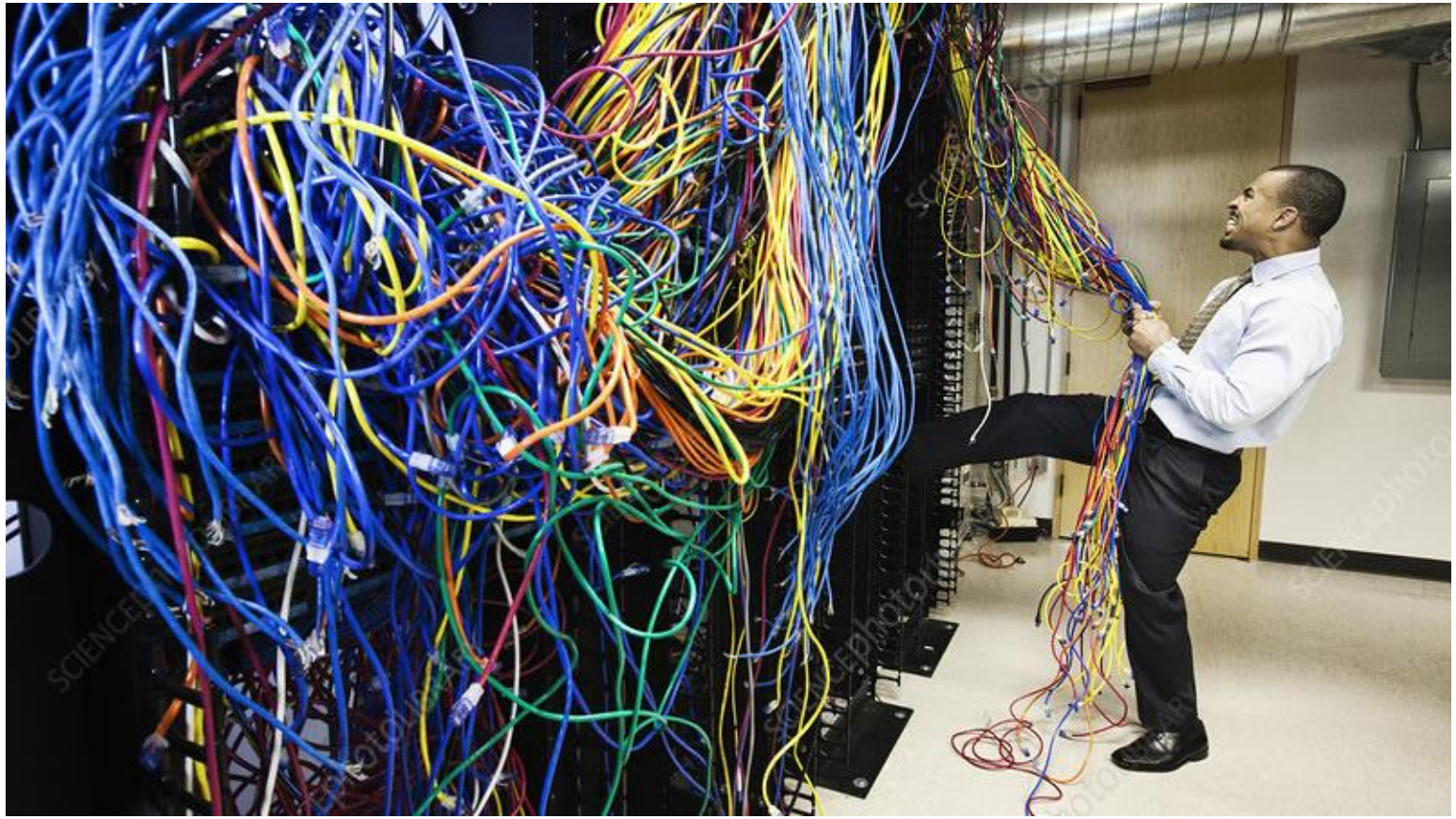
But things feel disorganized and inefficient.

Stage 2: Piloting



Your data is in a spreadsheet or database, where you can sort it and create reports.

You have begun to define metrics and processes.



Thinking Like a Computer

“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.” – Bill Gates

Stages One and Two: Brains and Situations Define Your Data

You're not yet sure:

- If the sequence of steps to capture certain data is always the same
- Who is making decisions about data – definitions, when to enter it, how to report on it
- What data you really need to capture, or what indicators you need to pay attention to

And that's OK – because you haven't fully figured it all out yet!

Stages One and Two: Choosing Tools

Stay flexible in phases 1 and 2.

This isn't the time for automation or efficiency.

This is the time for being very hands-on and asking great questions.

It's completely OK to stick with Office / GDocs at this stage!

Stage 3: Establish Organization-Wide Practices

The ED and most of the staff supports expanded use of data.

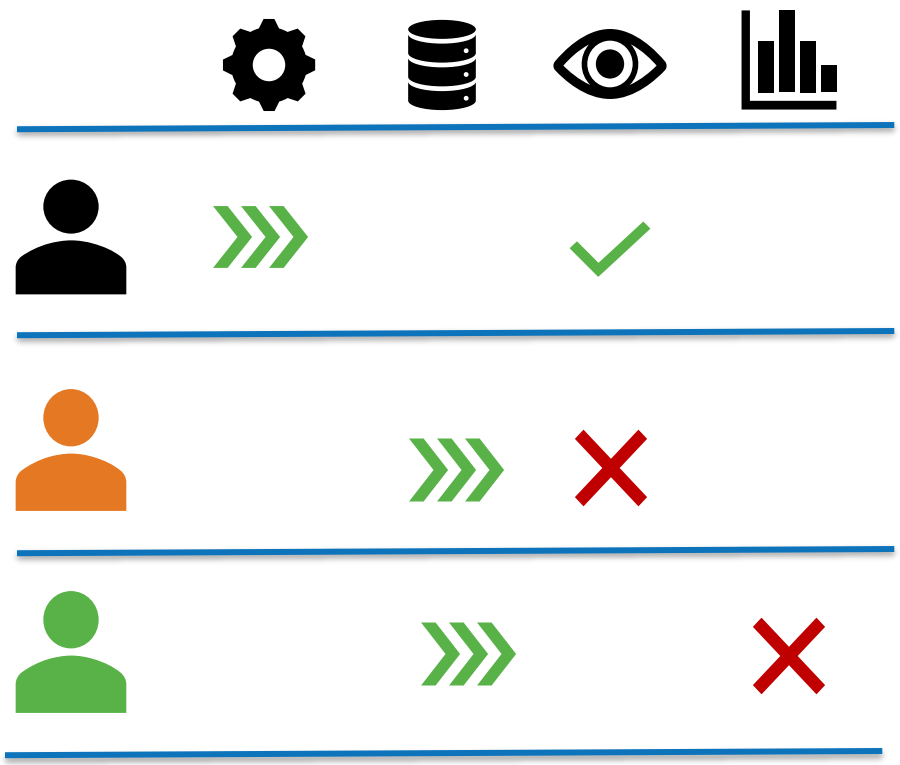
You have defined a logic model and put someone in charge of data.

Stage 4: Data-Informed

Data-driven decision making is part of the organization's culture.

You take external research and transparency into account.

Thinking Like a Computer In Stages Three and Four



For Every Data-Generating Process, You Know:

- The decisionmakers, data producers, and data consumers
- The set of steps that should occur, who should do them, what data should be referenced (if any) and what data should be captured
- How the data relates to reports, the logic model, management goals, or other key metrics
- How reports are generated so that a consistent understanding of information can be achieved organization-wide

Stages Three and Four: Choosing Tools

You have started to define and document your rules and establish common understanding and norms around data.

While you don't want to stagnate, you do want to focus on clarity and consistency.

Customizable enterprise systems let you start achieving efficiencies. This stage is where structured tools like Salesforce, ETO, Microsoft Dynamics and others are really useful.

Stage 5: Data-Centric

Data is part of the organization's DNA.

Hypotheses are made and tested to optimize programs.

(This is the ultimate stage—but it doesn't mean perfection.)

Thinking Like a Computer In Stage Five

Data-driven Learning, Prediction, and Adaptation

You can easily answer the basic questions with data

You look to your data as much for "what if" questions as for "what happened" questions

Your software is now infrastructure - rules and governance keep the peace and stability enables growth and insight

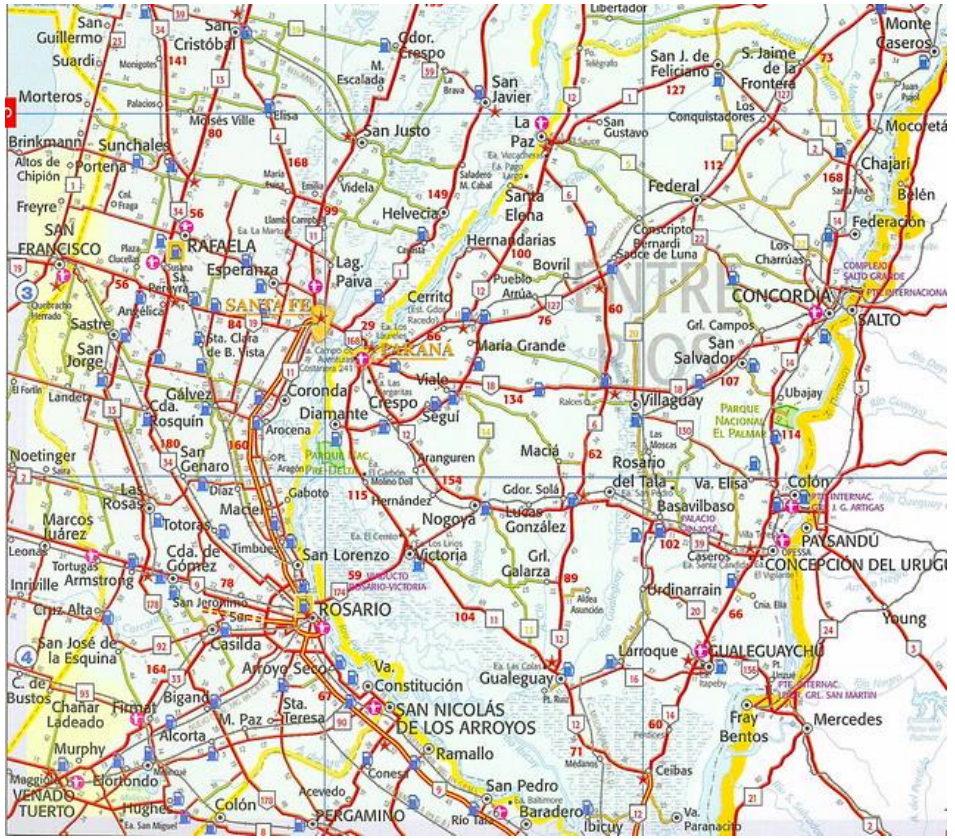
Enterprise systems and middleware

BI and predictive analytics

In Order to Find Your Way…

It helps to know where you are starting from, and where you are headed.

Understanding your current level of maturity helps you choose appropriate tools and practices.



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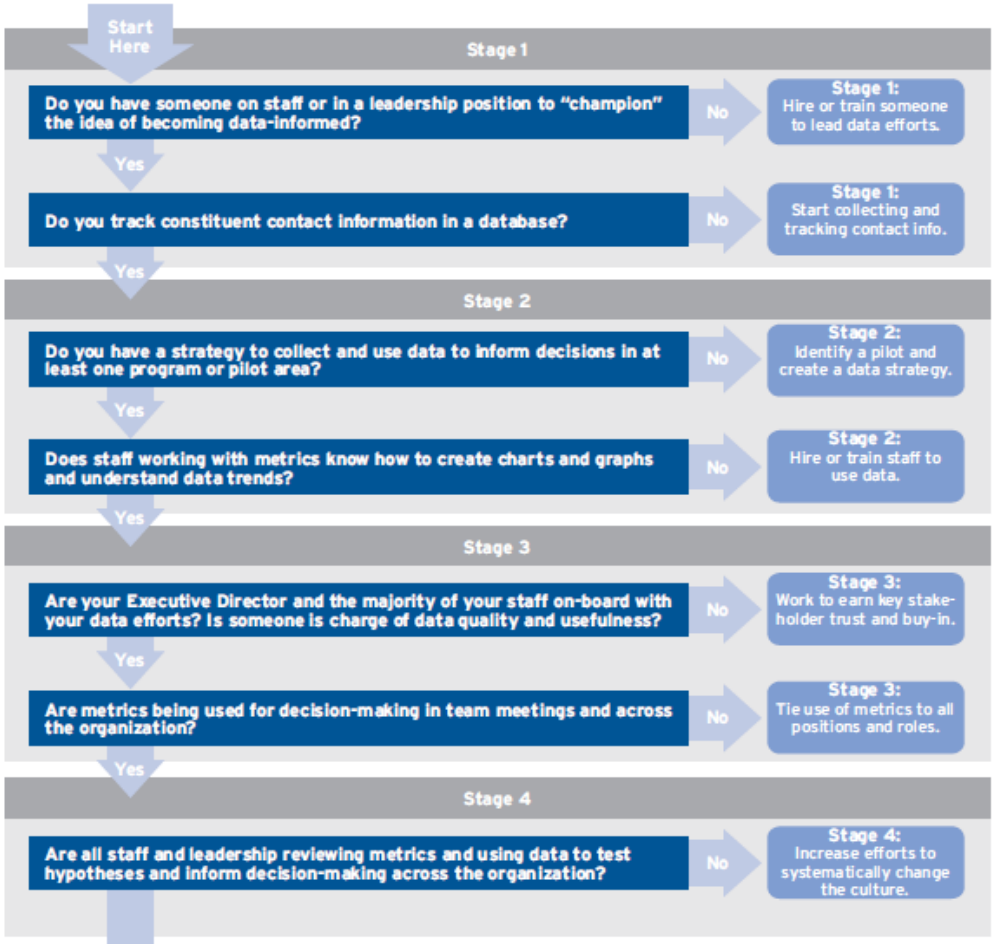
Discover Your Maturity Level

SELF ASSESSMENT

To move forward on the spectrum, you first need an idea of where you're starting out from. Beginning at the top of the flowchart on the next page, follow the arrows to determine your current state of data maturity.



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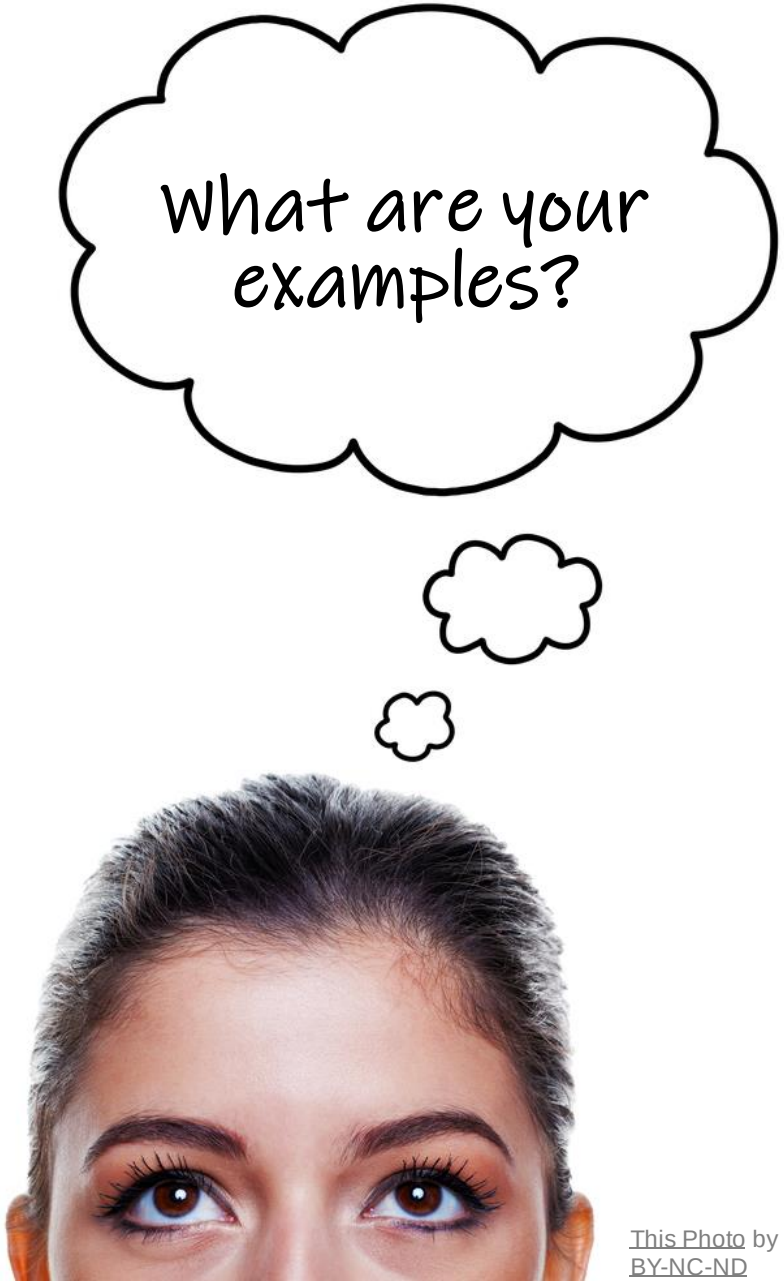
Moving Along the Spectrum of Data Maturity

What Gets in the Way of Data Maturity?



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What Gets in the Way of Data Maturity?

Example:

- Fear that data will reveal the organization isn't as effective as it claims to be.
- What's a possible solution to this?

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What Gets in the Way of Data Maturity?

Example:

E.D. is very experienced and trusts her instincts/discounts the data.

What's a possible solution to this?

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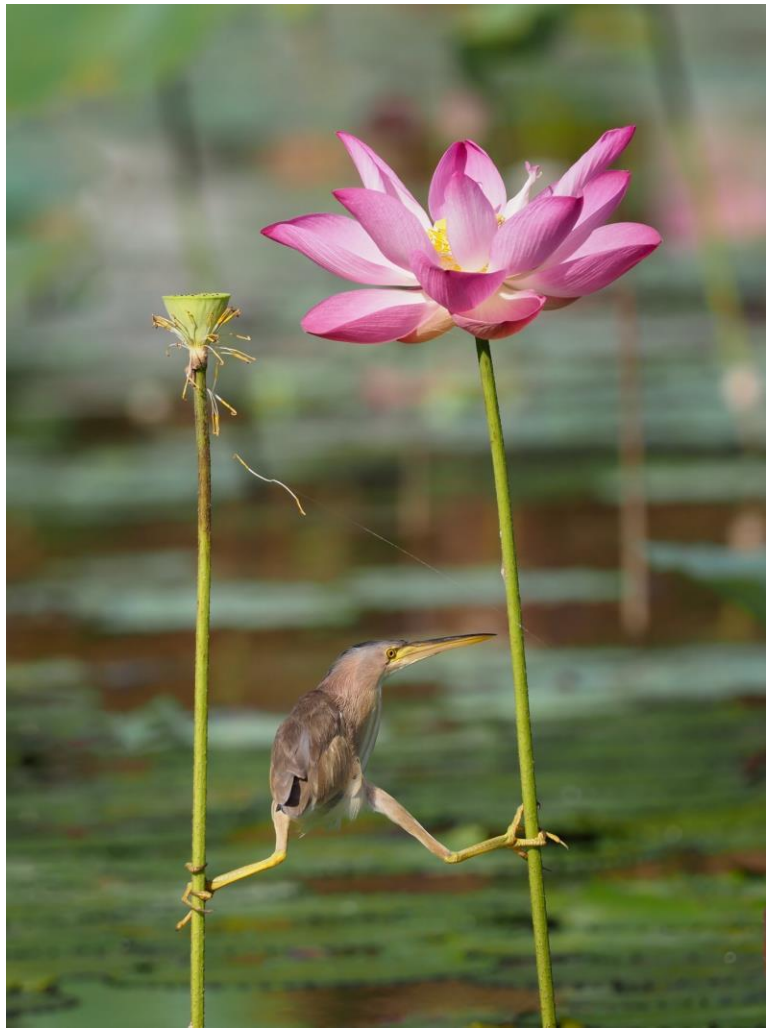
Start Practicing Good Change Management

Your technology systems are the embodiment of your management decisions and processes.

They support and enforce the behaviors and actions you and your clients see every day.

Care for them accordingly.



Wrap-Up

Additional Learning Resources

- Finding Truth In Data
- Nonprofit's Guide to Data Migration
- Nonprofit's Guide to Managing Security Risk
- Data Sanity for Nonprofits
- Playing the Data Playbook
- Recorded Course: Using Data to Transform Your Organization
- From Chorus America and WolfBrown: Intrinsic Impact Audience Project
- Workplace Culture Resources

Questions?

Acknowledgments

Maddie Grant, Jenn Taylor, and Karen Graham jointly developed these materials with the help of their colleagues.

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