

Making Analytics Understandable and Strategic

Strategic Consulting Services for Colleges and Universities



Background

Most colleges and universities are awash in data. Unfortunately, they lack the capacity to effortlessly turn their data into meaningful information. Nor can they easily access, combine, and repurpose that information seamlessly to support analysis, drive decision making, and improve student success. In many cases, the data they need are hiding in plain sight. They are frozen in place by sub-optimized data models (i.e., either complex ERP systems or inflexible data warehouse designs), inaccessible to all but power users (i.e. those able to manipulate difficult-to-use reporting tools), and/or by the highly proprietary nature of some systems.

Leading-edge institutions are addressing these issues by building or buying sophisticated analytic tools or applications to address key institutional performance issues. Our experience has shown that the “analytics IQ” of campus leaders is generally low and that BI and analytics remain “geek” issues on many campuses. So it’s no surprise that most BI/analytics tool selections or acquisitions are made by a limited group of decision makers.

Traditional software selection and implementation processes rarely engage the campus community at large. However, it is important that faculty, staff and administrators – the end users -- understand how new analytics can be leveraged to achieve institutional goals. Not including the campus community at large is to miss a golden opportunity to make sense of the current platform and communicate an understandable analytics strategy and migration path for the future. To correct this deficiency, Strategic Initiatives, Inc. offers a two-day consulting engagement for institutions that are: 1) considering a new analytics application/BI enhancement, 2) implementing an analytic application/BI tool, or 3) wishing to generate more strategic impact and leverage analytics perspectives and capabilities on campus.

Elements of Consulting Service

Title: *Making Analytics Understandable and Strategic*

Description: A concentrated, strategic consulting service provided by a two-person consulting team consisting of Donald M. Norris and Joan Leonard of Strategic Initiatives, Inc, recognized experts in action analytics ®. For a full description of the firm and its capabilities, see www.strategicinitiatives.com.

Primary Audience: Institutions that are considering an analytics application/BI tool or have acquired an analytics application/BI tool and are preparing for implementation. **Secondary Audience:** Institutions that have implemented an analytics application/BI tool but have not succeeded in making analytics strategic or broadly understood at the institution or in leveraging analytics to sufficiently support decision making.

Objectives: 1) To raise the analytics IQ of leadership and end users, 2) to create tangible, useful work products (see deliverables below), 3) to prepare leadership and champions to “tell the analytics story”, and 4) to realign the institutional research and planning functions to support “action analytics ®.”

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Deliverables: The engagement will result in a final report supported by the following figures and discussions:

- Glossary of Terms (Existing prototype is tailored to institution needs);
- Figures 1-3: Diagrams of the Institution’s Analytics Environment, Capturing Yesterday, Today (current analytics/BI implementation) and Tomorrow (future extensibility of analytics);
- Figure 4: Readiness for Analytics (assessment of six elements);
- Figure 5: Davenport/Harris Typology of Reporting/Query/Analytics with Explanations Relevant to the Customer’s Environment and the Current and Future State;
- Figure 6: Change Management Framework for Expanding the Understanding and Use of Analytics – an 8-Step Change Management for Analytics Process;
- Description 1: Making Sense of How to Leverage Analytics in Understandable Language and Raise the “Analytics IQ” of Leadership and the Campus Community;
- Description 2: Articulating How Analytics Could be Used to Achieve Key Institutional Goals, including Focusing on Student Success;
- Description 3: Optimizing Data, Information, and Analytics Resources; and
- Description 4: Possible Migration Paths and Extensibility of the New Analytics.

Agenda: Dr. Norris and Ms. Leonard will make a campus visit spanning two days. There must be a campus champion(s) to organize and manage their visit. During that visit they will meet with key decision makers and create a draft report on which they will brief campus leaders at the conclusion of the visit. A typical schedule of meetings and work time during the two-day visit will follow the framework below.

Day 1		Day 2	
8:00 – 12:00	Norris and Leonard conduct kick-off meeting with key analytics stakeholders – CIO, IR and Planning Directors, Enrollment Management Director and Admissions/Registration Directors.	8:00-10:00	Norris and Leonard review completed templates, figures, and materials with stakeholders.
		10:00-12:00	Meet with additional stakeholders to fill in information gaps.
12:00 – 1:30	Norris and Leonard have lunch with campus executives. Depending on the campus, this could be the Provost or the VP for Business/Finance.	12:00 – 1:30	Norris and Leonard have lunch meeting with academic leaders about the use of analytics (participants tailored to each campus)
1:30 – 5:00	Norris and Leonard will conduct working sessions with analytics staff.	1:30 – 3:00	Norris and Leonard complete materials for final briefing
		3:00 – 5:00	Norris and Leonard complete final briefing (May include campus leadership)
Evening	Norris and Leonard will work on templates, figures, and materials	Evening	Norris and Leonard will depart. Their report will be sent within one week.

Price: This service is available for the firm fixed price of \$10,000 in professional services plus the actual cost of travel, accommodation, and sustenance for Dr. Norris and Ms. Leonard to make their visit.