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Taming the Wild West of Your Data for Reporting

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critical role in this promotion. ”

Natalie Morrison, CTP, FPAC

Manager of Financial Planning &
Analysis, *WaterOne*



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A Virtual Event for Finance Professionals

DON'T FORGET

Join us tomorrow, **June 10 from 1-2 p.m. ET,**
for a roundtable discussion and debrief



Premier Sponsor AARP®

Taming the Wild West of Your Data for Reporting

collectiv



Headquarters: Chicago

Expertise: Planning & Analytics

Services: Visioning | Training | Consulting



Greg Gillespie
Principal at Collectiv

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PowerApps



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National Restaurant Association

The largest foodservice trade association in the world. They represent and advocate on behalf of more than 500,000 restaurant businesses.



Eric Ellis
CFO at National
Restaurant Association

[Connect with me on LinkedIn!](#)



A Virtual Event for Finance Professionals

Taming the Wild West of Your Data for Reporting

Presenters:

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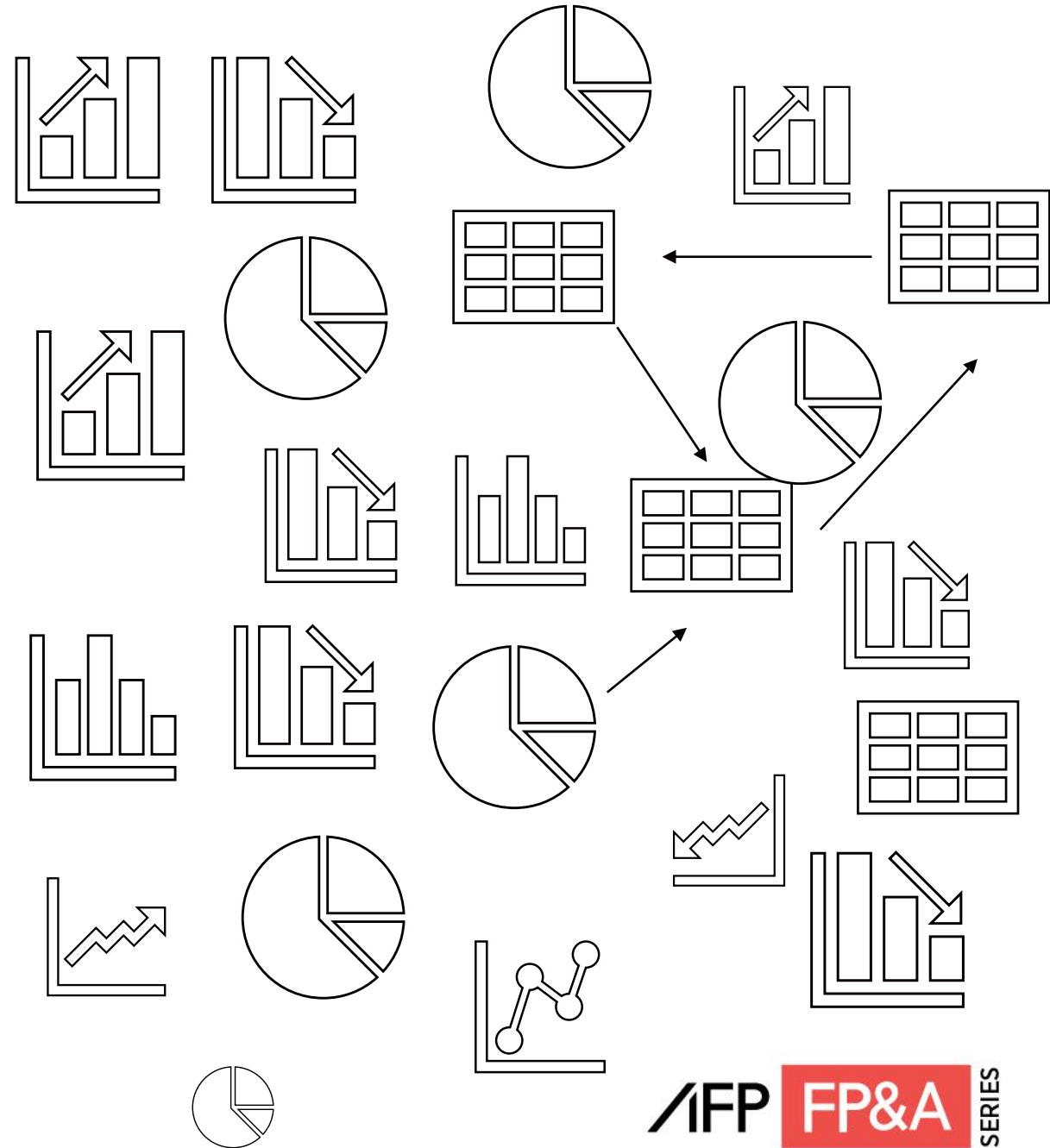
c@llectiv

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Wild West of Reports

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AFP **FP&A** SERIES

Poll Question 1

What are you most excited to learn about today?

- How to improve data quality
- How to tame the wild west of reporting
- All the above

The Goal of this Presentation



- **Help you prevent or eliminate your Wild West of reporting by sharing real world examples and best practices.**
- **Create excitement around the possibilities of CoE.**
- **Challenge you to walk out of here with ideas to enhance your data quality and apply the principles of a CoE.**

Poll Question 2

Does your organization have a Center of Excellence?

- My organization has one
- My organization needs one
- What's a Center of Excellence?

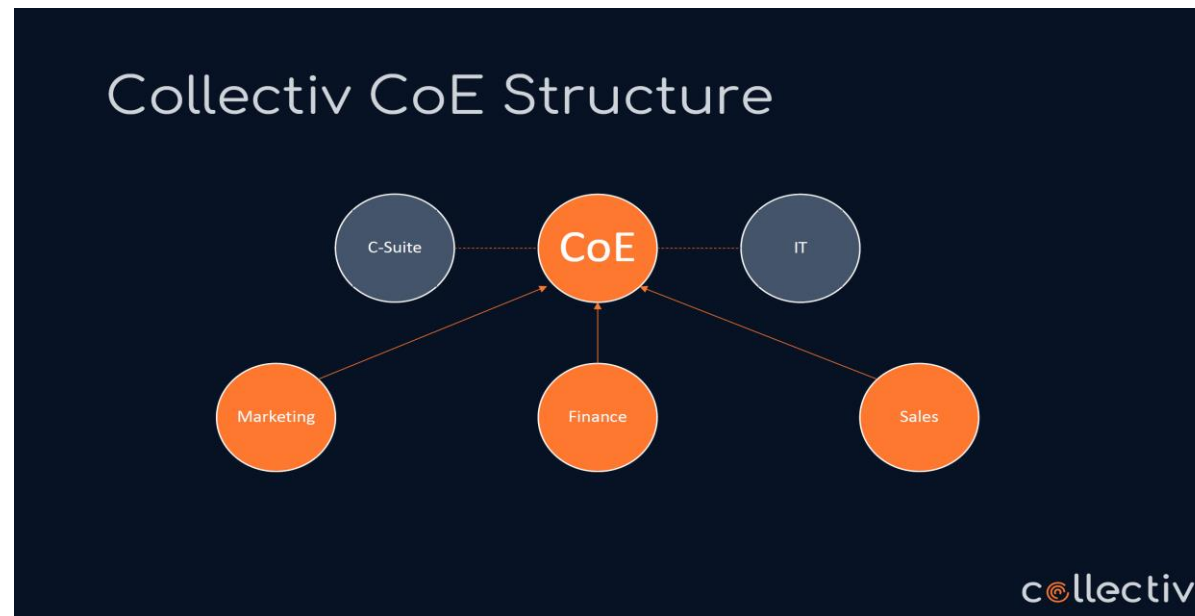
What's the Problem?



- **How do we get our data right...and keep it right? (i.e. Data Quality)**
- **How do we get our reporting right – consistent, accurate, and timely?**
- **How do we get buy-in across the organization?**

Solution: Center of Excellence

Establish a Center of Excellence (CoE) approach with best practices and key processes.



What is a Center of Excellence?

“A permanent, multi-discipline team empowered to define, develop and provide governance for Business Intelligence across the enterprise”

A Center of Excellence exists to:

- **Develop and apply standards, best practice, policy & governance.**
- **Provide training, education, mentoring and guidance.**
- **Provide a cross-departmental organization related to the deployment and existence of Business Intelligence across the enterprise.**

Primary Goals of CoE

- Ensures that BI is aligned with corporate strategy.
- Drive success and adoption of BI content.
- Maintain ‘**Single Versions of the Truth**’ to ensure Data Quality.
- Ensure the consistent applications of standards and best practices for all BI initiatives.
- Provide a standardized, sustainable and scalable, enterprise-wide environment for BI delivery.

CoE Requirements



Executive Sponsor



Champions



Governed Standards and Policies



Continuous Learning



Constant Engagement

Getting our Data Right

- **Garbage in = Garbage out**
 - Is data being entered into our systems correctly?
- **Data Validation/Reconciling/UAT**
 - Validate/Reconcile/Test → Validate/Reconcile/Test
- **Establish Certified Datasets**
 - Single versions of the truth so we're all using the “same sheet of music.”
- **Consistency with our Processes**
 - Helps keep our data right once the above steps have been accomplished.

Getting our Reporting Right



Report Build Process:

1. Hold Discovery Session
2. Put a Deliverable time-line in place
3. Build, Review, and Data Validation
4. UAT and Hand-off
5. Continuous Improvement

STANDARDIZE TEMPLATES !!

Keeping our Reporting Right...

- **Report Building Processes**
 - Great tools still need a well-defined process.
- **Report and Change Request Process**
 - Defined approach for new requests.
 - **Power App, Team Sites, Spreadsheets....it doesn't matter as long as you have a process!!**
- **Report Building Process**
 - Keep Consistency (also helps with buy-in/adoption)

Getting Buy-in and Adoption

- **Identify your Champions & Power Users**
 - Who's going to drive the process and ensure consistency and quality?
 - Reward those who are helping drive adoption (i.e. recognition, incentives, etc.).
- **Start small and grow (K.I.S.S. Method)**
 - Identify small pilot projects.
 - Start with one easy process → Communicate & Implement → Improve
- **Constant communication and continuous learning**
 - Announcement of new processes
 - Lunch and Learns
 - Grumbles & hackathons

How an you get Started?

- **Get involved.**
- **Know and understand the business you are working with.**
- **Find Champions within your organization.**
- **Develop YOUR process and DOCUMENT.**
- **Start small and grow. (K.I.S.S).**
- **Start building business cases to support ideas and solutions.**

Your life with the CoE & Data Quality



Your life without CoE & Data Quality



Call to Action

I CHALLENGE YOU to start implementing these best practices throughout your organization.