



The Data Strategy Toolkit by Datavizin

**A step-by-step guide to build scalable
and powerful data-driven business**



Introduction

In today's competitive landscape, data is the cornerstone of effective decision-making. Yet, many businesses struggle to harness its full potential due to fragmented systems, unclear strategies, or lack of expertise.

This *Data Strategy Toolkit* by *Datavizin* introduces a clear, actionable 5-step methodology to help organizations transform raw data into powerful decision-making tools. The methodology is built around 5 main steps:

1. **Explore:** identify and gather relevant data by exploring the current systems and processes used by your company. Observe your teams in their daily operations and learn from their daily routines.
2. **Understand:** connect the dots between your systems, solutions and process and understand how your data is produced, and who is the true owner of the data. Use this step to identify the single sources of truth of your data catalog (master data).
3. **Structure:** aim on the long-term strategy. Now that you have a deep knowledge of your infrastructure and you've established your master data catalog, you are ready to build a robust architecture around your data.
4. **Analyze:** don't rush straight on data and start building dashboards and reports from there ! First, analyze your current situation and think about how you can monitor your operations. It is time to use such words as KPI and determine how to calculate them.
5. **Act:** this step might be the most painful one, but you already have worked hard to get there, so it is time to act upon your analyze. This is the emphasis of your data journey: each data management tool must be created with the following aim : implement and monitor strategies based on insights.

This guide is designed for organizations of all sizes, whether you're just starting your data journey or looking to refine existing practices and policies.

Step 1: EXPLORE

Goal: explore your systems, identify and gather relevant data sources across the organization.

Key actions

- Map the **key processes** and the software or tools used to host these activities.
- Conduct a **data inventory** to locate all available data sources.
- Engage stakeholders to understand their needs, challenges and **pain points**.
- Identify **potential gaps** in data coverage and plan to address them.

Pro tips

- **Don't rush on data** and data sources yet. Focus on systems and processes.
- Prioritize systems, processes and solutions based on **business impact**.
- **Look for hidden opportunities**, such as unstructured data in internal files, emails or logs.

Tools and ressources

- Internal documentation and surveys to gather user feedback on existing systems.
- Data discovery tools (e.g., Service Now, Elasticsearch, Tableau).

Step 2: UNDERSTAND

Goal: understand how your key data is produced inside your organization.

Key actions

- **List your key processes** / tools and take a look at the data they create.
- Determine where are your **single sources of truth** for main activities and topics.
- **Involve your teams**. They create the data, they host the value.
- Don't let go this step if you still don't know the main **pain points** of your teams.
- Define clear Key Performance Indicators (KPIs) to **track success**.

Pro tips

- **This is still not about the data** itself, but about how the data is created.
- **Collaborate with teams** to interpret complex activities. They know. Thrust them.
- Focus on the key processes and activities to **maximize your impact**.

Step 3: STRUCTURE

Goal: use your knowledge to build a scalable and reliable data management process.

Key actions

- Focus on your **master data** and make them at the center of the structure.
- Design a **data model** 100% focus on your business goals.
- Implement **data governance policies** to ensure security and compliance.
- Create a **data catalog** to document datasets and their usage.
- Implement automated validation scripts to **ensure consistency**.
- **Clean** the data by removing duplicates and correcting errors.
- **Enrich** data with missing information to increase its value.

Pro tips

- Now you can focus on the **data** itself and get your hands dirty.
- Don't get distracted, focus on **impact** and **business value**.
- Still **involve your teams** and make them test the data.
- Build **scalable tools**. You would be surprised to see how fast a data-driven business is going.

Tools

- SQL Server, MongoDB, Oracle, MySQL or other database management systems.
- Metadata management platforms, like Alation or Collibra.
- Documentation tools and platforms (wiki, Confluence, etc.)

Step 4: ANALYZE

Goal: create insights that will make decision-making happen.

Key actions

- Develop and share **Business Intelligence** dashboards and reports.
- Apply statistical or machine learning models to **uncover trends**.
- **Test** hypotheses and **simulate** potential business scenarios.
- **Facilitate** your decision-makers' daily life.

Pro tips

- It's all about impact, perspective and **bringing value** to your teams.
- Use tools like Power BI or Qlik for **interactive visualizations**.
- Incorporate **predictive analytics** for forward-looking insights.

Step 5: ACT

Goal: assume your analysis by acting upon it.

Key actions

- **Act.** If you don't, then your analysis is useless and you should focus elsewhere.
- Create workflows with human validations to **make sure actions are taken**.
- Regularly **review and update strategies** based on performance.

Case study

Monitoring your stock inputs and outputs, connecting this information with your sales orders and your purchasing activities will help you optimize your inventory value, limit your costs and save space in your storage rooms.

Conclusion

By following this 5-step methodology, organizations can aim towards a successful data-driven business. Building dashboards and reports is easy once you have access to a data source. The hard part comes when you want to create business value and impact from data. Many organizations fail their data journey by focusing too early and too deeply in their data, without first trying to understand and explore their processes.

Also, the data-driven journey is a never-ending trip. Don't aim straight on the destination, start small, focus on high-impact areas, and scale as you build confidence in your data capabilities.

For a tailored support, Datavizin offers comprehensive solutions to help you build and navigate each step of your data-driven journey.
