

## Process of Developing Your Data into Actionable Insights

Data alone does not improve a business. Reports do not create value. Dashboards do not drive profit.

### Decisions do!

The real purpose of data is to improve decision-making. When structured properly, data becomes a tool—just like capital, people, or technology—used to increase productivity, strengthen margins, and elevate enterprise value.

### Phase 1 – Understanding What to Solve For

Before pulling a single data point, clarity must come first. More data without focus only creates noise.

#### Phase 1 | Step 1. Define What You Are Trying to Solve

Be specific.

- Are margins declining?
- Is inventory turning too slowly?
- Are customer service levels slipping?

*Vague problems produce vague reports. Precision produces insight.*

#### Phase 1 | Step 2. Decide Why You Are Solving It

Every initiative must connect to business value.

- Are you protecting cash flow?
- Improving EBITDA?
- Increasing throughput?
- Reducing operational friction?

*If the “why” isn’t clear, the solution will drift.*

#### Phase 1 | Step 3. Define the Desired Outcome

What measurable improvement are you targeting?

- Increased productivity
- Improved gross margin
- Reduced working capital
- Faster order cycle time
- Improved on-time delivery

*Clarity here defines success later.*

#### Phase 1 | Step 4. Define the Transition: Current State > Future State

What does today look like?

What should it look like after this insight is implemented?



*The data should clearly illuminate the path from present performance to improved performance.*

## **Phase 1 | Step 5. Identify Who This Impacts**

Understand the Audience

- Owners
- Leadership Team
- Sales Managers
- Operations Teams
- Finance

*Understanding the audience ensures the solution is relevant and usable.*

## **Phase 1 | Step 6. Define What Improvement Looks Like**

Improvement must be visible and measurable.

- It may look like:
- Fewer pricing exceptions
- Higher Fill Rates
- Reduced Freight Expense
- Improved Labor Utilization

*Define it before building anything.*

## **Phase 1 | Step 7. Identify the Primary KPIs for Continuous Improvement**

Every solution should include clear metrics that allow ongoing monitoring.

- A few examples:
- Gross Margin %
- Inventory Turns
- Order Cycle Time
- Contribution Margin by Customer
- Productivity per Labor Hour

*If it can't be monitored, it won't be improved.*



## Phase 2 – Locating the Needed Data

Once the problem is clearly defined, the next step is identifying where the truth lives.

### Phase 2 | Step 1. Where Are the Data Elements Located?

Common sources include:

- ERP Systems
- WMS (Warehouse Management Systems)
- CRM Platforms
- Accounting Systems
- Spreadsheets
- Manual Logs

*Understanding system architecture is critical to reliability.*

### Phase 2 | Step 2. Is the Data Accessible?

Can internal teams extract it cleanly? Or is an outside firm needed to:

- Access Databases
- Build Queries
- Create Integrations
- Clean and Normalize data

*Accessibility determines timeline and cost.*

### Phase 2 | Step 3. How Often Is the Data Needed?

- One-time Analysis
- Weekly Review
- Daily Operational Dashboard
- Real-time Executive Monitoring

*Frequency determines infrastructure design.*

### Phase 2 | Step 4. Determine the Best Way to Serve the Data

The solution must match the user.

- Executive Summary Dashboard
- Department-level Operational Report
- Automated Excel Workbook
- Business Intelligence Platform (e.g., Power BI)
- Data Warehouse or Lake Environment

*The right delivery method increases adoption.*



### Phase 3 – Wireframe the Solution

Before development begins, the solution must be designed intentionally.

#### Phase 3 | Step 1. Does the Design Provide the Intended Data?

Does it answer the original question?

Does it support the decision that needs to be made?

*If it doesn't directly support the decision, it shouldn't be included.*

#### Phase 3 | Step 2. Is the Data Insightful and Actionable?

Insightful data answers “why.”

Actionable data answers “what should we do next?”

*If a user can't explain what action to take after reviewing the dashboard, it needs refinement.*

#### Phase 3 | Step 3. Is the Solution Intuitive?

End users should not need technical expertise to understand it

- Clear Layout
- Logical Grouping
- Minimal Clutter
- Focused KPI Presentation

*Simplicity increases usage. Usage drives impact.*



## Phase 4 – Pilot the Solution

No solution should be launched at full scale without testing.

### Phase 4 | Step 1. Launch a Pilot Version

Deploy a working version of the report or dashboard to a select group.

*Test it against real-world usage.*

### Phase 4 | Step 2. Meet with End Users and Stakeholders

Gather feedback:

- Does this answer the intended question?
- What's missing?
- What's unnecessary?
- Is it clear?

*Buy-ins are built during this phase.*

### Phase 4 | Step 3. Make Feedback-Based Revisions

Refine layout, adjust KPIs, improve clarity.

*Iteration strengthens impact.*



## Phase 5 – Launch the Solution

Execution determines success.

### Phase 5 | Step 1. Provide Onsite Hyper-Care (Day 1)

Be present.

- Support users.
- Answer questions in real time.

*Adoption depends heavily on early experience.*

### Phase 5 | Step 2. Monitor for Intended Results

Track whether behavior changes.

Monitor KPI movement.

*The solution must drive measurable improvement.*

### Phase 5 | Step 3. Meet with End Users and Stakeholders

Confirm:

- Is it being used?
- Does it improve clarity?
- Is it influencing decisions?

*Engagement ensures longevity.*

### Phase 5 | Step 4. Conduct a 6-Week to 2-Month Impact Review (Critical Step)

Review measurable impact:

- Did margins improve?
- Did productivity increase?
- Did working capital decrease?
- Did service levels rise?

*Tie outcomes back to the original objective.*

### Phase 5 | Step 5. Decide on Continuous Improvement

Every solution should eventually be reviewed for enhancement.

- Expand scope
- Refine KPIs
- Automate Further
- Integrate additional systems

*Data maturity is a journey, not a one-time project.*



### Final Thought

The process of developing actionable insight is not about building reports.

It is about:

- Clarifying Decisions
- Designing Insight Intentionally
- Driving Measurable Improvement
- Increasing Enterprise Value

When done correctly, data becomes more than information.

***It becomes a strategic advantage.***

