

TRUE Innovation:

Join the Data Culture Club: Become A Data-Driven Business

Wednesday, February 10, 2:00 PM - 3:00 PM HST



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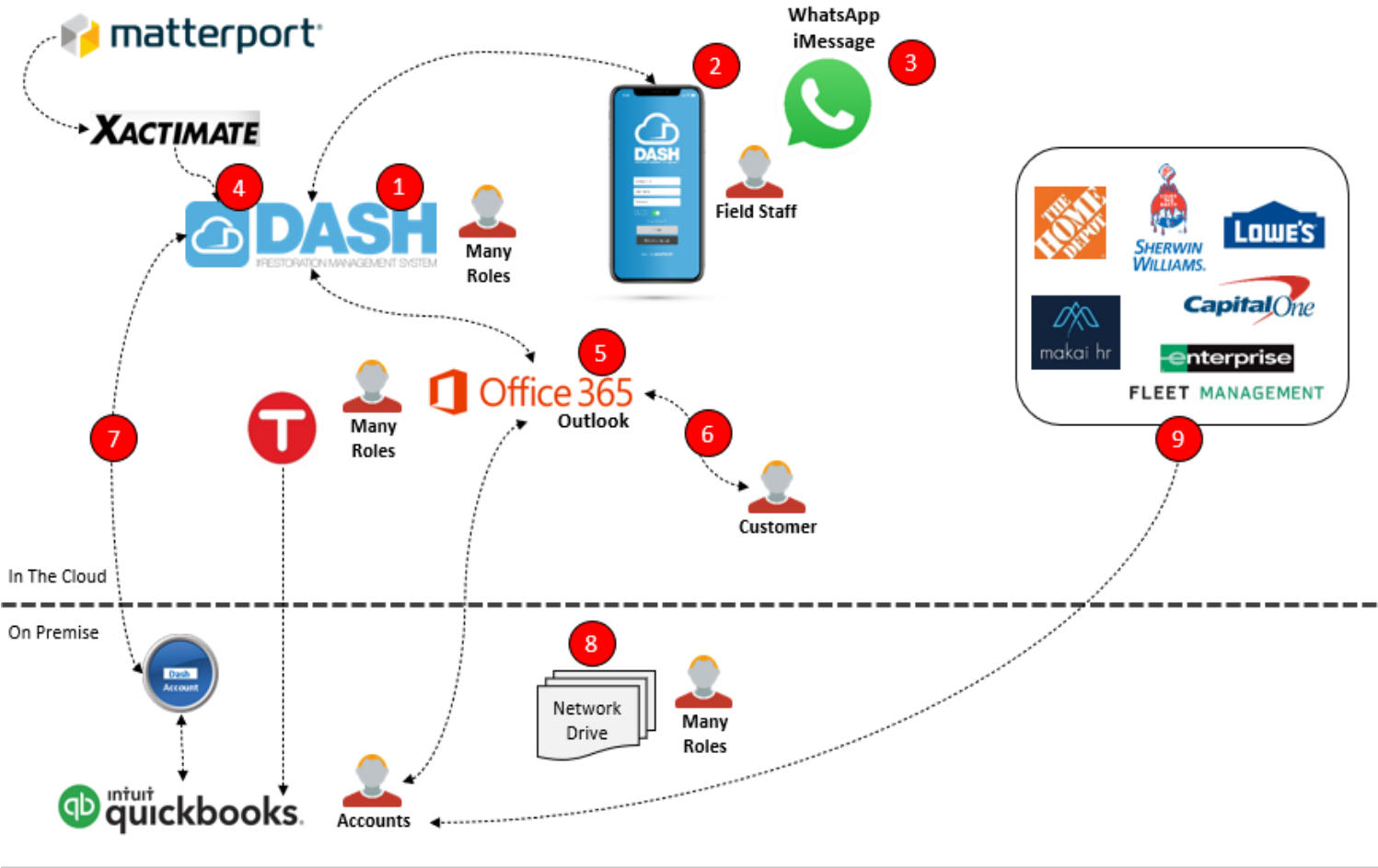


KOA PROCESS



Premier Restoration – Data and application architecture

Current Use of Applications – Areas of inefficiency and data quality concerns



Premier Restoration – Centralized business intelligence

Recon (AR/WIP/CWOP)

Job Number	Earliest Date Started (Days)	First Foreman	Income Est	Total Job Cost QB	Labor Cost (QB)	First GP % Target .35	Total hrs	Sum of Days Last Note	Real Time GP Dollars (QB)	Real Time GP % (QB)
M-19-0599-REC	5/21/2020	Mark Noble	312,887.31	\$0	0.00			7	190,208.44	60.79%
M-20-0219-REC	10/1/2020	Mark Noble	58,590.29	(\$62)	0.00	Red	212.00	5	11,779.31	20.10%
M-20-0383-REC	1/26/2021	Darin Nakooka	42,863.28	(\$530)	0.00		35.08	1	36,096.22	84.21%
M-20-0404-REC	11/23/2020	Manolo Parilla	22,662.80	(\$10,526)	-8,803.57	Red	386.98	4	6,281.35	27.72%
M-20-0463-REC	10/26/2020	Brandon Kolve	20,333.39	\$0	0.00		191.47	5	11,264.04	55.40%
M-20-0521-REC	1/27/2021	Brandon Child	19,043.62	(\$1,142)	0.00		136.10	4	14,050.20	73.78%
M-20-0522-REC	12/22/2020	Mark Noble	35,952.20	(\$22,592)	-1,838.95	Red	70.57	2	5,964.67	16.59%
M-20-0530-REC	12/28/2020	Darin Nakooka	37,814.94	(\$6,682)	-4,827.45		139.48	2	20,951.42	55.41%
M-20-0551-REC	2/2/2021	Brandon Kolve	17,206.93	(\$4,571)	0.00			5	12,635.85	73.43%
M-20-0572-REC	11/25/2020	Darin Nakooka	24,815.09	(\$1,666)	-1,666.00	Red	353.85	1	7,437.34	29.97%
M-20-0589-1-REC	10/22/2020	Brandon Kolve	1,147.96	\$0	0.00			9	802.65	69.92%
M-20-0589-REC	10/21/2020	Brandon Kolve	766.99	\$0	0.00			9	415.99	54.24%
M-20-0595-REC	1/11/2021	Charles Thompson	15,338.68	(\$4,083)	-2,992.62		131.02	2	9,637.25	62.83%
M-20-0611-REC	11/25/2020	Miles Maio	18,638.31	(\$1,604)	0.00		221.07	5	7,931.81	42.56%
M-20-0624-REC	12/29/2020	Brandon Kolve	19,978.66	(\$13,542)	0.00	Red	10.68	8	1,008.94	5.05%
M-20-0632-REC	1/20/2021	John Plummer	8,527.55	(\$4,325)	-1,665.30		100.47	4	4,106.39	48.15%
M-20-0636-1-REC	1/8/2021	Joe Foster	29,282.94	(\$14,178)	-3,761.75		182.30	4	14,081.62	48.09%
M-20-0636-2-REC	1/8/2021	Joe Foster	5,569.28	(\$2,879)	-1,050.62		84.90	4	2,684.85	48.21%
M-20-0639-580-REC	1/13/2021	Darin Nakooka	3,123.86	(\$2,917)	-2,527.51	Red	68.80	9	278.08	8.90%
M-20-0639-584-REC	1/14/2021	Darin Nakooka	3,123.86	(\$1,342)	-1,169.47		31.07	9	1,814.49	58.08%
M-20-0639-674-REC	1/13/2021	Darin Nakooka	4,447.58	(\$996)	-590.27		57.07	9	2,106.37	47.36%
M-20-0640-BRD	11/10/2020	Darin Nakooka	989.99	\$0	0.00		19.92	7	389.33	39.33%
M-20-0670-REC	1/29/2021	Manolo Parilla	6,803.84	(\$217)	0.00		38.70	1	6,309.98	92.74%
M-20-0673-REC	1/15/2021	Darin Nakooka	10,606.72	(\$981)	-822.52		16.45	1	9,649.76	90.98%
M-20-0696-REC	1/20/2021	Manolo Parilla	3,059.06	(\$1,160)	-777.14		41.38	6	1,840.49	60.17%
Total	5/21/2020	Brandon Child	737,343.08	(\$99,106)	-34,300.17		2,658.18	133	388,036.09	52.63%

Island

Maui

Foreman

All

Status

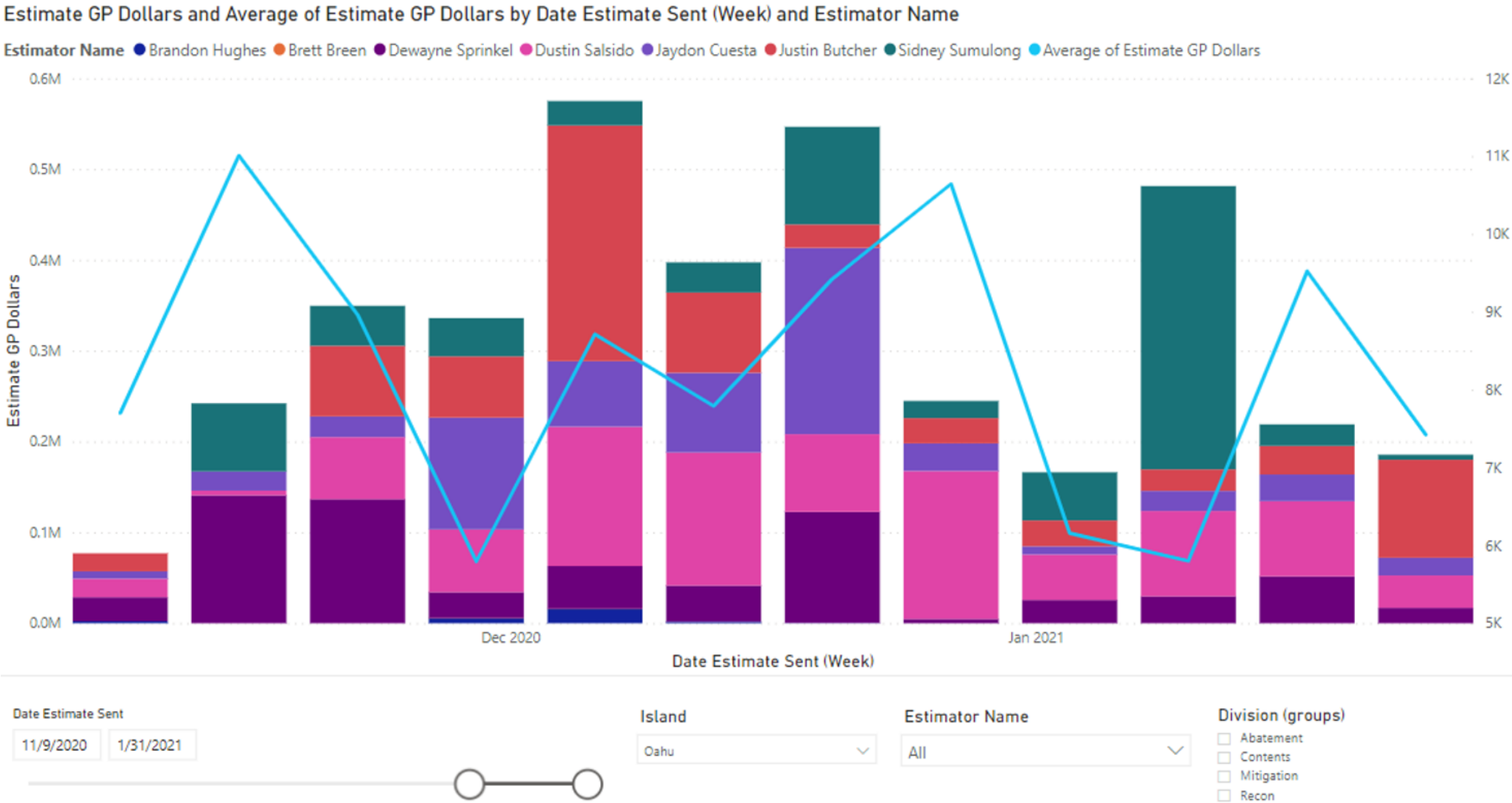
All



KOA PROCESS



Premier Restoration – Centralized business intelligence



KOA PROCESS



Data Maturity Model Stages

Stage 1:
Patchwork Analytics

Stage 2:
Departmental Analytics

Stage 3:
Reactive Analytics

Stage 4:
Proactive Analytics

Stage 5:
Democratized Analytics



KOA PROCESS



Stage One - Patchwork Analytics

Defining characteristics

Decentralized with a patchwork of tools, data sources, and a lack of a company-wide data strategy to enable decision-making.

PEOPLE

There is no official data team. Data efforts are led by dispersed operational analysts, and domain experts rarely lead with data to make decisions.

PROCESSES

There is a hodgepodge of data processes across the organization.

TOOLS

There is a patchwork of analytical tools, including spreadsheets and various in-app reporting tools.

CULTURE

The company mainly places work experience and instinct over data.

The path forward

To exit out of Patchwork Analytics, you will need to focus on culture. The goal is to establish the importance of data, which will be a foundation for later success.

Stage Two - Departmental Analytics

Defining characteristics

Data is siloed. Some departments take the lead in data maturity over others.

PEOPLE

There is no centralized data team, but a data expert might exist in some departments beyond your regular operational or business analyst.

PROCESSES

Departmental data processes are more defined than company-wide processes.

TOOLS

Some departments have more robust tools than others, with little consistency across the whole organization.

CULTURE

Some departments have a more robust data culture than others. Company-wide data alignment is still low.

The path forward

To exit out of Departmental Analytics, you will need to focus on centralizing data resources and processes. The goal is to create alignment between siloed data practices between departments.

Stage Three - Reactive Analytics

Defining characteristics

Data is centralized, but not accessible for everyone.

- | | |
|------------------|--|
| PEOPLE | There is a centralized data team, but their analyses are mainly reactive to data requests. |
| PROCESSES | There are basic processes for analytical work, including a ticketing system for requests of new dashboards and a QA process for publishing dashboards. |
| TOOLS | There are centralized self-serve BI tools, but overall, the tooling is rigid, making it hard for the data team to service all requests. |
| CULTURE | People think of data as a tool to track performance, but not nothing more. |

The path forward

To exit out of Reactive Analytics, you will need to acquire more advanced tooling & processes to proactively answer more strategic questions & define how the business thinks about problems. Focus on the larger cultural change and consider how to set up the first pilots of controlled experiments.

Stage Four - Proactive Analytics

Defining characteristics

There is a data-driven culture that proactively seeks out opportunities with data. The rise of citizen analysts is a key characteristic.

PEOPLE	Data team members and business stakeholders collaborate often.
PROCESSES	There are more processes to support data practices at scale, like data pipeline automation and data literacy.
TOOLS	Tools are flexible and cater to different skill levels. There is an experimentation platform for the data team.
CULTURE	The culture encourages viewing data as a product, and not just a performance tracking tool.

The path forward

To exit out of Proactive Analytics requires an investment in a more advanced data infrastructure and processes that support wide adoption of data and a proactive mindset across domain experts.

Stage Five - Democratized Analytics

Defining characteristics

The company uses data to inform nearly all decisions.
The majority of domain experts are also citizen analysts, and are active in ongoing experiments.

PEOPLE Most business stakeholders are citizen analysts, regardless of seniority level.

PROCESSES The company has a process for when and how data teams should invest in data applications and distribute access. Experimentation extends from the data team to the larger organization.

TOOLS Data discovery or knowledge-sharing tools that democratized data for the entire organization. Data applications are on the rise.

CULTURE The company's culture intertwines with data and views it as a critical asset.

Data Maturity HI & Audience (quick poll)

Stage 1:
Patchwork Analytics

Stage 2:
Departmental Analytics

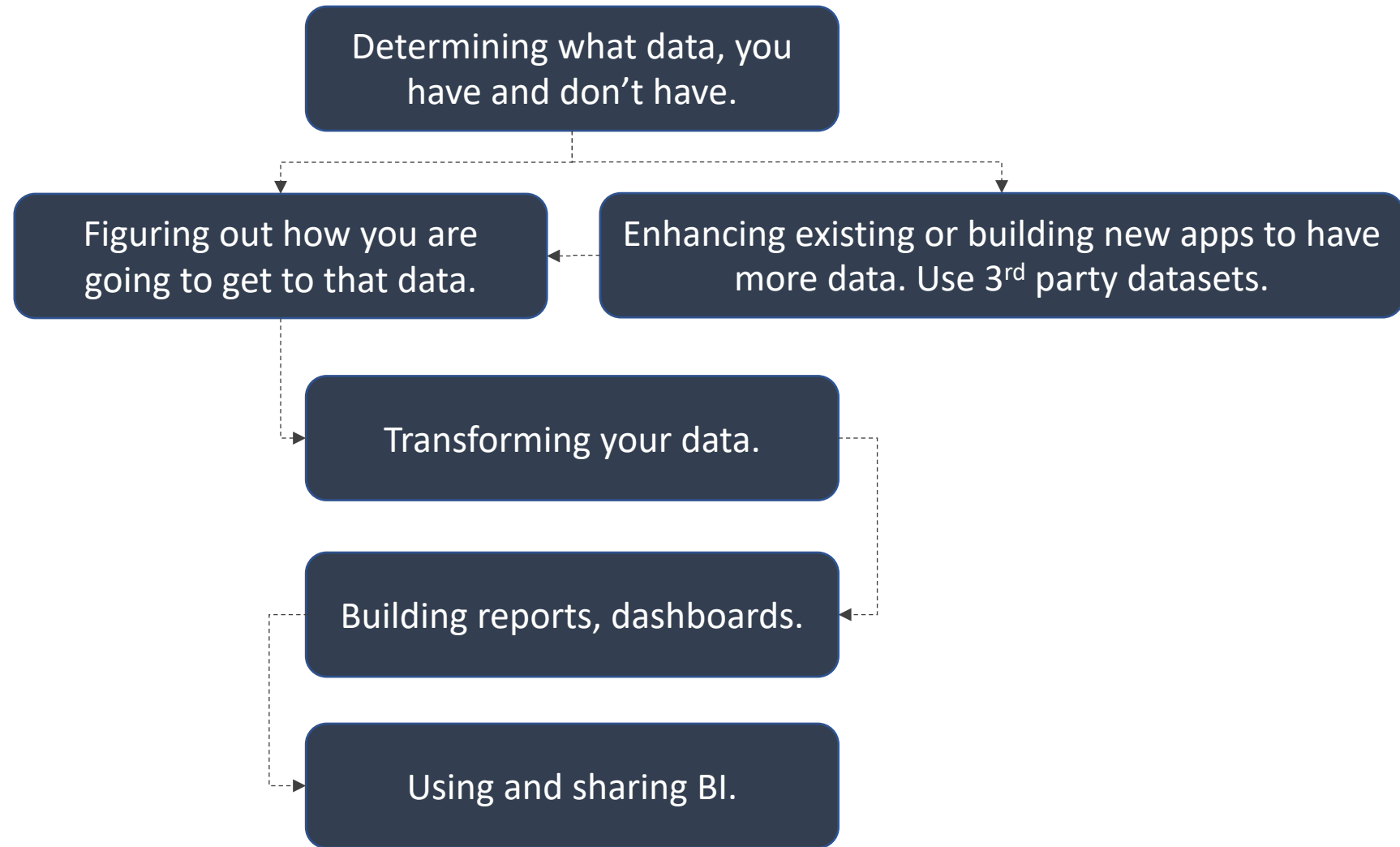
Stage 3:
Reactive Analytics

Stage 4:
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Stage 5:
Democratized Analytics



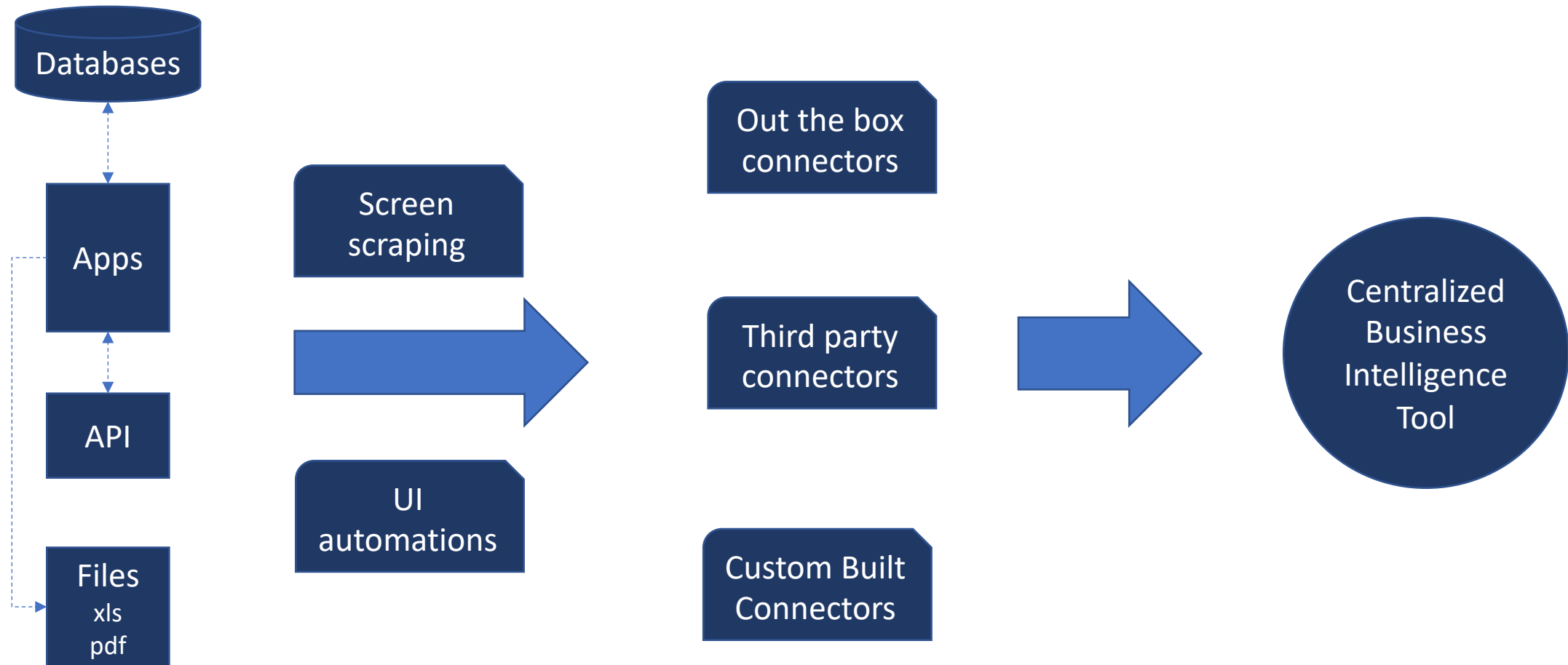
The Process – Key Steps



Your data universe – determining what you do and don't have

Core Activity	Process	Data Driven	Notes	Related Data Sources	Structured Data Sets	Un Structured Data Sets	Data points not captured into structured format	Data capture - accountability, accuracy and effort	Actions taken	Data needed in PowerBI ?	In PowerBI
Sales	Lead generation - capture and management of new leads	Yes		Salesforce.com	Salesforce leads and opportunities		Lead source	Sales team captures all leads, they are accountable for upkeep of this data. Once a year this is audited.	Sales director reviews open leads. Stale leads are periodically reassigned.	Yes	Yes
Sales	Lead generation - capture of all salesperson activities related to the lead	No	Sales team don't schedule meetings or capture outcomes of meetings in Salesforce.	Salesforce.com, Weekly lead activity emails to regional sales managers		End of week emails summaries > Monthly sales activity summary	Meetings, notes, emails, phone calls	Weekly emails are mandatory but the activity is not scrutinized or analyzed sufficiently. Monthly sales activity summary is time consuming.		No	No
Sales	Lead generation - capture of opportunities related to new lead	Partially	Sales team capture related product opportunities if client shows interest otherwise not captured.	Salesforce.com, Weekly lead activity emails to regional sales managers	Salesforce leads and opportunities		Opportunity details (if customer shows no interest), current supplier of product	Sales team captures opportunities relating to lead, after interacting with client. About 60% of team is doing this accurately.	Sales director reviews open opportunities in weekly sales meeting and in one on one sales meetings.	Yes	No

Getting to your source data



Getting to your data

File

- Excel
- Text/CSV
- XML
- JSON
- Folder
- PDF
- Parquet
- SharePoint folder
- SQL Server database
- Access database
- SQL Server Analysis Services database
- Oracle database
- IBM Db2 database
- IBM Informix database (Beta)
- IBM Netezza
- MySQL database
- PostgreSQL database
- Sybase database
- Teradata database
- SAP HANA database
- SAP Business Warehouse Application Server
- SAP Business Warehouse Message Server

Web

- SharePoint list
- OData Feed
- Active Directory
- Microsoft Exchange
- Hadoop File (HDFS)
- Spark
- Hive LLAP
- R script
- Python script
- ODBC
- OLE DB
- Acterys : Model Automation & Plannin
- Anaplan Connector (Beta)
- Automation Anywhere (Beta)

Microsoft Exchange Online

- Dynamics 365 (online)
- Dynamics NAV
- Dynamics 365 Business Central
- Dynamics 365 Business Central (on-premises)
- Microsoft Azure Consumption Insights (Beta)
- Azure DevOps (Boards only)
- Azure DevOps Server (Boards only)
- Salesforce Objects
- Salesforce Reports
- Google Analytics
- Adobe Analytics
- appFigures (Beta)
- Data.World - Get Dataset (Beta)
- GitHub (Beta)

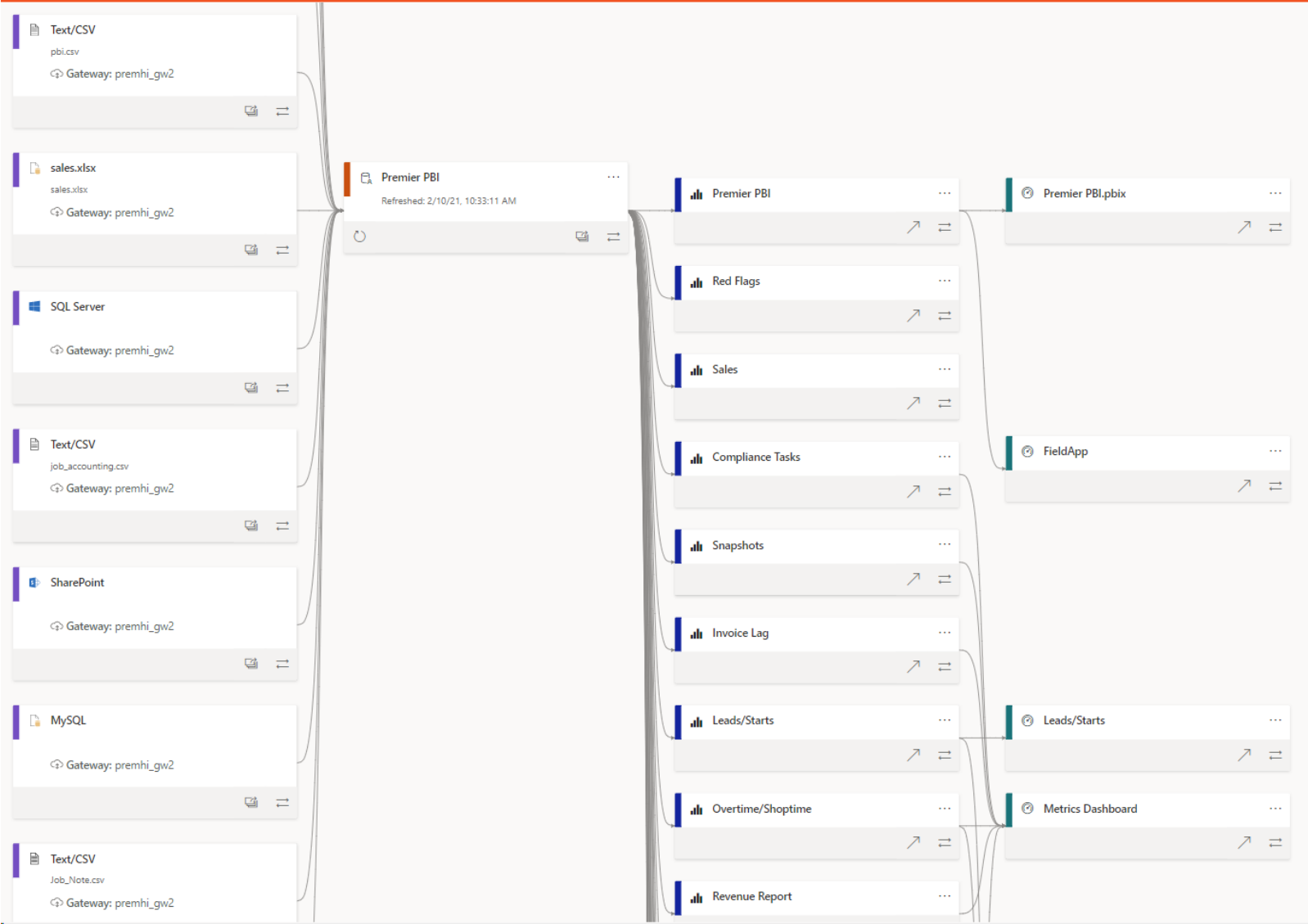
LinkedIn Sales Navigator (Beta)

- Marketo (Beta)
- Mixpanel (Beta)
- Planview Enterprise One - PRM (Beta)
- QuickBooks Online (Beta)
- Smartsheet
- SparkPost (Beta)
- SweetIQ (Beta)
- Planview Enterprise One - CTM (Beta)
- Twilio (Beta)
- Zendesk (Beta)
- Asana (Beta)
- Dynamics 365 Customer Insights (Beta)
- Emigo Data Source
- Entersoft Business Suite (Beta)
- eWay-CRM (Beta)

Cherwell (Beta)

- Cognite Data Fusion
- FHIR
- Information Grid (Beta)
- Jamf Pro (Beta)
- MicroStrategy for Power BI
- Paxata
- QubolePresto (Beta)
- Roamlr (Beta)
- Shortcuts Business Insights (Beta)
- Siteimprove
- Starburst Enterprise Presto (Beta)
- SurveyMonkey (Beta)
- Tenforce (Smart)List
- TIBCO(R) Data Virtualization (Beta)
- Vena (Beta)

Getting to your data – Premier Restoration



Transforming your data

- Data cleansing, scrubbing, and flagging
- Merging data
- Segmentation
- Creating relationships between data sets
- Measures and custom fields
 - Time series
- Clustering and other statistical and predictive analytics

Visualizations

Values

Add data fields here

Drill through

Criss-report

Off ☐

Keep all filters

On ☒

Add drill-through fields here

Fields

Search

Industry Groups

Inventory Categories

Inventory Turnover

Item Guru

Manufacturers

Markets

Open Purchase Orders

Payment Terms

Product EOM Balances

Product Movement

Product Movement Dates

Product Use Restrictions

Products

Sales

☐ Σ # Parent Accounts

☐ % New Cust

☐ Business Unit

☐ Cluster #

☐ Commision

☐ Σ Commision Rate

☐ Commision Value

☐ Committed

☐ Company

☐ Σ Cos

☐ Cust Retention Ratio

☐ FY

☐ GL Date

☐ GL Offset

☐ GP

☐ GP Clustered

☐ GP SPLY

☐ GP SPLY Var

☐ GP YOY Var %



Building and sharing BI visuals

