

# How to Integrate Data into your Business Analysis

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Bridge the Gap Between  
I.T. and Your Organization's Bottom Line

# Introduction



With the right business analyst, an organization can work much faster, stay agile, and maintain a competitive edge.

-The International Institute of Business Analysis

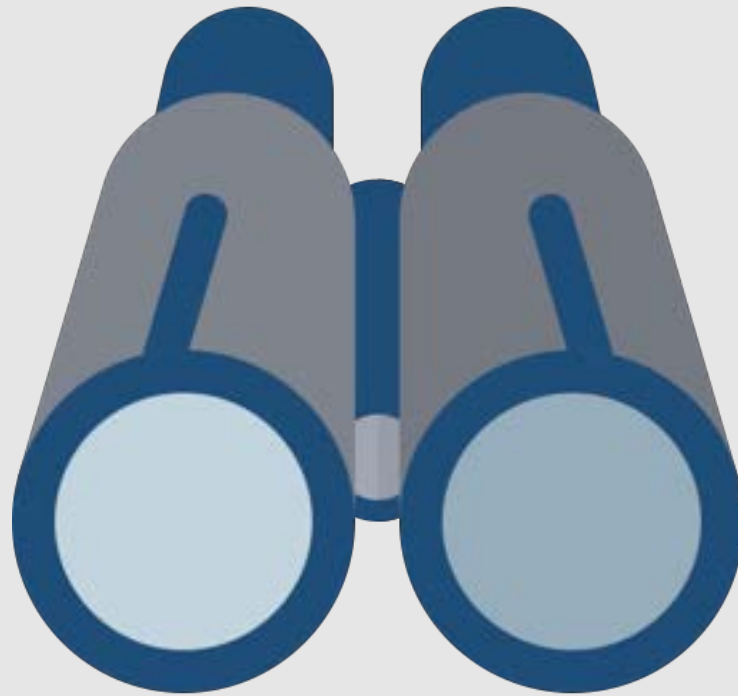


Data plays a critical role in developing solutions for your business. Backing your proposals with hard evidence, sharing useful findings, and objectively tracking the success and failure of initiatives requires integrating data into your analyses. But identifying, integrating, and systematizing data can present a challenge if you don't have a roadmap.

In this eBook, we'll cover why it's important to integrate data into your business analysis, how to identify and access the data you need, how to create building blocks to bring to every analysis, and how to use data to communicate results and measure your work.

## This eBook will help you:

- Chapter 1: Identify business needs
- Chapter 2: Define data needs
- Chapter 3: Create repeatable processes for analysis
- Chapter 4: Communicate your findings effectively
- Chapter 5: Measure the impact of your analysis



## Chapter 1:

# Identify Business Needs

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Determining which questions your organization needs answered and obtaining buy-in on your project are critical initial steps in the business analysis process. Data facilitates the development of your proposal and makes it easier to gain support from stakeholders.

# Chapter 1: Identify Business Needs



Needs are requests for change.

-Giorgos Sioutzos, BA Times



All business analysis projects begin with a needs analysis. You must define the questions that stakeholders in your organization need answered and consider how answering those questions will make a positive impact.

When approaching department heads and other key stakeholders to analyze needs and gather requirements, work to understand their needs and clearly explain your work's expected outcomes. Explain how your analysis will improve the organization's work and the bottom line, even if a process change may disrupt an employee's established workflow.

# 60-73%

The amount of data within an enterprise that goes unused for analytics

- Forrester




"Make an effort to bring people into the process so that they can trust the results of your analysis," said **Michael Laracy**, President of Rapid Insight. "Look for opportunities to make stakeholders' work easier. That's a quick way to establish your credibility and earn support for your projects."

## Chapter 1: Identify Business Needs

Bringing data to the table makes gathering strong requirements and gaining stakeholder buy-in easier. Data allows you to demonstrate that your proposals have evidence-backed merit and that you'll be able to objectively monitor the success of your initiatives.

A thorough, data-informed needs assessment sets a firm foundation for the rest of your analytic process.



Learn how TCI, LLC streamlined and automated processes to increase efficiency in multiple departments

[Read the case study →](#)



## Chapter 2:

# Define Data Needs

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Create a list of the data needed to bolster your analysis and make a plan to access it. Good data preparation is essential to reliable results.

## Chapter 2: Define Data Needs

When the business analyst has an understanding of the business processes and the data, there is a great opportunity to cross-check both areas. If there is a business process that uses (or produces) no data, the chances are it isn't a business process.

-Norman Thuswaldner, BA Times

The first step toward integrating data into your business analysis is determining what data you need to make your case or support your analysis. Take a step back and consider which aspects of your analysis would benefit from the support data offers.

If you're building a process to track service representative effectiveness, you'll need very specific internal data sourced from customer surveys and metrics like "average length of service call" or "number of emails required to resolve problems."

For competitive benchmarking, you'll need data on your organization's key performance indicators and data on your competitors' performance in the same KPIs. Often, this data is available in the form of anonymized, broad data on the industry as a whole; you aren't likely to be able to access an individual competitor's KPI data, so keep that in mind when setting expectations of what's available.

Compiling a list of "must-have" and "would be nice" data can guide your efforts in tracking down the data you need.

Next, you'll need to determine what data you have on hand. This may entail inquiries with the IT department, individual department stakeholders and employees, and searches for industry-wide data compiled by trustworthy sources.

## Chapter 2: Define Data Needs

Finally, you'll need to make a plan to access the data you require. If you're answering a one-time question that addresses a specific point in time, a static source like a spreadsheet or CSV file is likely all you need.

But suppose you're addressing an on-going business need or building a live dashboard for stakeholders to access. In that case, you'll need to connect directly to CRMs, databases, or other live data sources continually. You'll either need a formalized process that requires manual updating, or a **modern data tool** that accesses and processes the data on a scheduled basis.

"Keep in mind," said Rapid Insight Analyst Manager **James Cousins**, "it's critical to ensure that your data has integrity. As the adage goes: **garbage in, garbage out.**" If you use a CRM system, the data may have been entered differently by different departments or employees. And data from outside your organization might be less reliable. **Cleaning and preparing your data** to address blank cells, **outliers**, duplicate data points, and illogical entries will lead to trustworthy results.

### CONSIDER THESE STEPS:

**1.**

Survey the project's data needs

**2.**

Prioritize data needs as necessary or supplementary

**3.**

Inventory currently available data sources

**4.**

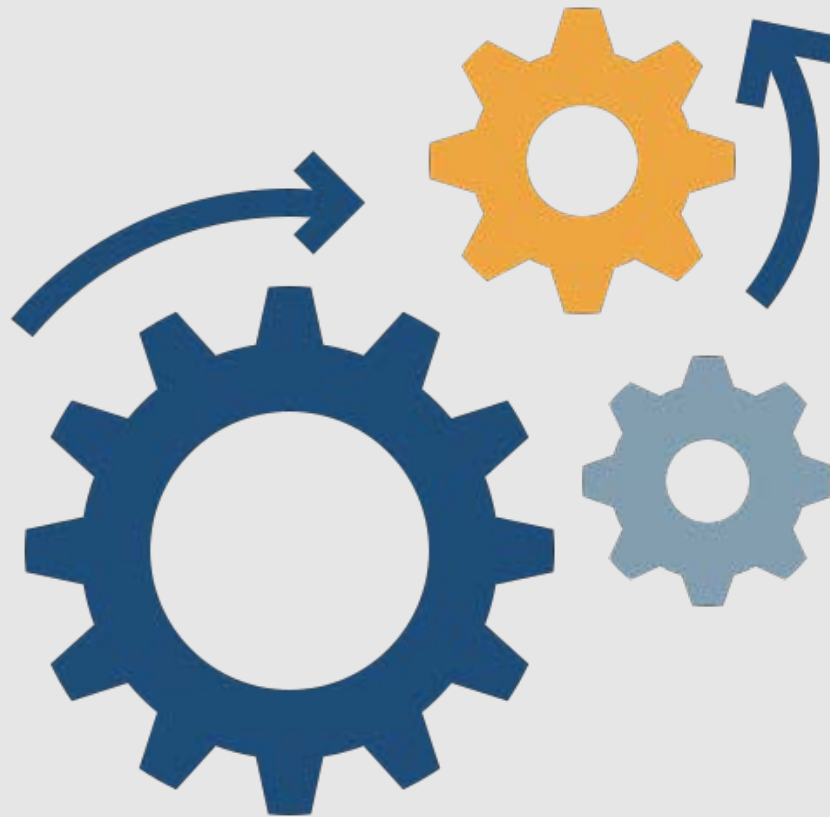
Plan for data access to ensure frictionless analysis



Ensure your data is clean, trustworthy, and reliable

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## Chapter 3:

# Create Repeatable Processes for Analysis

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Track your process as you integrate data into your work. Iterate and improve upon it to develop a blueprint for future projects. Create reusable “building blocks” for future analyses and data prep.

# 90%

Percentage of all currently existing data that was produced over the last two years

- Techgenix



The intent of your work as a business analyst is to improve and streamline your organization's processes and operations. Why not apply this same approach to your work with data?

While the initial journey toward fully integrating data into your work can involve a good amount of trial and error, each subsequent iteration should be smoother and more straightforward than the one that came before.

Following the steps in this eBook will give you a head start on developing your formal process. Still, every business and work environment is unique, and the steps you follow to access and implement data will be unique as well.

## Chapter 3: Create Repeatable Processes for Analysis

As such, it's critical to document the process you followed to access, prepare, and compile your data so that you can iterate and improve upon it each time you start a new project. If you can't explain where the data came from, it will be difficult for others to trust the results. Eventually, you should arrive at some key "building blocks" to reuse in future projects, and a reliable road map to follow when integrating data into your analyses.

**Data cleansing** is often the most dreaded, time-consuming step in bringing data into your work. Thankfully, modern data prep tools offer repeatable workflows that save your processes. These template jobs can be carried over to new business applications, requiring only slight modifications to cleanse and prepare your data automatically.



Learn to develop best practices and refine your data prep process

[Read the blog post →](#)



## Chapter 4:

# Communicate your findings effectively

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Ensure that the way you distribute data supports your recommendations and suits the intended audience. Presentations and ad-hoc reports offer immediate updates, while dashboards and automated reports offer ongoing insights.

## Chapter 4: Communicate Your Findings Effectively

When your analysis is complete, the next step is to determine how to convey your findings in the most suitable way for your audience. When laying out a formal solution or suggesting a process improvement, bolstering your proposal with data drives your points home. Likely, your solution will involve some combination of several of the options listed below.

When delivering a status update or setting a benchmark with your analysis, a summary presentation or an individually generated report will likely suffice.



For a more exploratory or open-ended question, a visualization or data dashboard might best serve the audience. These options afford a longer-term solution and more control over how the information is conveyed and received. Dashboards and visualizations communicate specific information in an easily-digestible visual format.

## Chapter 4: Communicate Your Findings Effectively

Automation is one of the most sustainable and beneficial improvements you can make to information delivery.

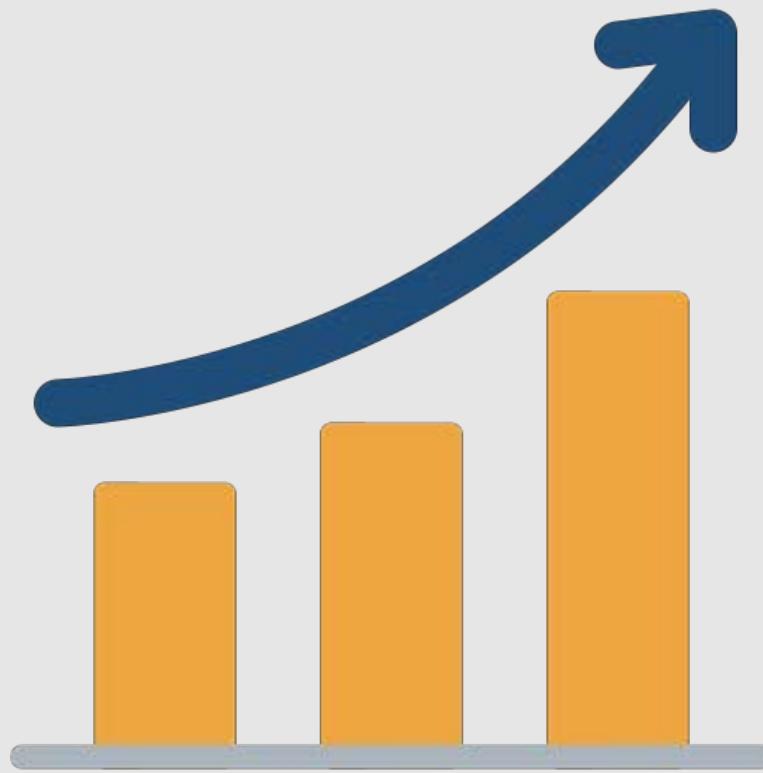
**Jon MacMillan**, Rapid Insight's Product Manager, said, "Automated reports, generated and distributed on a predetermined schedule, allow for hands-off, on-going information delivery. The impact of your analysis extends into the future with no additional work required once you've created your automated system."

Automation pairs especially well with **live data dashboards**, which equip stakeholders to obtain updates any time they want them.



Learn the secret to creating better Tableau dashboards in less time

**Read the blog post →**



## Chapter 5:

# Measure the Impact of Your Analysis

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Measuring an initiative's effectiveness against benchmark KPIs is an objective way to highlight successes and identify areas for improvement. Equipping stakeholders with access to live data gives your work continued relevance.

## Chapter 5: Measure the Impact of Your Analysis

Even when your business analysis project is complete and solutions are in stakeholders' hands, data still has a role in your work. This stage may be where data becomes most useful and productive.

The most critical question data can help you answer after your analysis is complete is: **what did answering this business question achieve for the organization or business?** Tracking your solution's impact with data equips you to determine objectively how effective your proposal was.



Nothing creates more positive momentum within an organization than a track record of successful projects. But if we don't stop and assess the value created by the solution; how do we know if we are actually operating from a track record of success?

-Laura Brandenburg, *Bridging the Gap*



You can often use the same KPIs and metrics gathered during your initial analysis to set performance benchmarks. Then you can compare your benchmarks against current performance to see if your solutions had their desired effect.



# 67%

of business executives say they are not comfortable accessing or using data tools and resources

- Deloitte



Measurement and tracking with data allows you to refine and improve your solutions on an on-going basis so that, even if the initial solution did not succeed, you might be able to fix it rather than scrapping it altogether.

Additionally, putting data in stakeholders' hands with dashboards or scheduled reports is often part of a lasting solution to a business problem. Continually delivering data to decision-makers allows them to uncover lessons beyond what the initial project sought to find and sparks ideas for future improvements and analyses.

When data is a core component of your business analysis, the benefits of your work persist indefinitely.

## Conclusion

Properly integrating data into your business analysis equips you to back your proposals with objective support, forecast critical business outcomes, and offer continued insight to stakeholders through reports and dashboards. Cohesively incorporating data into your analyses takes effort on the front-end, but it has lasting benefits that extend the value of your work indefinitely.

The right tools simplify the process of preparing, exploring, and sharing your data, allowing you to develop better solutions in less time.



Aside from being one of the most powerful data tools on the market, Rapid Insight is backed by an astounding team of professionals who understand the software and will jump through hoops to solve any puzzle thrown their way.

-Nick Myers,  
Director of Information Technology  
at E.L. Hollingsworth



Rapid Insight's powerful tools and expert live support equip every business analyst to integrate data into their work. Organize and cleanse your data, predict your organization's key outcomes, and prepare everyone in your organization to access the data they need to do their best work.

Ready to make your  
business analysis more  
efficient and effective?

Get a personalized walkthrough of  
Rapid Insight's data tools today →



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