



Case Study: Building a Workforce Analytics Program – Crawl before You Jump

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Workforce analytics offers the thrilling potential of uncovering a seemingly endless array of critical insights that could positively impact the business. Starting your own program, however, can be daunting, or even downright overwhelming, especially if you're diving into this space for the first time, and like many others, are unsure where to begin.

Technology companies and consultants all sing from the same song book when it comes to the “big data” revolution and predictive analytics. You might hear about it so much, in fact, that it's easy to feel as though you're behind the curve if you haven't already built a data-mining strategy complete with pricey investments in high-end analytic capabilities. The problem is, if you jump before you crawl, you're more likely to land on your face than on your feet, with a big hole in your budget to show for it. Sure, you might be the new owner of some very cool technology and a plethora of metrics you didn't have before. But, without an understanding of how to make the most of either, or even know if they're the best for your business, those alone won't take you far. Instead, you need to flip the process on its head and start with business needs, then let technology follow.

How do you do that? In this article, I lay out how you can build the necessary foundation for your analytics program through project work – specifically intended to use analytics to solve business problems. I'll walk through why projects give you a unique advantage to getting off the ground, who you need to partner with to ensure success, and how to translate your learnings into key technology needs to build a more robust and sustainable program.

Project Work: A Hidden Advantage

The entire premise of this approach is that you are learning by doing, building upon every experience, and working little by little to embed an analytics mindset into the culture. Each project – whether you are working to understand the causes of turnover within your high-potential population, predicting success of new hires, or defining the characteristics of an effective manager – must begin with a business issue or challenge that needs to be addressed. As you move through the various stages of the project, you will be given ample opportunity to interact with different parts of the business, build relationships (and allies), find and gather data, develop measures of success, and create plans for follow-up. These essential elements will eventually form the pillars of your custom analytics program and the foundation of your success.

Develop a Network of Advocates: Promoters and Champions

Through the application of your projects, you should be connecting with a number of individuals across the organization who you may not normally interact with. While you need to use this opportunity to get as many diverse perspectives as you can on the immediate work at hand, you also owe it to your future analytics program to start the broader conversation now. Be sure to frame this particular project as only a piece of the larger analytics puzzle. You should be planting these seeds early and often, as this will be essential to the program you hope to build in the future.

In addition, think deeply about which leaders will be important to the long-term success of your program, e.g., business intelligence, IT analytics, marketing, and reach out to them for their thoughts on your approach to the current project. Using this as a conversation starter may not provide all of the answers for the work at hand, but it usually goes a long way toward building critical relationships. The old saying, “it never hurts to ask,” is fully applicable in this situation. Very rarely have I come across a colleague who did not care to provide a perspective, and through that interaction, we opened the door to future discussions about any number of related topics down the road.

During these interactions, you should also solicit feedback on their current challenges and possible solutions that you can potentially help them explore. Ask about the broader organization's challenges and where they see the biggest opportunities for analytics to have an impact. Take advantage of these moments to spread the word, spark interest among colleagues and build an audience. Your supporters will be crucial as you expand and continue to look for opportunities to deliver analytic insights across the organization.

Project Partners

Just as you will foster relationships across the organization, in order to build awareness and learn from others, you will also need to define and develop strong partnerships. Make no mistake; partnerships are different from other relationships you will be building. These are the people who will be in the trenches with you getting the real work done.

HR business partners (HRBPs) are often your on-the-ground support throughout the process and can be particularly impactful at the early stages of a project. They know what the business is working on, can help set up the initial conversations, and provide history and context that you may not otherwise have. You need to fully understand how the business got to where it is today and what is happening on the front lines to approach the issue with the most accurate information and ensure credibility. Additionally, when deciding who in the business should be involved, HRBPs can help select individuals who have championed HR on past projects or are frequent consumers of talent-related data. Getting started is much easier when you are working with a leader who supports your cause and is willing to roll up his or her sleeves to solve the problem with you.

Further down the line, the HRBPs can assist in understanding how to interpret results, guiding discussions with the business by drawing on insights from the data, and encouraging action planning based on the outcomes. As a note, HRBPs often lack basic data analysis skills and, therefore, you will need to work closely with them on this portion. Over time, though, these skillsets will improve and you will move from a teacher to an advisor. This is a natural progression that signifies important progress towards an analytical culture. Finally, as interventions are implemented and measures are defined, the HRBPs can monitor progress, keep abreast of changing business needs and conditions, and help make necessary adjustments to the plan as is suitable for the situation.

In the same way HRBPs offer invaluable support from a high-level perspective, there are members of another group that will become essential partners, offering views from the heart of the business. Most often these individuals are mid-level managers who are running everyday activities. Ultimately, these individuals will be the analytics enablers or inhibitors because they influence colleagues and subordinates, as well as leadership. They are also on the frontlines, ensuring their teams are successful and operationalizing those strategies that have the biggest impact on the organization's performance. These close ties to business results mean that they are senior leadership's eyes and ears on the ground. As you build their trust, you build senior leadership's support.

Throughout each project, you will be in touch with different management teams, each one with a unique world view. Experiencing these differing perspectives will expand your own view and allow you to take a more

holistic approach to the analytics work. This will deepen over time and result in increasingly complex and well-informed analyses.

Better Together – Partners in Data

I know it's starting to feel like you have to build an army of support and partnership to get through a project, much less build an analytics program. But frankly, you do, albeit a small one. However, some partnerships are more valuable than others, and one that will be especially important as you move through every phase of your analytics journey is that of the "business analyst/data owner."

This person, after all, is your connection to the operational side of the business and, of course, the hard numbers. Look to them to learn about the work they are doing, which will help you understand what data is important for running the business. Share your vision of workforce analytics and be sure to clarify how you see them fitting into the bigger analytics picture. At a minimum, you will need access to their data, but depending on how the interaction goes, you may find a kindred spirit to join you on your analytics endeavor.

A note of caution: not all business analysts will care to help or be able to grasp what you are asking, since it may not be directly related to their daily work activities. It's important to prepare talking points and a storyline to help analysts understand why you are reaching out and what you hope to accomplish. One thing I've found is that data owners are generally very technical folks whose creativity is underutilized. They become so inundated with cleaning data, managing requests, and reporting that they don't ever have time to think creatively about the information they are processing.

Ask them for their help in figuring out how you can utilize the operational information to analyze your particular problem. Hopefully, this will be a welcome shift from their rote activities and will awaken the innovator from within. If this happens, you will have an invaluable ally. For future considerations, as the work expands, you can begin to outline what an analytics center of excellence may look like. You can then utilize your group of innovative business analysts to continue to develop ideas, provide guidance on projects, and define an analytics strategy for the organization.

Harnessing Your Data

As you dig into the business issue, think about how to address it. As you learn more from your project partners, you will start uncovering what data is available and what data is important, and therefore, useful. These are not necessarily the same. There is significantly more data in your organization than you will ever need. Thus, being able to determine what is actually useful will become a required skill. Throughout your project work you will be able to

explore where that data sits, who owns it, how you can gain access to it, and how it's used in other parts of the organization. You'll find operational data, benchmarking data, surveys, external research, marketing data, etc., – all of which may play a role in helping you uncover the insights to initiate impactful change.

Consider three basic questions as you acquaint yourself with this new information – how was it collected, is it reliable, and what does it tell you? Think about how data points might correlate with one another. If there are opportunities, flag them and consider following up on a possible exploratory analysis later. As you move through this activity, you should also be taking notes on what data you are finding, where it lives, and how it's currently used. Over time these notes become your data dictionary and will be used as a reference during and after each stage. When you do get to the point of implementing a data warehouse or Software-as-a-Service (SaaS) application, this information will be crucial to understanding exactly what your needs are.

Applying What You've Learned to determine True Technology Needs

You've finally made it through a few projects and you've learned a lot. The data dictionary is starting to fill out and there are metrics that are being tracked. Human Resources' skillsets are expanding and you've moved beyond descriptive statistics and are looking at correlations or regressions (because you inspired those analysts). The business is seeing results from the work that's been accomplished thus far and its leaders are interested in more, but you're running out of bandwidth. Now may be the time to begin to consider how you might be able to leverage technology to continue to expand your capabilities.

What are your requirements for this technology? Luckily, a significant portion of the work has already been done. You are going to want to be sure that you can continue to track and measure the success of the projects already completed. This means that the tool should either come with these measures out-of-the-box or have the capability to customize. This also means that the tool needs to be able to integrate all of the wonderful data you've been collecting from all your various sources – the data dictionary is your guide here. Don't limit this activity to your current and past project needs; you should have captured data elements that were not immediately critical for a project, but had potential to add value in the future. One of the worst things you can do is replicate the work you've already done without the capacity to expand, which is one of the key points of the technology.

Next, you'll want to explore the technical expertise of the desired user base. You should also have a good sense

of this. More technical organizations may decide to invest in a tool that requires computer programming with infinite customization, while the less technical group might select a pre-built solution without much customization. Luckily, there are so many options in this space that the entire spectrum is available, and you should be able to find something that pushes the boundaries of what's possible without being so complicated it can't be used.

Throughout this exercise, you will need to make concessions. It is unlikely that the perfect tool for the perfect price exists, but armed with all of the knowledge you've gained, you will be able to make the most informed decision.

Conclusion

Hopefully, you can see that big, fancy technology may have a place, but only after you truly know what you and your organization need. This is an effective approach that gets you moving in the right direction immediately. By doing good work with your colleagues, experimenting through projects, and staying focused on the business, you will lay the groundwork for sustainable success. Build strong relationships, make friends with people across the organization, document, document, document, and most importantly, have fun while you're doing it.

Once you're ready to build a comprehensive program, you will have lots of support and the confidence to rally that support around the "best product," based on your extensive knowledge and proven expertise.

About the Author



Blaine Ames is the talent analytics leader at CSAA Insurance Group, a AAA insurer, in Walnut Creek, California, where he is tasked with building and executing the company's workforce analytics and planning strategy. He started his career as a Neuroscience Research associate at the University of Colorado, where he honed his statistical analysis and research skills. He leveraged that training upon entering into the human capital space in New York where he worked in various capacities across talent and organizational effectiveness in non-profit, health care and finance. He is passionate about understanding the critical and unique role that individuals play in the successful execution of business strategy, and how we can all incorporate data into our daily decision-making. He holds a B.A. in Cognitive Neuroscience from UC Berkeley, and an M.A. in Industrial/Organizational Psychology from NYU. He can be reached at blaine.ames@csaa.com.