



**cynozure.**



**Service Definition Document:  
Cloud Data and AI Strategy  
and Planning.**

# Contents.

An introduction to Cynozure.....	4
Service Summary.....	6
Implementation Plan.....	8
Ordering and invoicing.....	16
Pricing.....	17

# Hello

## Levelling up outcomes, capabilities and creating **data guided organisations** with pace, agility and certainty.

We're a **people powered data and analytics strategy company** with a mission to contribute to a better future for all through the open and positive use of data. We believe passionately in the potential of data to transform organisations and their customers.

We have built a business focused specifically around defining and delivering transformative data strategies that help organisations deliver incremental value and the capabilities required to do that. We do that through six service pillars:



We have helped over 60 organisations improve their skills, data organisation design, data governance, culture, technology solutions, data products, operating models and all with the aim to improve decision-making and strategic outcomes.

We have done this across a wide variety of industries including Central Government, Local Government, Retail, Financial Services, Insurance, Media, Entertainment, Technology, Not-for-profit and Property companies. We believe cross industry experience in data and digital is vital for Government and Local Authorities looking to build data strategies that support their strategic priorities.

We are a delivery-centric organisation. That is, we are very focused on actions and getting things done. We hit the ground running due to our specialism in data and analytics and our experience as industry practitioners.

We have quick start frameworks, best practices and accelerators that mean we don't need to reinvent the wheel each time. We collaborate and take joint ownership for your outcomes. We also have a broad and deep team of industry leading capability.

Joe Nathan, the VP of Data and Analytics at one of our clients, RS Components said this about a project we recently completed. "We got it all done. The project was delivered on time and on budget. In just nine months, with a skeleton team, everything required was delivered. And we know that the business is happy with the results."

Sharing knowledge and passing it on to others is a bedrock of our culture and approach. This is evident from the treasure trove of help, guidance, best practice, approaches, methods and lessons we share through blogs, videos, masterclasses and whitepapers that we produce and share. This is all aimed at helping individuals and organisations to level up their data game.

We run Masterclasses in the areas of Data Strategy, AI, Building Data Platforms and DataOps and have trained 1000s of people in 100s of organisations through these sessions. These workshops have been so successful that we are regularly invited to run them for industry leading technology vendors and their own clients including AWS, Alteryx, Google, Tableau and Snowflake.

We also continually produce thought leadership pieces which can be found here: <https://www.cynozure.co.uk/resources/>.

Our leadership team are also involved with City University of London to help develop pragmatic and commercially focused Data Science Course material. We're on the advisory boards of CogX and Big Data LDN, two of the UK's leading data and AI events, to ensure that the market leading events are creating content that organisations like Battersea will find meaningful.

The reason our clients choose us is because we have their people at the heart of what we do. This has all given us an intimate experience about the challenges that companies face when considering how to unlock the value that sits in data.

# Service Summary

**A powerful methodology that ensures all bases are covered with a focus on business outcomes and clarity on the journey for your Cloud Data and AI Strategy.**

Our experience of implementing transformational change is that there is a journey organisations need to go on. We have seen that there are some common stages required in order to have a successful change journey.

The idea of this Cloud Data Strategy and Planning exercise is to develop a robust, pragmatic and achievable roadmap for moving your data platform to the cloud and assuring its success.

Because of this we developed the 'Level Up Framework'. A tool for transforming an organisation's ability to deliver incremental value and improvements in its capabilities around data and analytics. It consists of a roadmap of activities and a process for measuring maturity, capability uplift and business value.

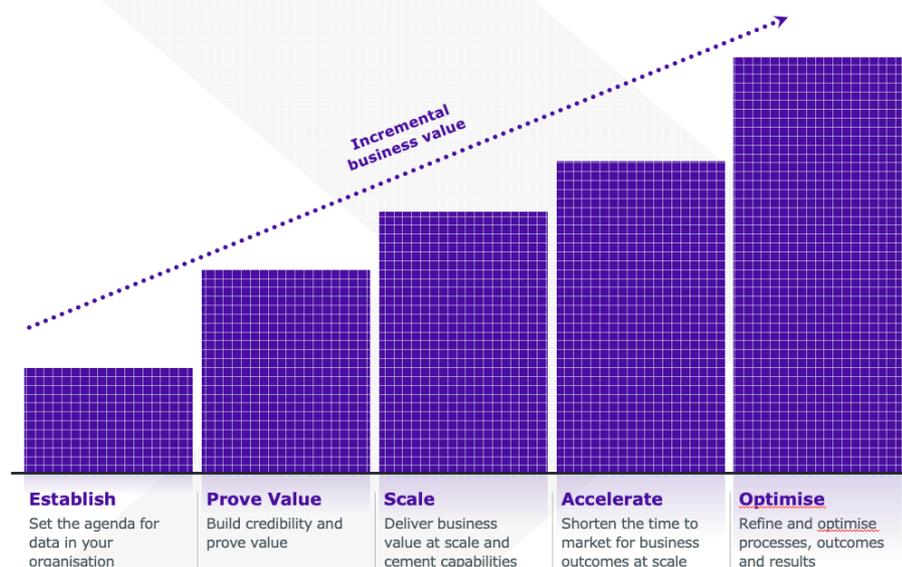
## The Level Up Framework® - add value & improve capabilities

**The Level Up Framework® is designed to help you consistently and incrementally add value and improve capabilities through your journey.**

Successful data strategies are implemented by knowing where you are and where you are going. There is a consistent journey that we see time and time again across organisations.

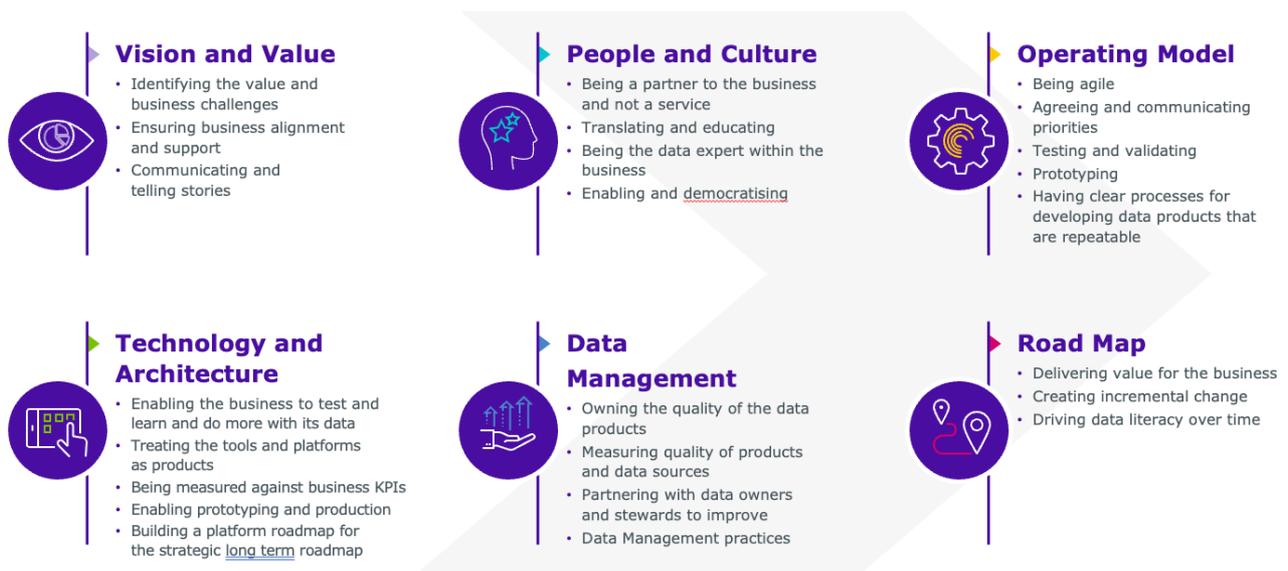
By planning the journey against a clear framework of improvement it helps to ensure you are consistently, incrementally and predictably adding value.

The framework also allows you to plan the development of your core capabilities incrementally, in the right order and at the time that is right for where you are on the journey. Simply put, you invest in the right things, at the right time and aligned to the business value being returned.



In order to punch through to the next stage, certain outcomes need to have been met or organisations risk stuttering their progress or failing. At each stage the focus is on delivering incremental value and just the right amount of capability required to move through the stage and be ready for the next.

To further support this, we developed a model for defining and planning a cloud data strategy that identifies your capability gaps, changes required and is business outcome focused. It helps develop a roadmap for moving through the Level Up journey and driving the change needed. We call this model the '6 pillars of a data strategy' as defined below:



More about this framework can be found here:

<https://www.cynozure.com/insights/the-pillars-of-a-successful-data-strategy-on-demand/>

During the process of defining a cloud data strategy or any deliverables we grab early engagement with stakeholder teams to engage, educate and empathise that helps to build buy in for what you are trying to achieve and therefore the change journey. All our projects deeply involve the organisation we are working for and all the individuals are vital in making the outcome a success. As part of our projects we ensure that there are regular playbacks, show and tells and other communication with key stakeholders to make sure their input and opinions are heard.

Our team is made up of leaders with industry experience managing and leading transformational change. For example, the ex-Chief Data Officer for the British Army, Head of Data at M&S, Head of Personalisation at ASOS.

# Implementation Plan

## Our methodology for creating your Cloud Data Strategy and Plan.

Our core methodology can be purchased in three sizes depending on the needs of your organization.

1. Small – Up to 10 business interviews, 1 workshops and 30 people completing the Scorecard.
2. Medium – Between 10-20 business interviews, 3 workshops and 50 people completing the Scorecard.
3. Large – Between 20 and 30 business interviews, 3-5 workshops and unlimited people completing the Scorecard.

## Our approach.

There are 3 main steps to our approach to look to get under the skin of the organisation and make recommendations for what you should do and what the plan should look like.

### **Step 1: Discover and learn**

We will spend time with a range of people in the organisation understanding the current Departments strategy, data strategy, business needs, current activities/programmes, current set up and future plans.

It is important we get 'Stage 1 - Discover and Learn' right as it drives our ability to properly advise on strategy and roadmap as we are getting under the covers of the organisation from a business, data and technology perspective.

## Step 2: Recommend and iterate

Based on the information captured and reviewed as part of the Discover and Learn stage we will synthesise and triangulate what we have found out internally within the Cynozure team.

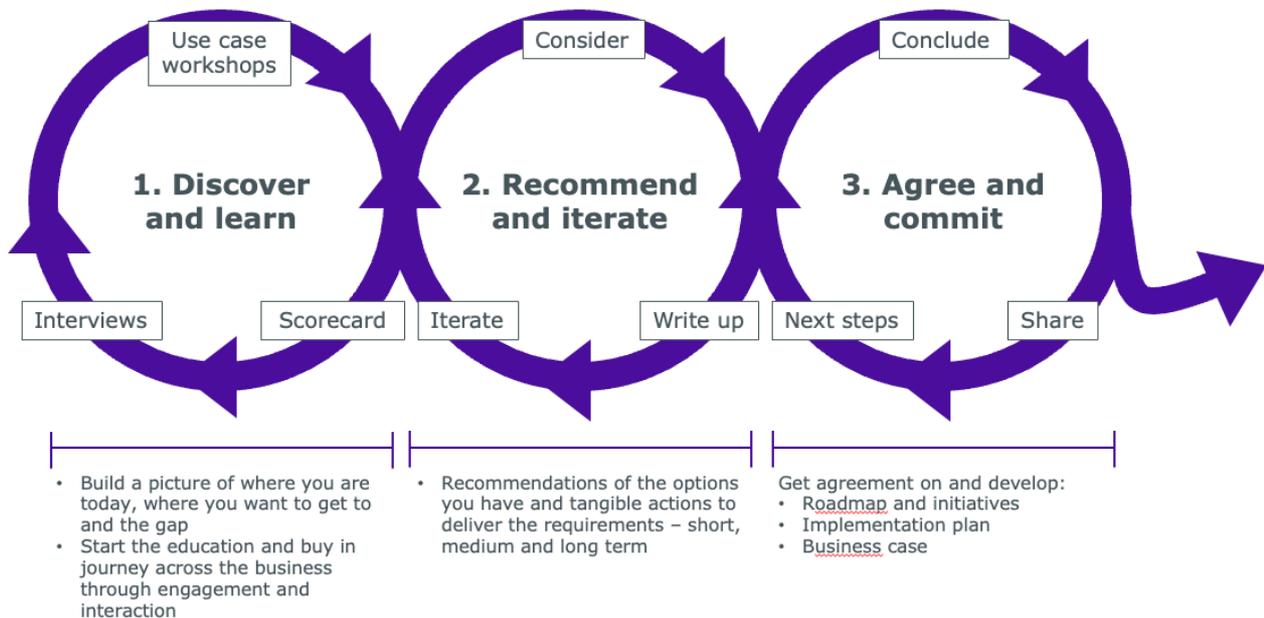
From here we will order our ideas, thoughts, options and recommendations into a very early rough cut set of recommendations that we will play back to a very small stakeholder group. We will be looking for feedback and critique which we will then use to further develop the strategy and recommendations. We may look to iterate this a few times as conclusions are finalised.

## Step 3: Agree and commit

Once we are happy with the draft strategy, recommendations and roadmap we will provide a summary document and a detailed write up. We'll complete two or three stakeholder playback sessions to get everyone aligned around the plan and agree approach to taking it forward.

We add any final feedback, polish and handover a final edited output.

The diagram below summarises these stages.



# Step 1: Discover and Learn.

## Business interviews

During this stage, we use a series of 10-30 (*number to validated with you depending on size of Data Strategy required*), sixty minute interviews conducted with a range of people across the business from senior leadership to front line staff. We'll be looking to make sure we understand and can capture the following:

- Understand relative priorities across the business and biggest business wins
- Meet and understand opportunities and challenges with data and analytics
- Analytics capability and knowledge across the business

We recommend meeting the following people for interviews:

- Representation from senior business team to articulate the business strategy
- Representation from department heads to articulate the current projects, operations and focus for delivering the business strategy
- Data and analytics teams to understand projects, challenges and opportunities.

## Use case workshops

We will have 3 – 4 (*number to be validated with you*) workshops to answer the question "What do you need to know and why?". To do that we would bring together people from across the business to identify key strategic themes, use cases and business questions that support delivering the business priorities, outcomes and biggest wins.

This usually pulls out the following:

- Strategic focus areas, use cases and business questions
- Priority data sets
- Blockers and challenges that could impact feasibility of these outcomes

## Technology and data review

We need to understand the technology strategy in order to ensure it aligns to the rest of the data strategy and make relevant recommendations on tools, architecture and integration. Therefore, we'd be looking to understand the following through a few meetings:

- Wider technology strategy and landscape, specific data tools, solutions, architecture and platforms existing today
- Data and analytics solution development and delivery methodology
- Process for capturing and delivering business requirements
- Ability for existing data solutions/technology to support the outputs of the business interviews and use case workshops
- Approach to integration

## Documentation / other input

So we can build on what you already have and documented we would like access to the following types of inputs:

- Business strategy
- Data strategy work to date
- Terms of reference from any existing data steering groups
- IT strategy documentation
- Previous audit outputs
- List/explanation of current/recent projects

Learnings from Stage 1: Discover and Learn feed into the outputs created and finalised during the 'Recommend and Iterate' and 'Agree and Commit' stages.

## Step 2: Recommend and Iterate.

The major element of the output is the write up against each of our 6 pillars mentioned earlier. This is combined with an assessment of where you are on the journey and your current capabilities. This will be started, iterated and finalised through the 'Recommend and Iterate' and 'Agree and Commit' stages.

### Capability assessment and mapping

Assessment of maturity across the critical elements (6 pillars) of a data strategy.

Assess and score current maturity across multiple key capabilities needed for a successful outcome.

We will potentially score that against a benchmark maturity in your industry (or scale of company) but certainly against a future aspirational score based on appetite and desire from the organisation.

This is not one of the pillars of a strategy but acts as a leveller and guidance on direction required and what gaps need closing.

### Level up framework mapping

Assessment of where you are on the journey.

Assess where your business is on Cynozure's 'Level Up Framework' and agree where you are looking to get to over the next 3 – 5 years.

This will be used as a reference point to help build your roadmap for delivering incremental value and improving the capability scores from the capability assessment.

## **Pillar 1: Vision and Value**

Articulate a vision and business use cases that frame data's role in delivering the business strategy.

Vision statement aligned to the overall business strategy (such as 'use insights and facts to better collaborate with our stakeholders and ensure we reach more citizens)

**Summarised** and **prioritised** business focus areas and use cases (such as increased donations, personalised communications, site efficiencies and so on).

This will come from a combination of the interviews and outputs of the use case workshops.

## **Pillar 2: People and Culture**

Identify the key skillsets necessary to be successful at implementing the strategy and how to organise them.

Key roles and responsibilities required and assessment of size and appropriateness of current capabilities, as needed.

Recommend organisational structure for data and analytics delivery and exploitation.

Comment on ensuring cultural shift to a data guided approach, literacy and buy in across the business and its stakeholders.

## **Pillar 3: Operating Model**

Recommended ways of working for executing against the strategy and delivering the desired outcomes.

Recommended approach to defining, delivering and managed the data requirements capture, prioritisation, delivery, exploitation and tracking of data solutions and outputs.

This covers technology to data teams and data teams to business teams (internal and external) and how this is governed, steered and facilitated across the business.

## **Pillar 4: Data Governance**

Determine priority considerations and processes required to ensure data integrity and trust.

Identifying priority policies, best practices and processes that need to be put in place or refined to support data governance. Covering grouped and prioritised data sources required for reporting, business intelligence or analytics.

It also covers current issues being faced and how they could be mitigated and how you enhance the usability, traceability and integrated nature of data.

## Pillar 5: Technology and Architecture

Review the current end to end technology platforms/solutions in terms of their ability to support the vision and use cases.

Make recommendations on current technology choices for data and analytics solutions and detailed recommendations on high level architecture, components and design approach. **Note: we are independent of any single technology vendor so our recommendations are made based on best outcomes for you.**

## Pillar 6: Roadmap

Recommended plan and investment requirements for implementing the strategy.

Provision of a phased timeline for moving through the phases of the **Level Up Framework** showing how to implement the strategy and recommendations.

Some of the diagrams used previously to represent the requirements above are shown below. This is a sample and may or may not be used in the final outputs.

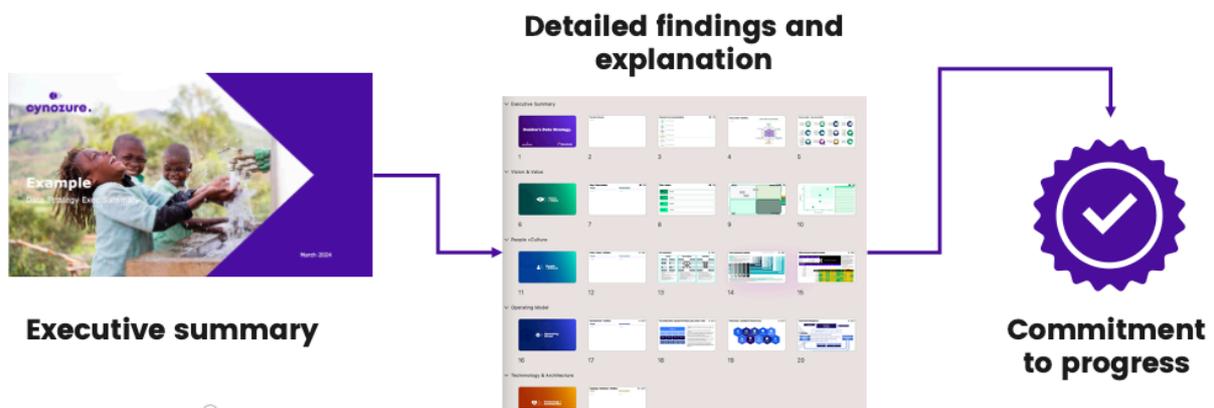


## Step 3: Agree and Commit.

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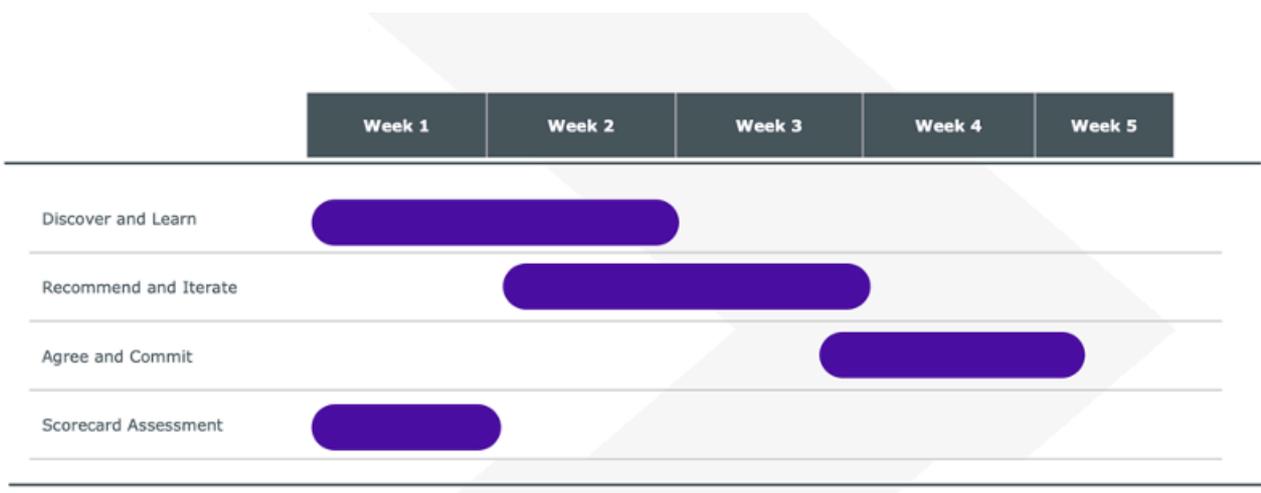


## Cynozure 3 step timelines.

We aim to carry out short, sharp and focused exercises using small teams (2-3) of senior and experience consultants. We understand the organisation quickly and synthesise what we've heard into a strategy and set of recommendations with pace and care.

With efficient scheduling of interviews, playbacks, reviews and close down meetings we are able to complete this exercise within 4 - 6 weeks for a small Data Strategy exercise. For a Medium Data Strategy, we would typically allow between 6-8 weeks and for a Large Data Strategy, 8-10 weeks.

The image below shows a high-level plan which works out roughly 2 weeks for Discover and Learn, 2 weeks for Recommend and Iterate, 2 weeks for Agree and Commit. This is however largely driven by the scheduling of the various interviews and doesn't take holidays or other such impediments into account.



# Ordering and invoicing

## Approach for ordering and invoicing the Cloud Data Strategy and Planning exercise.

### Ordering

The following steps can be followed to order this service:

- 1) Buyer to decide and agree on the preferred route of engagement for the exercise
  - a) hands on approach or b) facilitated workshop approach
- 2) Buyer and Cynozure to discuss and agree the number of interviews and/or workshops required to ensure full stakeholder engagement
- 3) Buyer and Cynozure agree commercials
- 4) Cynozure to create Statement of Work (SOW), from template shown with our Terms & Conditions (T&Cs)
- 5) Buyer and Cynozure agree SoW and T&Cs

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