



# Data for Government: Crawl, Walk, Run – Part 1, Crawl

April 25, 2024





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# Today's Presenters



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# Data Analytics: Crawl, Walk, Run Series

- **Crawl – Today**

Creating Your First Dashboard

- **Walk – July 25, 2024**

Data Warehouses, Data Lakehouses, and Your Data Estate

- **Run – September 12, 2024**

The Power of Predictive Analytics and Artificial Intelligence



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# How CLA Digital Can Help You...



## Software *integration*

In-house products and solutions allow businesses to leverage leading value.



## Data *modernization*

Every business relies on data insights to make accurate informed decisions.



## *Automation* development

Adding automation to key processes allows businesses to scale efficiently.

Protect your systems and data with a strong *cybersecurity* plan.



# Client Lifecycle: CLA Digital

## Phase 1

No dashboards or manually compiled dashboards  
Disconnected data  
Abundance of manual processes

## Phase 2

Automated dashboard for one or more departments  
Analytics supported by data integration and automated workflows  
Exploring artificial intelligence for productivity

## Phase 3

Most departments supported by automated dashboards and self-service BI  
Defined sources of truth across enterprise  
Exploring machine learning for analytics

## Phase 4

Integrated systems and solutions supporting advanced analytics  
Machine learning and artificial intelligence integral to business decisions

Crawl

Walk

Run



# Polling Question

Where on the lifecycle do you see your organization?

- Phase 1: Mostly manual, disconnected systems, not easy to pull data, limited dashboards
- Phase 2: Starting to integrate systems, some dashboards
- Phase 3: Integrated environment, robust dashboarding and reporting, Self Service analytics, using AI for productivity
- Phase 4: Fully Integrated environment, using AI and ML for multiple business decisions
- I'm not sure







# Leveraging Your Data to Provide Effective Insights



# The Vision

DATA



SORTED



ARRANGED



PRESENTED VISUALLY



EXPLAINED WITH A STORY



# The Challenge

**Many companies struggle to access and organize the information they need to make timely decisions.**

## Software Sprawl

Best in breed software, mountains of data, how to take advantage?

## Pressure to do more with less

Short staffed, budget constrained, need “good enough” solution

Competition for resources and talent makes digital capability a cost of entry

## Everything is Manual

Multiple disparate systems, murky process, requires “reinventing the wheel” every time anyone needs data

Seemingly endless cycle of manual reporting exhausts staff

## Lack of Clarity About What Data Matters

Translating the vision of your strategic plan into simple, measurable, and consistent KPI's.



# Polling Question

*I have at least one dashboard I look at on a weekly basis*

- Yes - dashboards and automated reports are integral to my work
- Yes - but I still find myself doing too much manual reporting outside of my dashboards
- Yes - but my dashboard is created manually
- No – because the dashboard does not give me the information that I need
- No - having better dashboarding and reporting is a goal of ours



# Building the Business Case – Identifying a Key Issue

Who/What else is affected?

**Problem Evidence** – how do you know it's a problem.

**Results Evidence** – the measure of success, or what does success look like?

**Problem Impact** – what are the measurable impacts of the problem?

**Results Impact** – What are the implications or ROI of success?

What are the constraints?

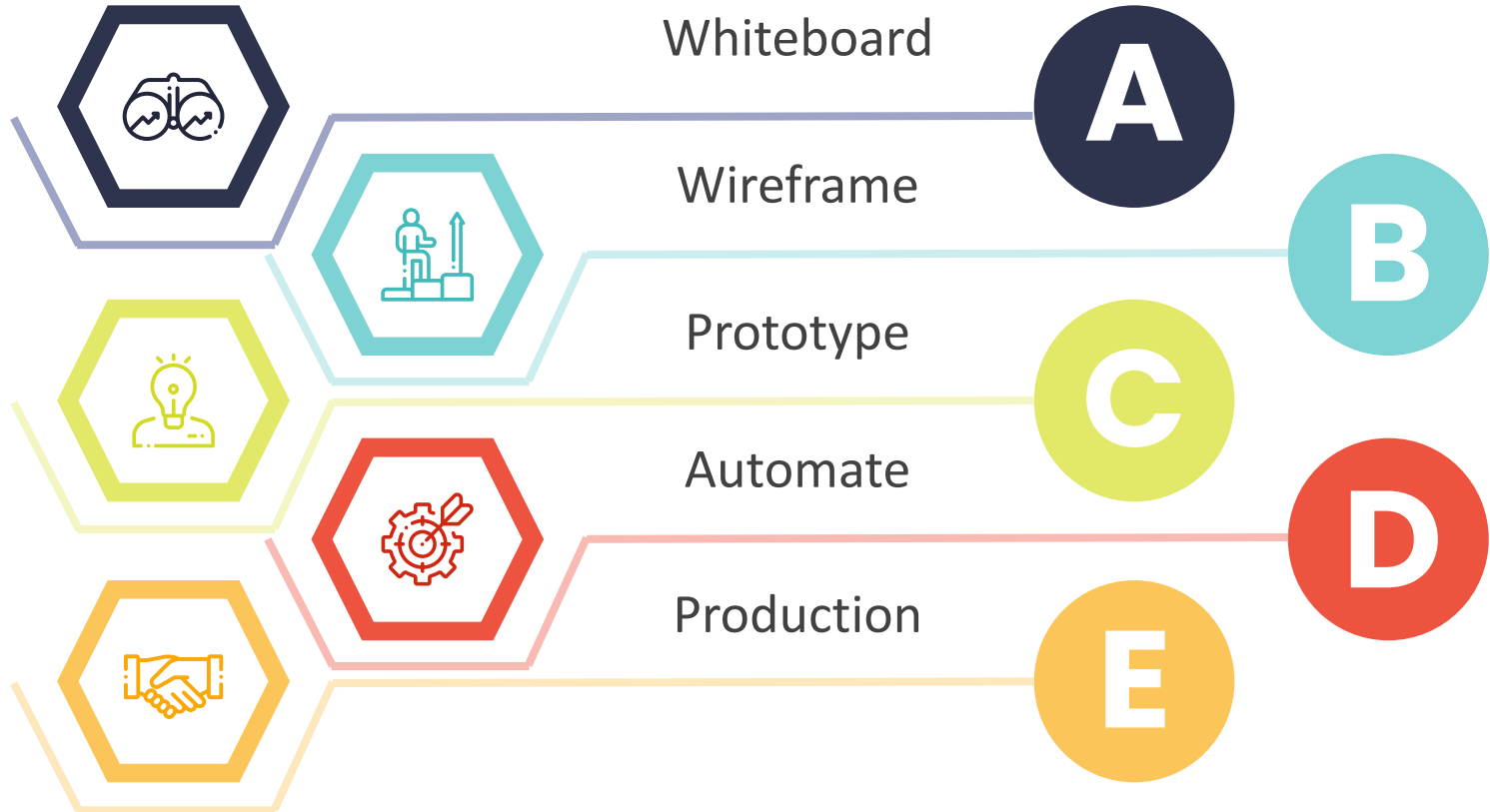
Source: Mahan Khalsa, *Let's Get Real or Let's Not Play*



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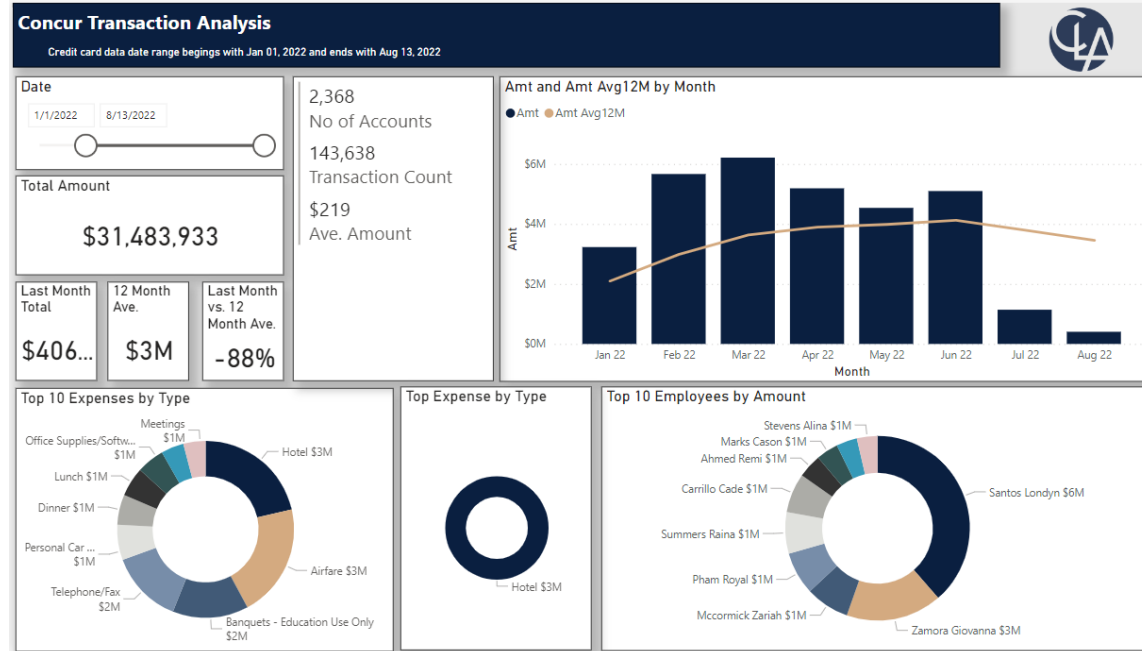


# From Idea to Dashboard



# Exercise: Whiteboarding Your Dashboard

1. Business Case
2. Determine Audience
  - a. Gather key stakeholders
3. Identify most important data & definition of success
  - a. Strategic Vision
4. Think about how to visualize story
5. Determine context and filters
6. Identify security needs



# Expense Reporting Analysis

## Concur Transaction Analysis

Credit card data date range begins with Jan 01, 2022 and ends with Aug 13, 2022



Date

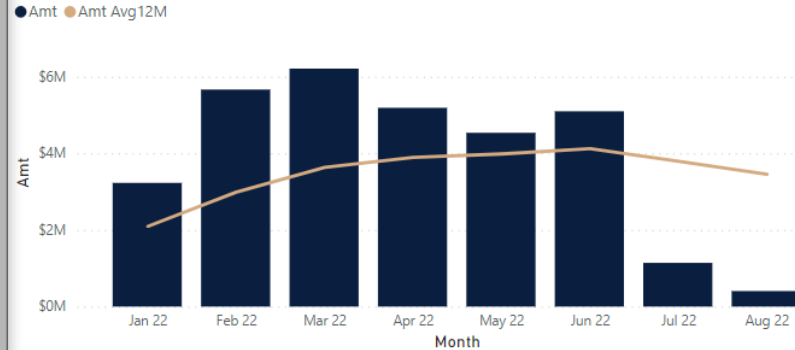
1/1/2022 8/13/2022

2,368  
No of Accounts

143,638  
Transaction Count

\$219  
Ave. Amount

Amt and Amt Avg12M by Month



Total Amount

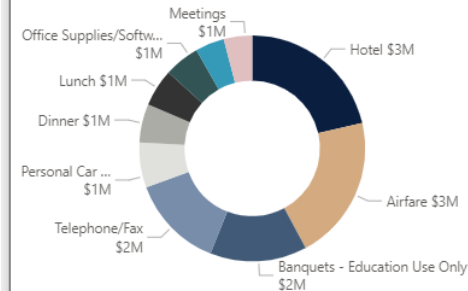
**\$31,483,933**

Last Month Total: **\$406...**

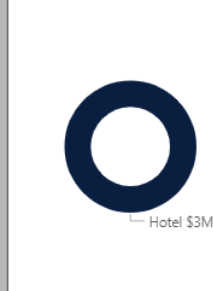
12 Month Ave.: **\$3M**

Last Month vs. 12 Month Ave.: **-88%**

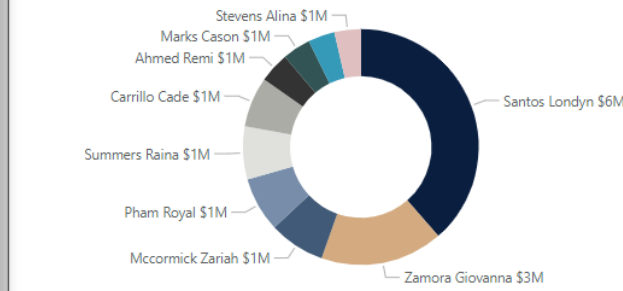
Top 10 Expenses by Type



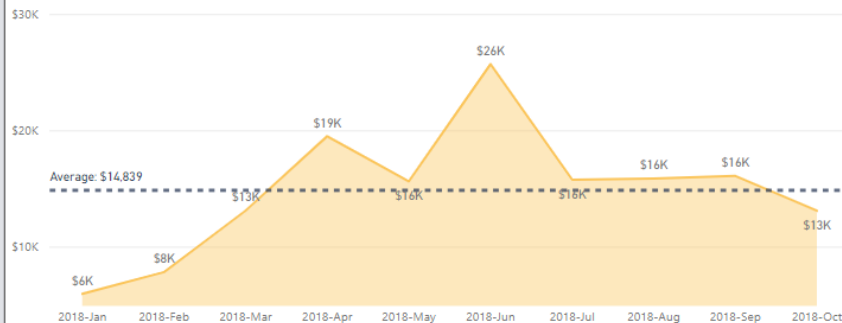
Top Expense by Type



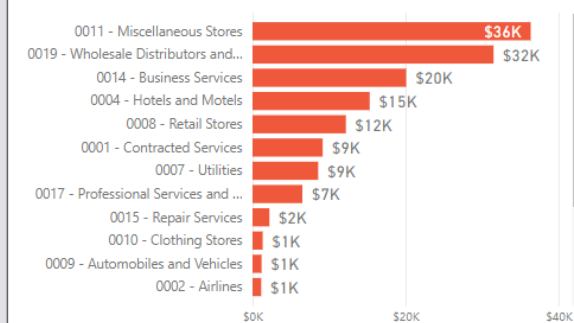
Top 10 Employees by Amount



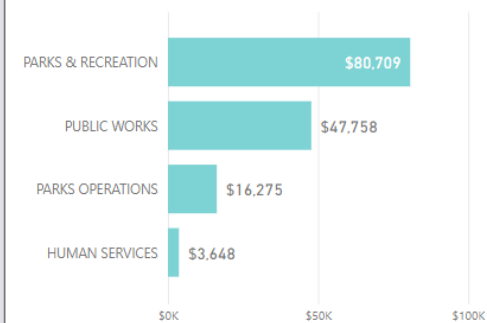
Total Amount and Nbr of Trans per Month



Total Amount by Category Code

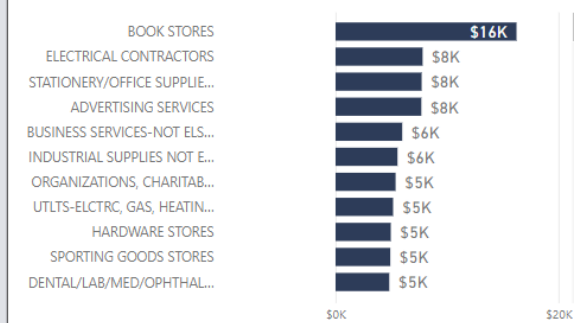


Total Amount by Department



Merchant Name	SumTransAmt
AMAZON MKTPLCE PMTS	\$9,412
SKS ELECTRIC	\$7,811
CINTAS 60A SAP	\$5,067
WESTERN DISPOSAL SERVI	\$4,211
INT*IN *PEAR PROJECT S	\$3,315
AMAZON.COM	\$3,238
WESTIN	\$3,055
GEMPLER'S	\$2,950
COURTYARD BY MARRIOTT	\$2,892
WESTERN PAPER DISTRIBU	\$2,720
DAYS INNS	\$2,714
VERITIV	\$2,617
MCSTRUCKIN HARDWARE	\$2,461
GOOGLE *ADW56447175969	\$2,438
THE HOME DEPOT #1546	\$2,436
TFS*FISHER SCI CHI	\$2,404
TFS*FISHER SCI CHI	\$2,404
<b>Total</b>	<b>\$148,390</b>

Total Amount by MCC Description





# How to Get There



Assess current state



Data strategy



Develop a roadmap



Short-term and long-term objectives



Internal working group



Test the technology



Educate yourself!

# Where to Go From Here and Questions?

- 3 Part Series
  - ✓ Crawl – Today
  - Walk – July 25, 2024
  - Run – September 12, 2024
- Have specific questions or want to discuss 1:1?
  - Click “Let’s talk. Contact me” and I will contact you.
- Mitch Thompson:
  - Phone: 317-569-6154 | Email: [Mitch.Thompson@claconnect.com](mailto:Mitch.Thompson@claconnect.com)
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  - Phone: 860-570-6352 | Email: [Gregory.Chambers@claconnect.com](mailto:Gregory.Chambers@claconnect.com)





Thank you!



*Thank you!*

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