

Wipfli Digital

Titan 100

Data is your Sleeping Asset

Confidential

WIPFLI

WIPFLI

AT A GLANCE

Wipfli Fast Facts



Top 20

accounting and advisory firm

3,000+

Number of Associates

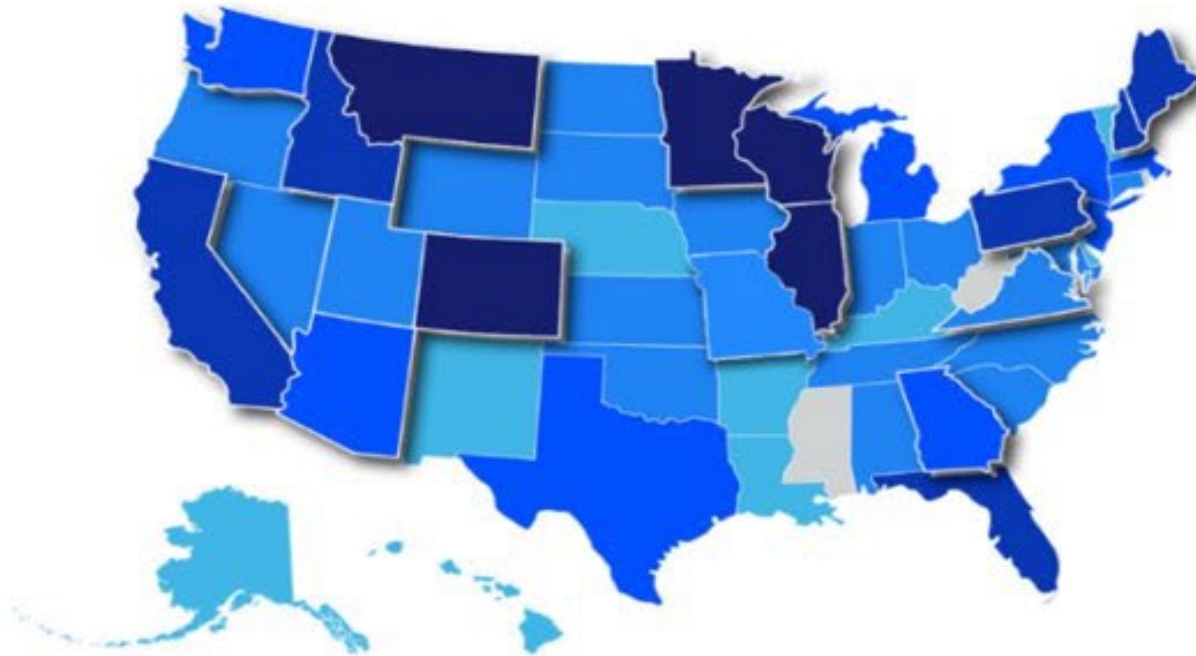


318

Number of Partners

40+

Number of locations in the U.S. and India



Manufacturing, Retail and Distribution



Financial Services



Private Client Group



General Office



Construction and Real Estate



Nonprofit and Government



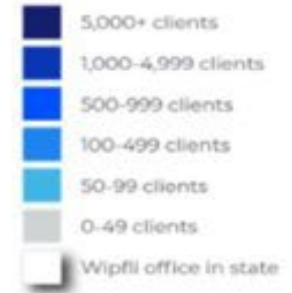
Healthcare



Tribal Gaming & Government



Technology



Wipfli Services: Helping your business go further



Tax, Audit & Accounting

- Internal audit
- Long-term/onsite outsourced accounting
- Interim accounting resources
- Tax



Cybersecurity

- SOC for cybersecurity
- Risk assessment
- Policy development
- Managed detection and response
- IT audit
- Business continuity



Technology management

- Cloud deployment
- Software selection
- Collaboration tools
- Outsourced technology
- CIO Services
- ERP Implementation



Organizational Development

- Fund Development
- Talent Acquisition
- Change Management
- Strategy



Digital Transformation

- Data Management
- Business intelligence / Analytics
- Predictive Analytics, ML, NLP
- Financial Budgeting & Planning Solutions
- Customer-engagement app dev
- Mobile Development
- Web Design



Training

- New Regulations and Best Practices
- Webinar based Lunch and Learns
- National Training Conference

Understanding Analytics

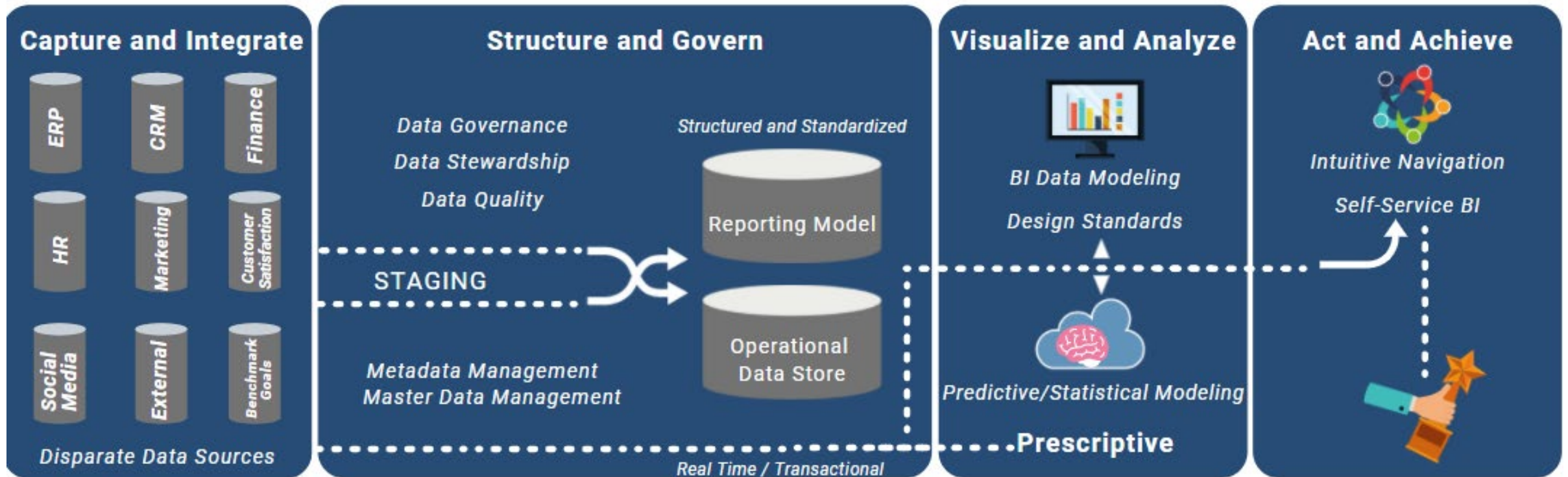
It's all about the data

- Data is an asset that can provide great value
- Companies capture many sources of data
 - CRM, GL, Marketing, HR, POS, External public
- Like any other asset, it needs to be managed effectively to maximize its value

Goal

- Business users can access data at the point/time of decision
 - Self-service
 - Have a conversations with your data
- Do not rely on IT for information when it is needed
- **Accurate, available and consistent data for business users is the goal**

Enterprise Data Management & Analytic Journey



Are you a Data Hoarder?



Organizing does not always mean Optimizing...



Are you in the DATA business?

Hint: Everyone is, the difference being how data is leveraged.

Organizations with enterprise data programs produce better results!

23x

More likely to acquire new customers

18x

More likely to remain profitable

18%
points

Higher gross margins

\$40k

More revenue per employee

50%+

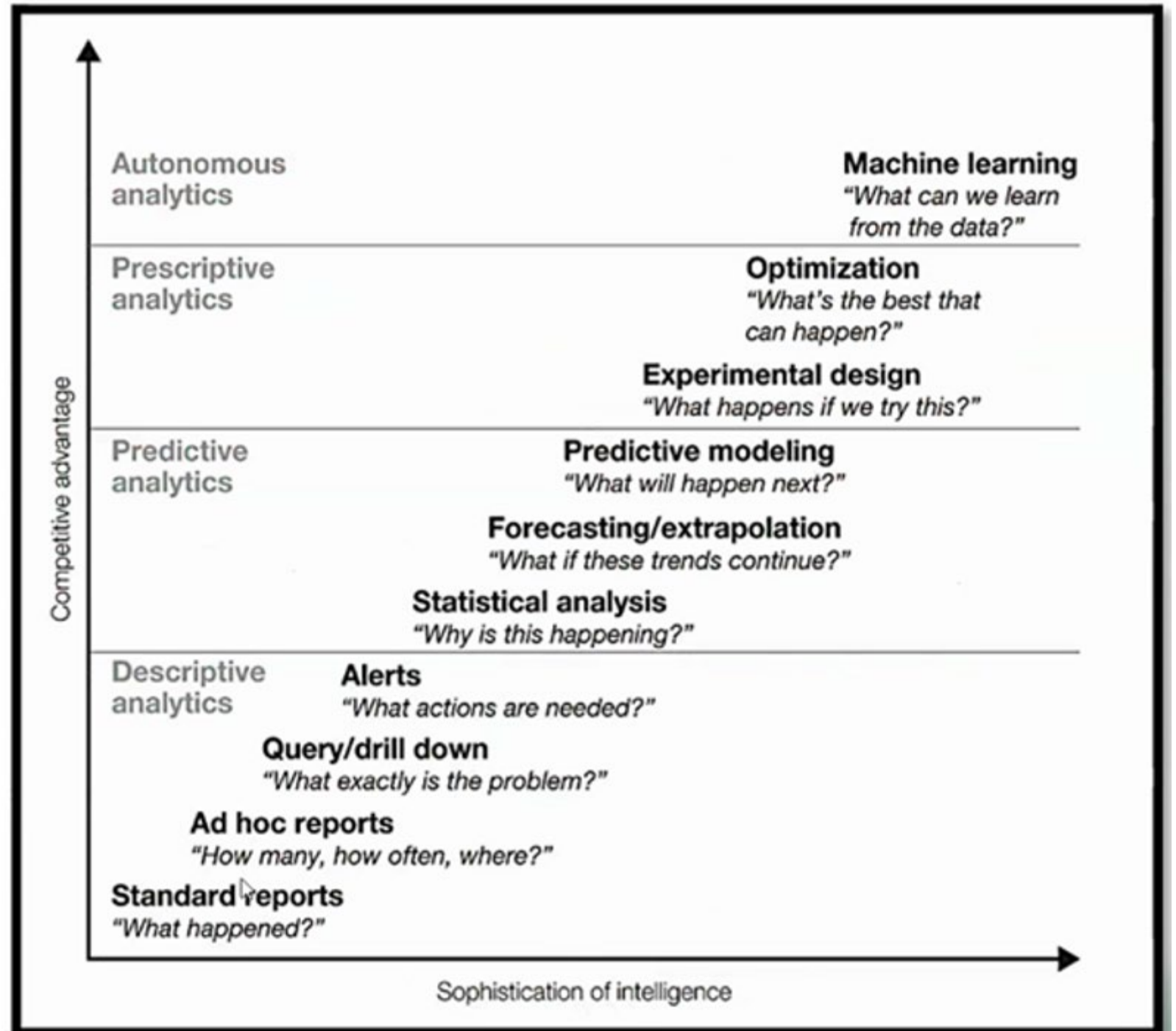
Higher average net income on revenue

Data Driven

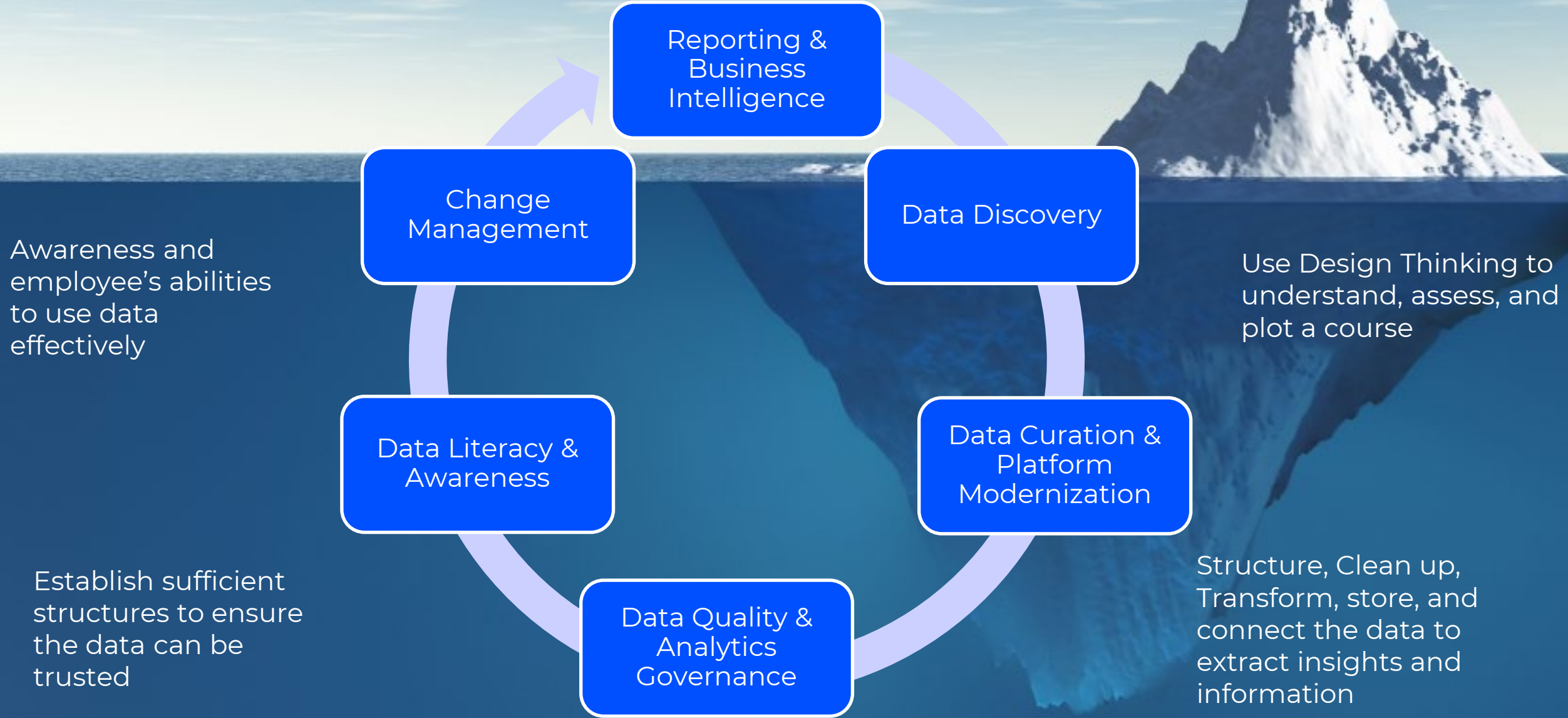
Where are you ?

Where do you need to aim?

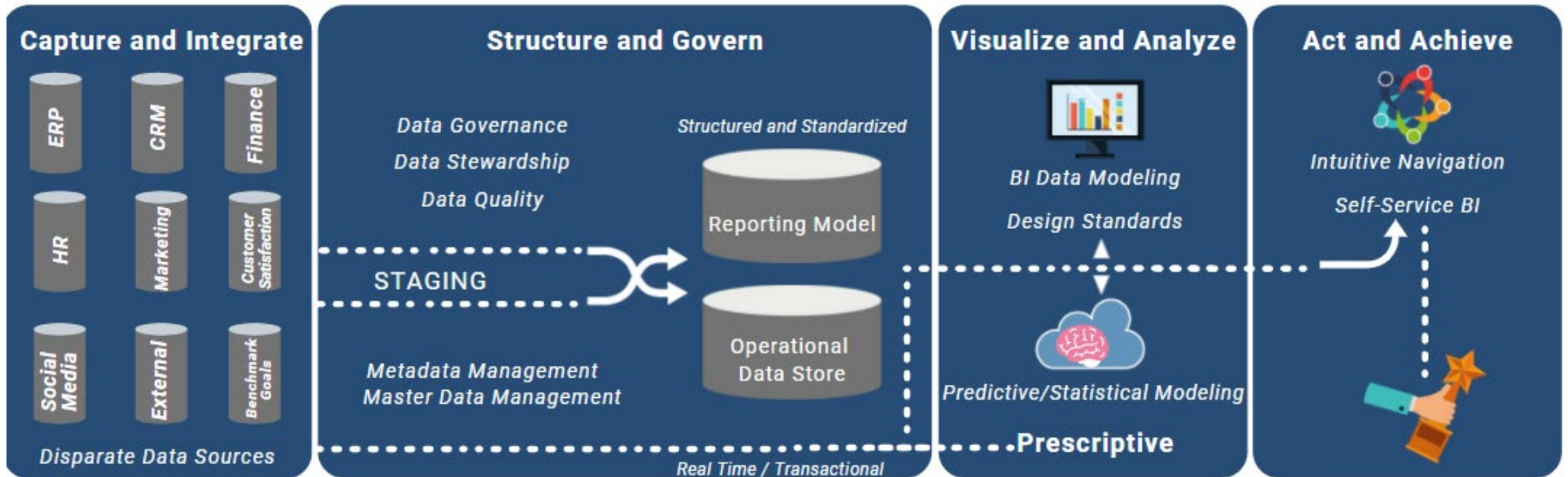
Who is driving change?



DATA ASSETS & TRANSFORMATION COMPONENTS



Data Management & Analytics Journey



Best Practices in Enterprise Data Management (EDM)

EDM Bus. Processes

- Data Governance
- Data Stewardship
- Backlog Management
- Center of Excellence
 - Visual design standards
 - Training / Education
 - User communities

EDM Tech Components

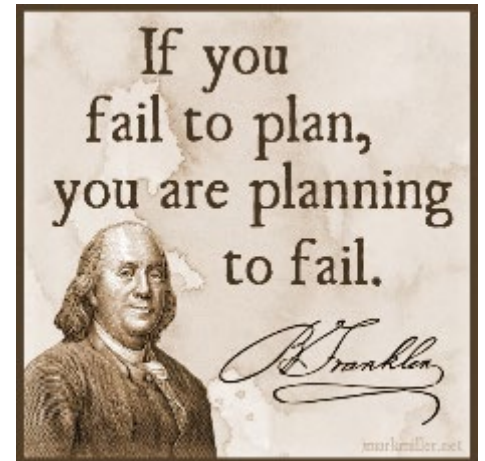
- Data Staging (Lakes, etc)
- Data Warehouse
- Analytic Data Stores
- Data Visualization

EDM Tech Processes

- Connection Management
- Logical Data Modeling
- ETL (Extract, Transform, Load) Development and Management
- Metadata Management
- Master Data Management
- Data Quality Monitoring
- Information Security Management

Where to start toward Enterprise Data Analytics?

- Roadmap – Consensus on Vision and Plan
 - Defines Current State and Future State
 - Subject Area Analysis enterprise wide
 - Identify technical debt
 - Solution Architecture (Processes, People & Technology)
 - Phases of Implementation
 - Value, Time and Cost
- Define and Design (Department focused) – Deliver on Vision
 - Detailed Discovery and Design for a Specific Analytics Project or Implementation Phase
 - Identify high value subject areas
 - Best sponsors are change agents within an organization



Lessons Learned

- Cloud strategy NOW
- Siloed approach will create technical debt and create inefficiencies
- Big Bang approach to Data Management does not work
- Identify change agents as sponsors
- Communicate value along the journey
- Create analytic communities within your organization
- Plan (the single greatest reason for failed analytic initiatives is lack of planning)

Contact

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