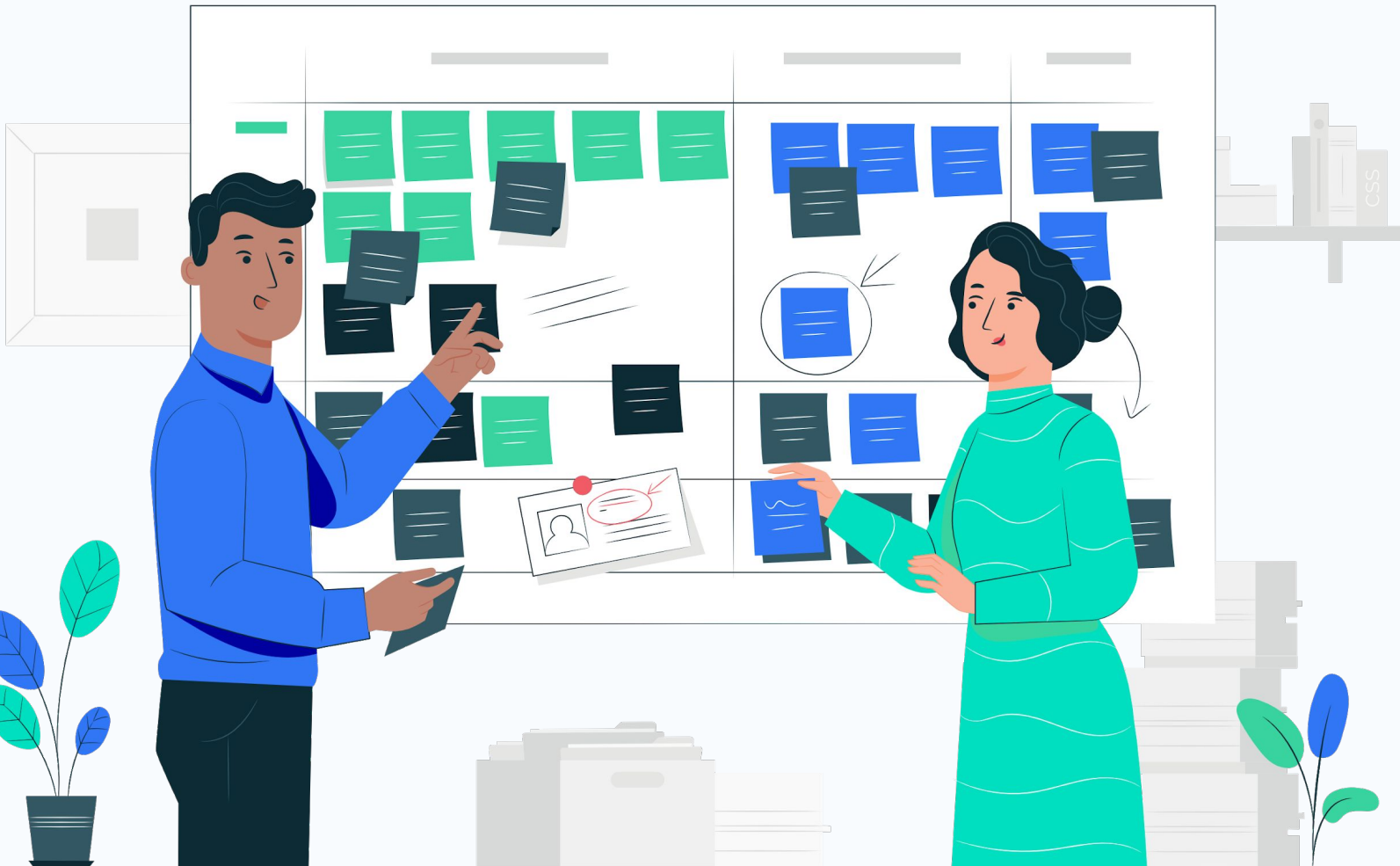


Checklist guide

Seven steps to evaluate your data



Preview

- 01 Step 1**
Identify the business challenge
- 02 Step 2**
Select the challenge you will address
- 03 Step 3**
Identify the people side of the business challenge
- 04 Step 4**
Write a challenge/problem statement
- 05 Step 5**
Identify the relevant data you have access to
- 06 Step 6**
Put the data in context
- 07 Step 7**
Data wish list

STEP 1

Identify the business challenge

Make a list of the top five to ten business challenges your company is facing.

TIPS

If you're not sure, consider how you might be able to learn more about the business:

- Have you reviewed your company's strategic plan or those of different business units recently?
- Does your organization have an internal social media account?
- Can you arrange coffee chats or interviews with key business and organizational leaders?
- What can you learn from data you already collect, such as engagement survey results, turnover, or information from HRBPs and employee relations?

Top 5 Challenge:

STEP 2

Select the challenge to address

Challenges that are most closely aligned with your company's competitive advantage (how you make money or fulfill your mission) are prime targets because any solution will be highly valued.

Another factor to consider is whether the following conditions for successful change are being met:

- Committed leadership
- Need for change
- Powerful vision
- Critical mass
- Resources for effective implementation
- Potential to modify people practices to support the change

Selected Challenge(s):

In evaluating challenges, identify whether the challenge has come up in the past. If so, what has been tried before? What worked or didn't work about that solution? If the challenge has come up before and a solution was not identified, why not?

Identify the people aspect

What people and processes support the business challenge? Consider the following aspects:

- Culture, norms, compensation, rewards, recognition
- Leadership and management
- Individual knowledge, skills, abilities, and other characteristics
- Attitudes and motivation

STEP 4

Write a challenge statement

Write a short description of the problem. The statement should be succinct but address the five Ws:

- Who does the problem affect?
- What is the issue?
- When does the issue occur or when does it need to be fixed?
- Where is the issue occurring?
- Why is it important that we fix the problem (i.e., what's the business impact)?

Identify existing relevant data

Think broadly about the data sources you have access to. What do you have in your HRIS system, learning and development platform, or ATS? What data are the business units routinely collecting (e.g., customer relationship management [CRM] data)? What subscriptions do you have or could you gain access to that might provide a source for external benchmarking (e.g., from professional or trade associations)?

As you review the data you have at your disposal, think about the pros and cons of each data source. No data are perfect, but make sure you consider the following factors:

- **Trustworthiness**
 - Are the data complete?
 - Are they accurate?
 - Are quality control or validation procedures in place?
- **Reliability and standardization**
 - Is there an agreed upon definition?
 - Do the data exist in multiple systems? Are they comparable?
- **Usability**
 - Can you get access to the data?
 - What timeframe do the data cover? How recently or frequently are they collected?
- **Are processes in place to ensure consistency?**

Put the data in context

There are two broad ways to help contextualize your data:

Internal benchmarking.

- Consider where you might be able to gather information to put the data and metrics in a broader context within your organization. Can you compare one department to another? Do you have data over time that allow you to compare information from the same quarter, for example, across years?

External benchmarking.

- Looking outside the organization can help you gain awareness of macro trends that might be impacting your organization and provide some insight into what “high,” “low,” and “average” look like in a broader sense. All organizations are different, so be cautious not to rely too heavily on external benchmarks. You can gain access to external benchmarking data through professional or trade associations, or specialized vendors.

STEP 7

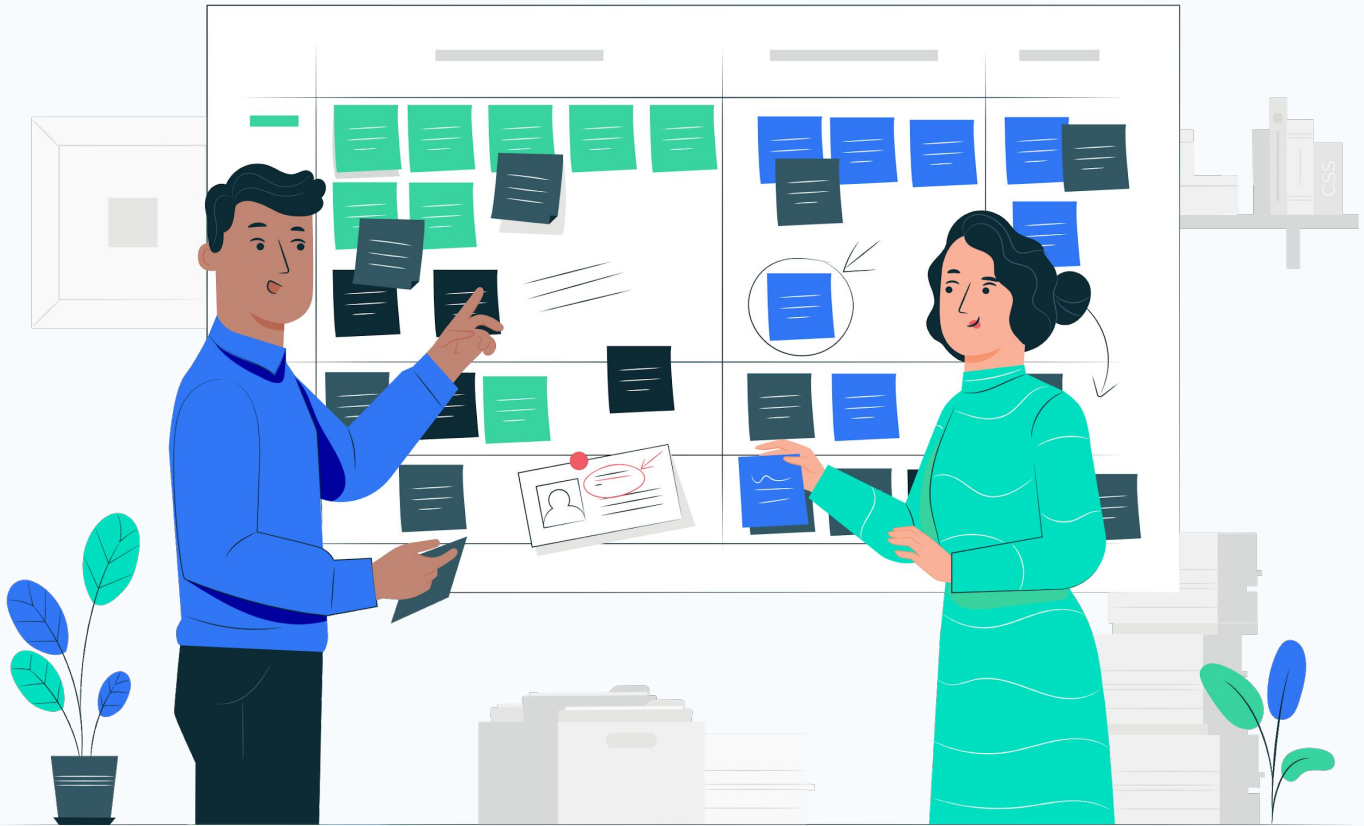
Write your data wish list

Review your responses to Steps 5-6.

Where are there holes in content or quality? How might you collect new data to fill in those holes? The following are a few examples of how you might collect new data: interviews or focus groups, surveys, and new administrative data collection (e.g., adding a new variable to the employment application).

As you consider collecting new data, evaluate the feasibility. How resource intensive would it be to collect the data? You might be willing to collect data even if it will be difficult, so long as the data will be valuable in addressing the challenge.

Gap	Source	Feasibility



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