Reporting Automation and Analytics Academy

dbrown CONSULTING

CFA Society Nigeria | CPD MEMBER — The CPD Certification Service | FINANCIAL MODELING INSTITUTE | AFM

Report Automation & Analytics Academy ™ is the only implementation program of its kind that shows you how to eliminate manual and routine departmental reporting with our unique 5-step framework methodology called MODES. For 17 plus years dbrownconsulting has focused on helping our clients achieve all their reporting and automation goal with MODES to build robust analytics systems that work using the tools they already have.

Overview

The Reporting Automation and Analytics Academy (RA3) is a 5-Step Framework to Build the Reporting & Analytic System that works for you without IT support or any new Software.

It is the only implementation program of its kind that shows you how to eliminate manual and routine departmental reporting. It also allows you and your organization to leverage your tools' inbuilt artificial intelligence capabilities with modern visualization design for more profitable data-driven decision making.

Learning Outcome

By the end of the Academy, participants will be able to:

- Map out all your current reporting state, knowing where you are now, your charts, tables, data sources, support, and more; will give clarity to helping you focus on what matters.
- Organize your content using a unique framework that quickly reveals duplicated efforts by you and your colleagues and a clear road map for success.
- Design a data model with the future in mind, a system that will scale with you; IT will be proud!
- Expertly implemented your new system using only the tools you already have, so you are quicker to implement the new Analytic system you have built, getting excellent results even quicker.
- Seamlessly connect your new system to all your data sources for automated refreshing of your reports and analytics, allowing you to spend more time brainstorming on the stories behind the numbers leading to productive meetings.
- Learn the art of pattern recognition to generate more meaningful analytic stories by leveraging the power of Artificial Intelligence sitting dormant in your current tools, allowing you to consistently explore why things happen rather than just reporting what happened.

- You will also have learnt a new language for telling better data stories through a step-by-step process following an intuitive framework that facilitates an even higher level of thinking for all involved.

Academy Modules

Module 01: Map out your Current State
Course Content:
- Understanding your two Data Systems
- Selecting your Report Automation Project
- Managing Data Sources and Data Owners
- Collating all your current Reports
- Identifying your Reporting Fields
- A Glossary of Metrics and Measures
- Auditing & Scoring your current state
- Completing your Mapping Phase

Module 02: Organise your Data
Course Content:
- Introducing the ARC Framework
- Identifying your core metrics
- Defining your report Relationships
- Your Glossary of Computations
- Comparisons and the Why of your reports
- Getting organized with a naming convention
- Documentation with the ARC Tool
- Completing your Organize Phase

Module 03: Design the Data Model
Course Content:
- The limitations of your Flat File Design
- The only numbers that matter
- The power of your 4W's
- Unifying your Labels across the board
- Enhancing the Analytic Power of your Design
- Key Metrics and your Data Model Design
- Designing for Benchmarks and Comparisons
- Completing the Design Phase

Testimonial

Probably the biggest thing that impressed me is the Model itself as well as the approach; having done stats and working in management development, I felt for years that there is a lot of things you can bring together, especially in correlation and so to hear [David's] experience, I think that it's really what stood out for me. I am actually excited, I shared it with everybody who is on our business analytics team because I was like, you guys need to take a look at this, think about this, there are ways I would say I think I could do this, but to see my thoughts of what I thought was possible, represented, was what I really enjoyed about the talk the most."

– Tonya T. Tucker Collins
VP of Talent EBx, IDEB, Management & Development | Twitch, USA

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Module 04: Execute your Design

Course Content:

- Reviewing your Data Model Design
- Identifying your best Tools for the Job
- Tips on managing Spreadsheets
- How to connect your Fact Table
- How to connect to your 4Ws
- Executing your Data Model Design
- A word on Data Types
- Automating your Standard Reports
- Completing the Execution Phase

Module 05: Storytelling with SUCCESS

Course Content:

- Getting to the Story in your Data
- Storytelling and the SUCCESS Framework
- Crafting a Language for your reports
- How to Identify the right visuals
- Harnessing the Power of Comparisons
- Constructing your Story
- How to Present your Story
- Completing the Story Phase
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Module 06: Leveraging Artificial Intelligence for Analytics

Course Content:

- Extracting some basic statistics from your data
- Recognising Patterns in your data
- Separating the Signal from the Noise in your reports
- Using AI to get to the Signals
- Optimizing your data model for Analytics
- Advanced-Data Storytelling with natural language narratives
- Tips for improving productivity with AI features
- Completing the AI & Analytics Phase

Module 07: Sharing your Reporting and Analytics

Course Content:

- Defining your varied audiences' needs
- Identifying the sharing method that works for you
- User Interface and Device Considerations
- Security considerations
- Deployment considerations
- Best practice considerations
- Completing the Sharing & Collaboration Phase

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