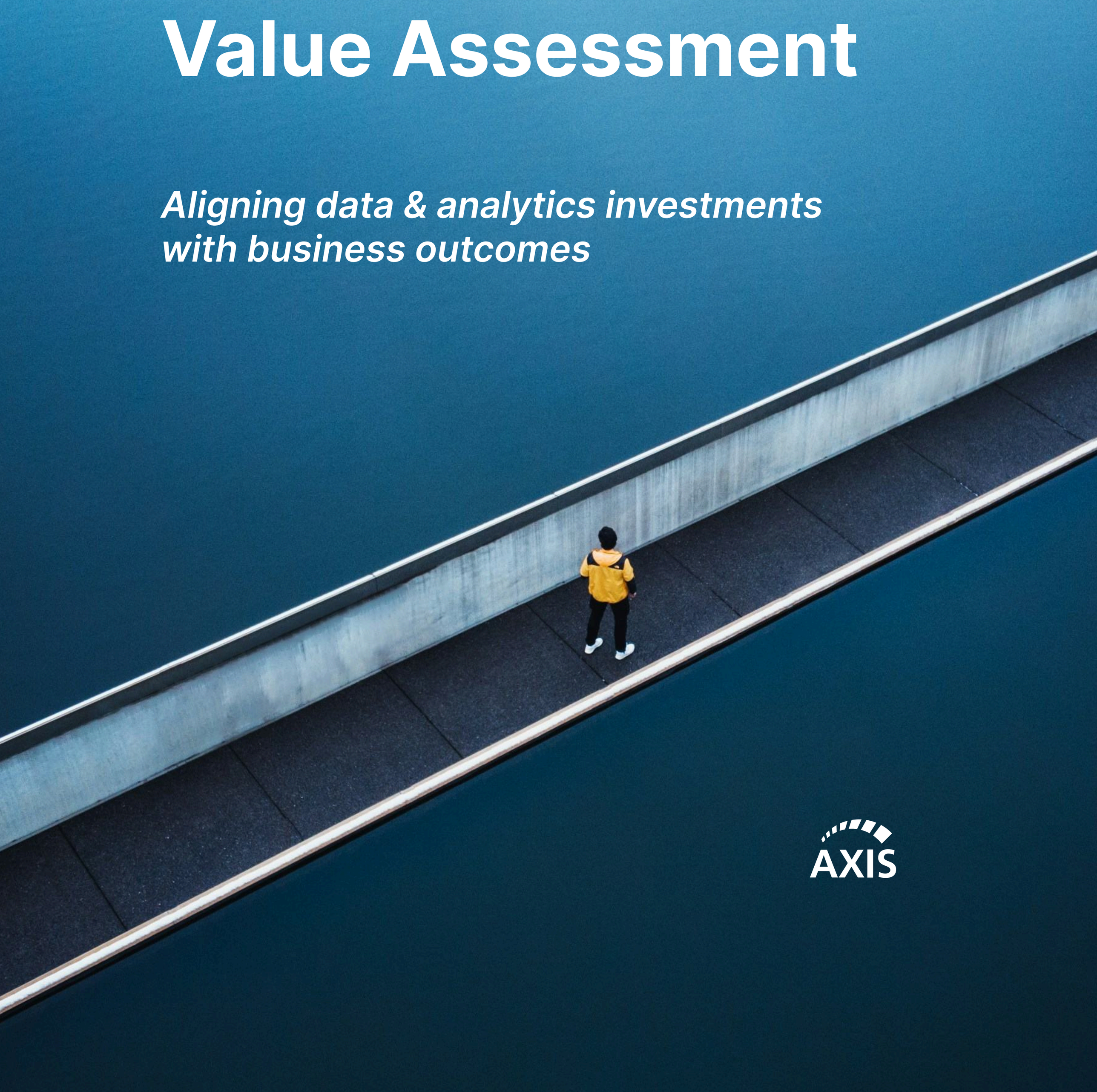
Data & Analytics Value Assessment

Aligning data & analytics investments with business outcomes



Methodology Overview

We can all agree that there is immense value in data. But how exactly do we get value out of data? By buying the latest and greatest technologies? Hiring more data engineers? Or building AI models? With so many investment options on the table, which ones are right for you? How does each option help you generate value?

We have seen organizations struggle to articulate **a strategic plan that brings clarity for both business and IT**, and we developed a solution.

The Axis Data & Analytics (D&A) Value Assessment is a proprietary methodology we use to help our clients build a strategic roadmap to strengthen their data & analytics capabilities in alignment with business value creation.

Data & Analytics Value Assessment

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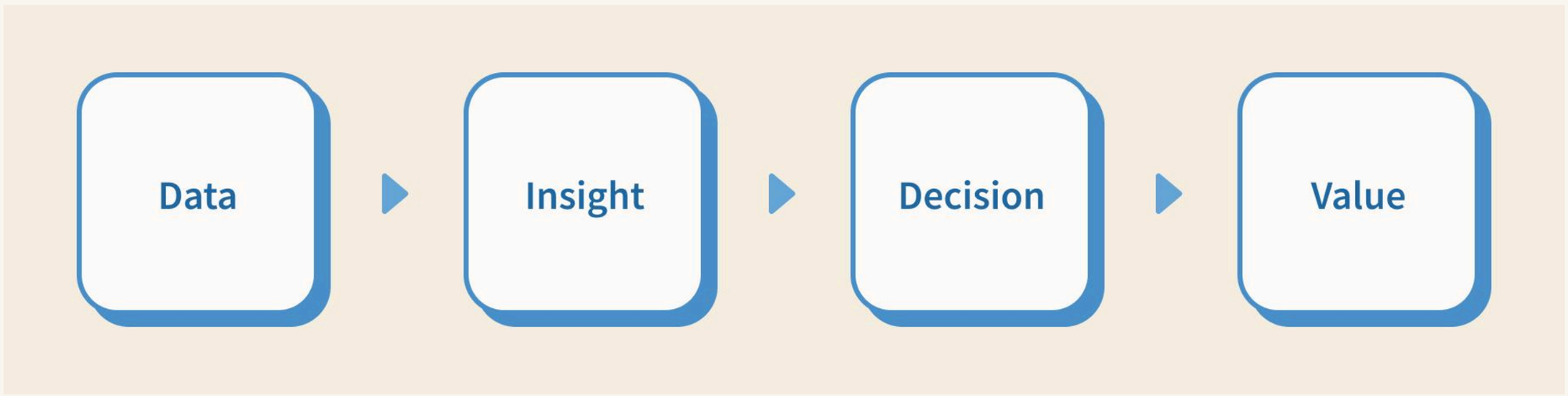
What’s Next?

D&A Value Chain

The data and analytics value chain follows a clear progression: data generates quantifiable insights, insights inform business decisions, and better decisions drive measurable business outcomes. This fundamental logic underpins every successful analytics initiative, yet translating this simple concept into organizational reality presents significant challenges. Each link in the value chain introduces critical questions that must be addressed:

- **Data Foundation**: Which data assets are essential for your business objectives? Is your current data accessible, accurate, and structured for analytical use?
- **Actionable Insights**: Beyond basic KPIs, do you have diagnostic analytics to identify root causes and prescriptive analytics to evaluate strategic options? Are insights delivered in formats that drive action?
- **Decision Making**: Which high-impact decisions across your organization remain intuition-based rather than data-driven? How do different stakeholders prioritize these decision points?
- **Value Realization**: How will improved decisions translate into tangible business value—revenue growth, cost reduction, risk mitigation? What measurement frameworks will validate ROI?

Without systematic assessment of each component and explicit alignment among leadership, organizations struggle to move beyond isolated analytics projects to enterprise-wide transformation. The D&A value assessment framework addresses this gap by providing structured methods to evaluate, prioritize, and optimize each element of the value chain.

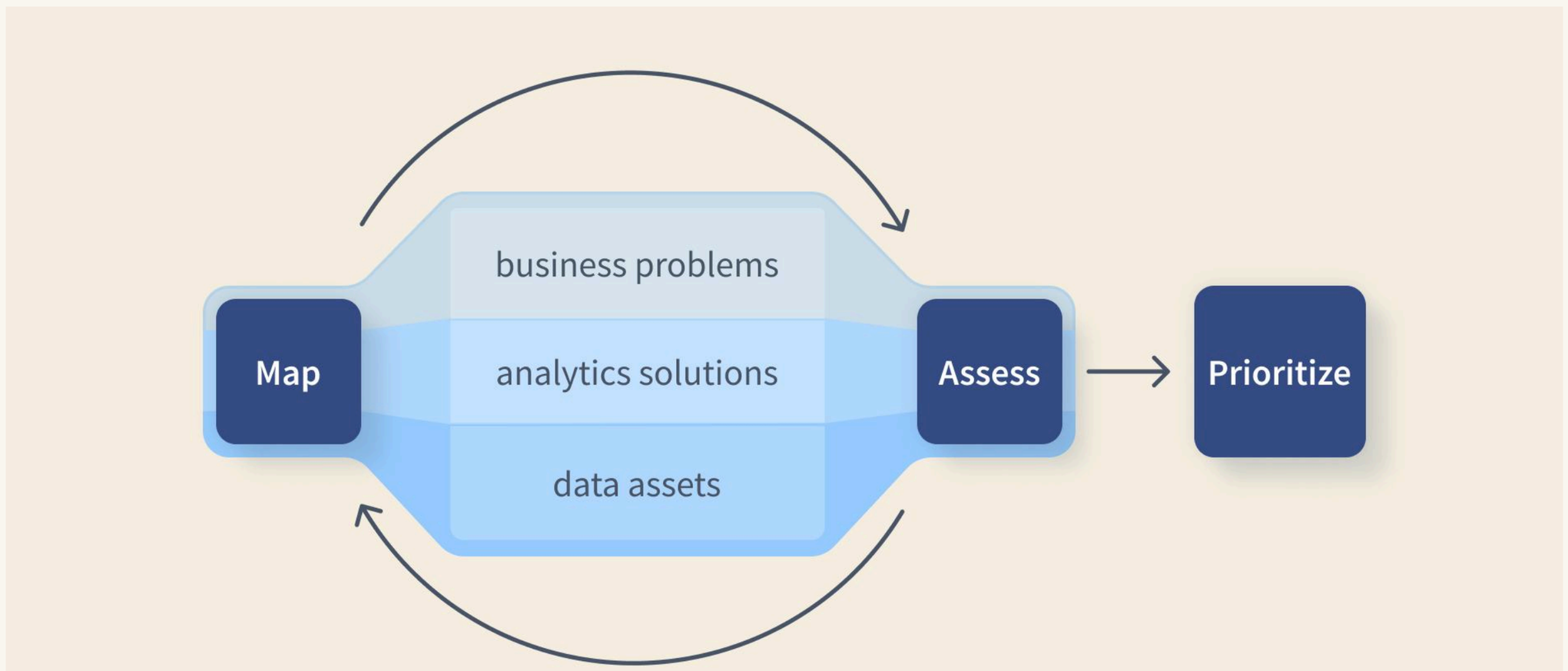


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Assessment Model

The D&A value assessment model evaluates analytics maturity and opportunities across three interconnected layers. At the business layer, the model maps critical problems and decisions that require data-driven insights, capturing the decision-making logics and the business outcomes they drive. The insights and analytics layer assesses current and needed analytical capabilities, identifying gaps between existing solutions and what's required to address business problems effectively. The data foundation layer inventories data assets and traces them to source systems, evaluating quality, accessibility, and readiness to support analytical use cases.

By systematically analyzing these three layers and their interdependencies, organizations gain a comprehensive view of their analytics landscape and can prioritize initiatives based on business value and implementation complexity. This integrated approach ensures that D&A investments are grounded in real business needs while accounting for the technical realities of data availability and system capabilities, ultimately creating roadmaps that balance quick wins with long-term transformation objectives.



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Assessment Steps

The assessment process begins with a discovery workshop that brings together business and D&A leaders to establish a shared understanding of current capabilities, pain points, and strategic objectives. This collaborative session sets the foundation for deeper analysis, with targeted follow-up interviews to gather detailed requirements from key stakeholders across the organization.

The assessment then follows a logical progression through the value chain. Starting with the organization's north star metrics—such as operating profit or customer lifetime value—we map the cascade of business problems and decisions that influence these outcomes. From this business problem map, we identify the specific insights needed to improve decision-making, assess current analytics capabilities, and pinpoint critical gaps or enhancement opportunities.

This drives the development of a conceptual business data model that connects needed analytics to underlying data assets and source systems. We document data quality issues, integration challenges, and the effort required to build a reliable data foundation. The assessment culminates in a collaborative prioritization exercise where stakeholders evaluate D&A initiatives based on business impact and implementation complexity, resulting in a strategic roadmap that sequences investments for maximum value realization.

Mapping Business Problems

Effective D&A transformation begins with a comprehensive understanding of the business problems that analytics must address. This mapping process connects high-level objectives—such as operating profit goals—to the specific variables and decisions that influence these outcomes.

Each business problem requires clear definition including measurable outcomes, performance benchmarks, and the business rules that signal when intervention is needed. The mapping process identifies both direct factors that influence outcomes and interdependencies between problems, revealing how improving one area can cascade benefits throughout the organization.

While the specific format varies by organization, visualizing these problem relationships helps stakeholders discuss gaps and potential value. This shared understanding becomes the foundation for identifying which insights matter most and where D&A investments will generate the highest returns.



An example of business problem map

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Analytics Tiers

The business problem map enables systematic identification of analyses and insights needed to drive better decisions and outcomes. These analytical requirements naturally organize into three tiers based on their criticality to operations and solution complexity:

Tier 1: Core Analyses, provide foundational insights essential for organizational alignment. These analyses create a common fact base that reduces miscommunication and enables consistent decision-making across teams.

Tier 2: Enhanced Analyses, elevate organizations from reactive to proactive management through deeper insights. By surfacing hidden patterns and correlations, enhanced analytics drives measurable efficiency gains and cost reductions across core business processes.

Tier 3: Advanced Analyses, unlock transformative insights by harnessing AI and machine learning to build new competitive advantages that lead the future of your industry.

Data & Analytics for Multifamily

	CORE	ENHANCED	ADVANCED
Finance	8	6	
Occupancy	5	3	
Pricing	4	2	1
Leasing	4	8	2
Marketing	2	4	
Renewal	2	2	2
Customer Experience	2	3	1
Services	3	8	
Risk Management	5	2	

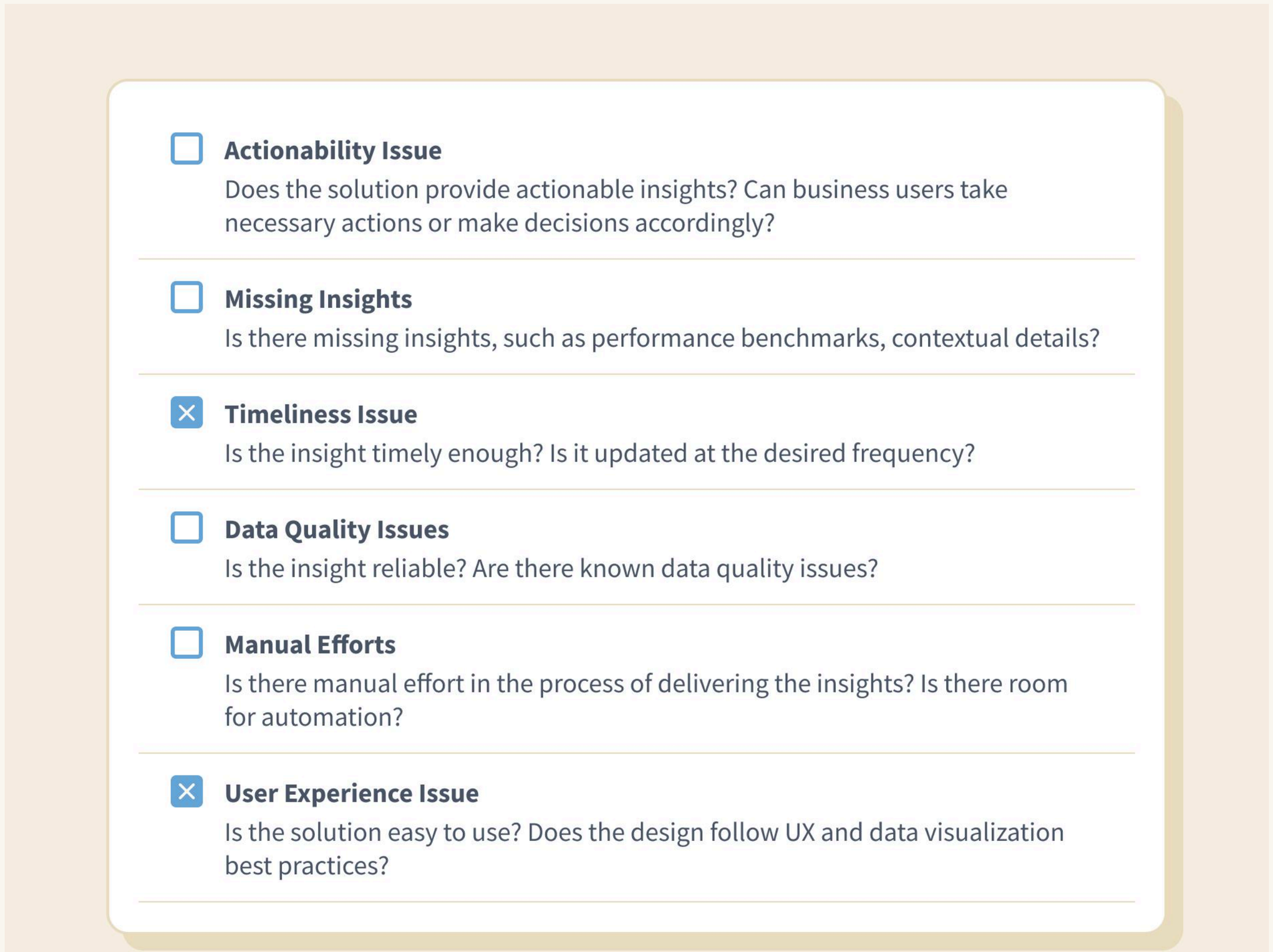
Check out our Data & Analytics for Multifamily framework for a more details.

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Assessing Existing Analytics Solutions

Before investing in new analytics capabilities, organizations should thoroughly evaluate their current solutions against the analyses identified in the business problem mapping. This assessment reveals which existing tools can be optimized versus where net-new investments are required.

The evaluation should examine multiple dimensions of solution effectiveness: whether insights lead to concrete actions, if analyses provide complete information for decision-making, how timely the data delivery is relative to decision windows, underlying data quality issues that compromise trust, manual processes that create bottlenecks, and user experience barriers that limit adoption.



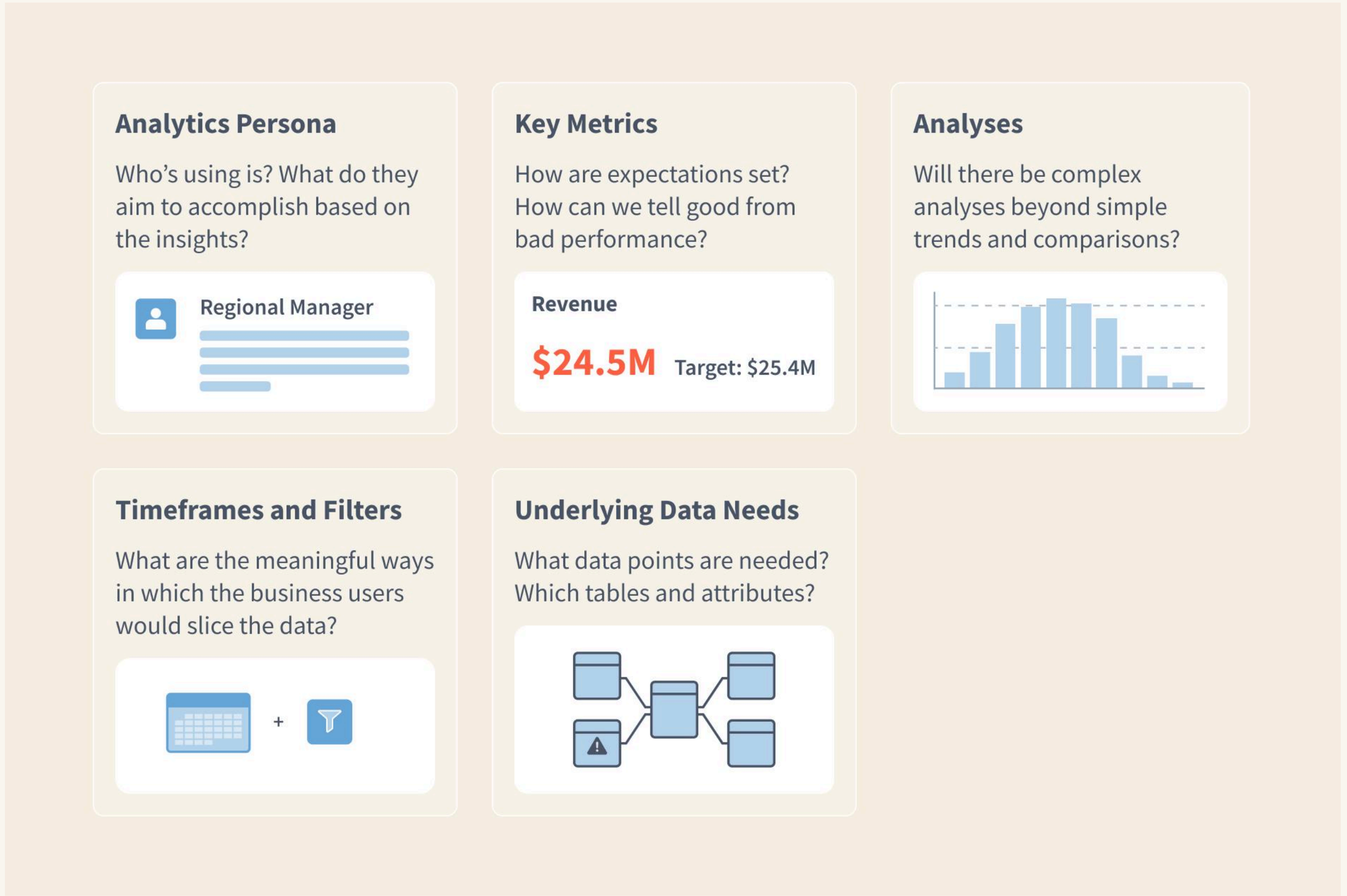
An example of assessment checklist for existing analytics solutions

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Defining New Analytics Solutions

Clear definition of new analytics solutions is essential for accurate effort estimation and informed prioritization of D&A initiatives. A structured approach ensures all critical elements are captured before development begins.

The definition process should address a few core components. First, identify the analytics personas who will use the solution and their specific needs. Second, identify the key metrics that directly measure business outcomes and leading indicators. Third, understand the analyses required, specifically whether complex or advanced analyses, such as distribution and correlation, are needed. Fourth, define the temporal requirements and filtering capabilities users need to slice data meaningfully. Finally, the analytics requirements should inform the underlying need for data, which helps us create the business data model for data asset assessment.



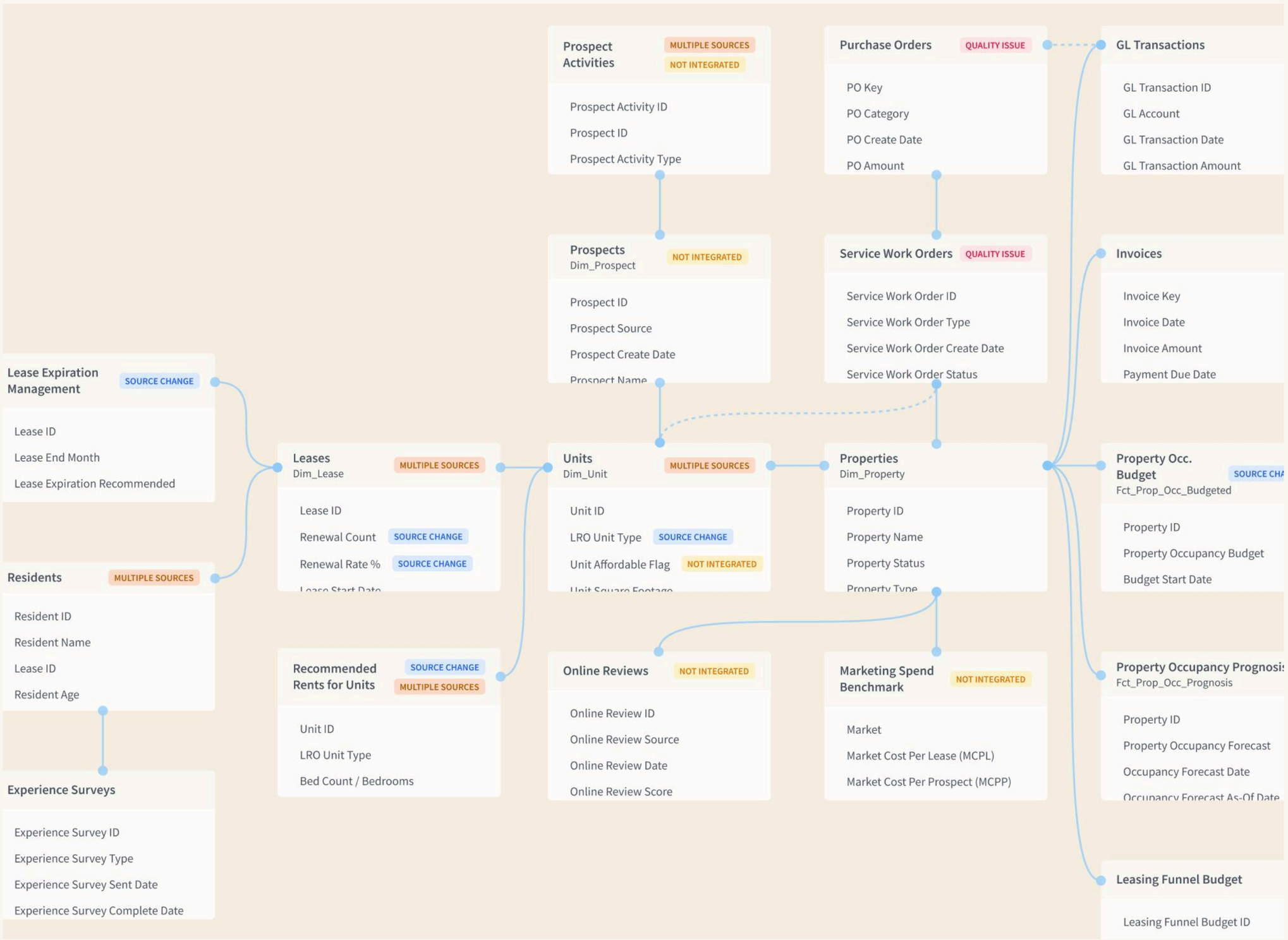
Key elements to defining the needs for a new analytics solutions

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Business Data Model

The analyses and insights identified through business problem mapping drive the creation of a conceptual business data model that connects analytical requirements to underlying data assets and source systems. This model serves as a critical bridge between business needs and technical implementation, ensuring all stakeholders share a common understanding of data dependencies and requirements.

For each data asset in the model, the assessment captures current challenges, such as integration complexity when multiple systems claim to be the source of truth, data quality issues that undermine trust in insights, and ongoing source system changes that create maintenance burdens. By documenting these issues alongside the business context, the data model becomes a powerful collaboration tool that helps business and IT leaders jointly identify gaps, prioritize remediation efforts, and make informed decisions about data foundation investments in the strategic roadmap.



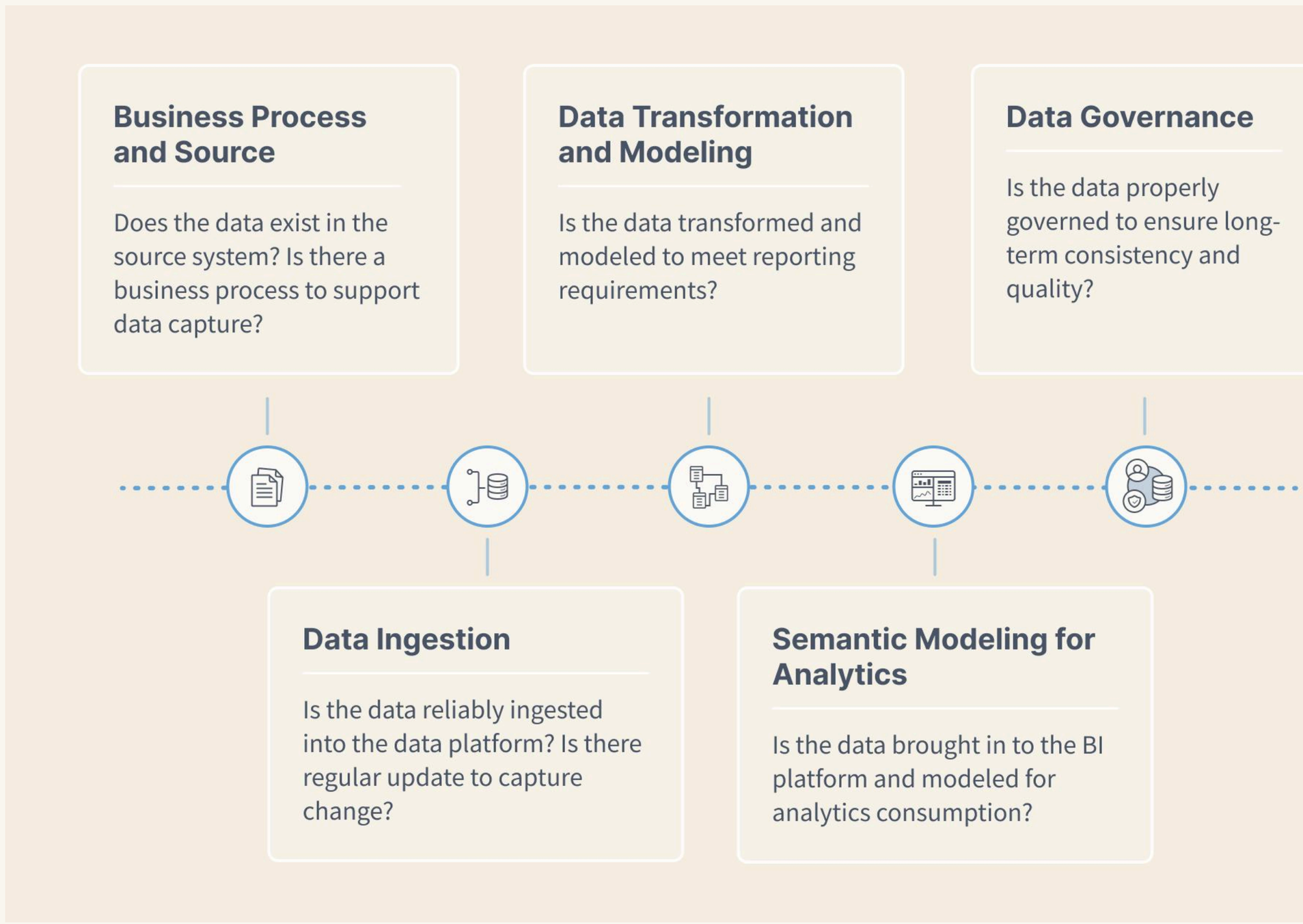
An example of business data model with issues captured

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The Journey of Data

The phrase "we don't have the data" means different things to different stakeholders because data traverses multiple stages from initial capture to final consumption. Understanding where each data asset sits along this journey is essential for accurately estimating development effort and setting realistic expectations.

The data journey progresses through distinct stages: initial capture in operational systems, extraction and integration into data platforms, transformation and quality enhancement, and finally presentation in analytics solutions. The development effort varies dramatically based on the starting point—minimal work is required when quality data already exists in the data platform but simply needs to be surfaced in reports, while substantial investment is needed when core business processes lack consistent data capture mechanisms. By mapping each required data asset to its current stage in this journey, organizations can better sequence their initiatives, identify quick wins where data is analytics-ready, and plan for longer-term investments where foundational data capture or integration work is required.



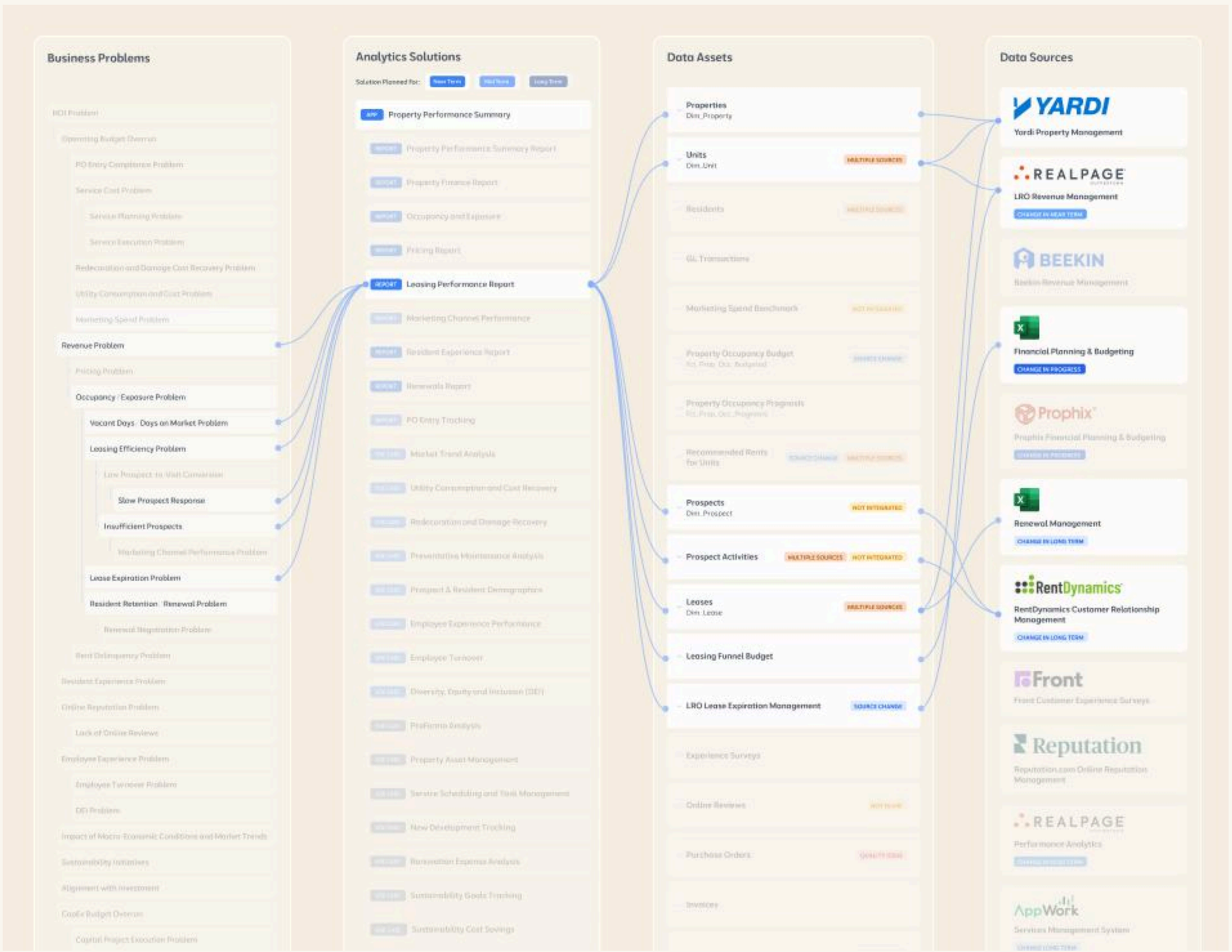
Key stages data goes through to become data asset

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Connecting the Layers

The true value of the assessment emerges when we connect all three layers—business problems, analytics solutions, and data assets—into an integrated lineage view. This holistic mapping reveals the complete chain of dependencies. When evaluating a high-priority business problem, stakeholders can immediately see all required analytics solutions and trace them back to specific data sources, exposing gaps or quality issues that must be addressed. Equally important, when a source system undergoes changes or migrations, the lineage view identifies all downstream impacts—which analytics solutions will break, which insights will be compromised, and ultimately which business decisions will be affected.

This lineage view transforms abstract discussions about data investments into concrete conversations about business impact, enabling stakeholders to make informed decisions about what to build, understand the full scope of effort required, and justify investments based on clear business value.



An example of the data & analytics value lineage

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Understanding the Personas

Analytics personas are archetypal representations of distinct user groups within an organization who interact with data and analytics in fundamentally different ways. Each persona embodies specific characteristics including their business objectives, decision-making contexts, and technical proficiency levels. These personas extend beyond simple role definitions to capture the motivations, pain points, and workflows that shape how different stakeholders consume and act upon analytical insights.

Analytics personas enable strategic prioritization by identifying which user groups drive the most critical business decisions and highest-value outcomes, allowing D&A teams to sequence initiatives based on actual business impact rather than technical considerations.

Understanding and designing for analytics personas is critical for maximizing the value of data initiatives. When organizations fail to account for these differences, they often experience low adoption rates and lack of meaningful actions that improve business outcomes.



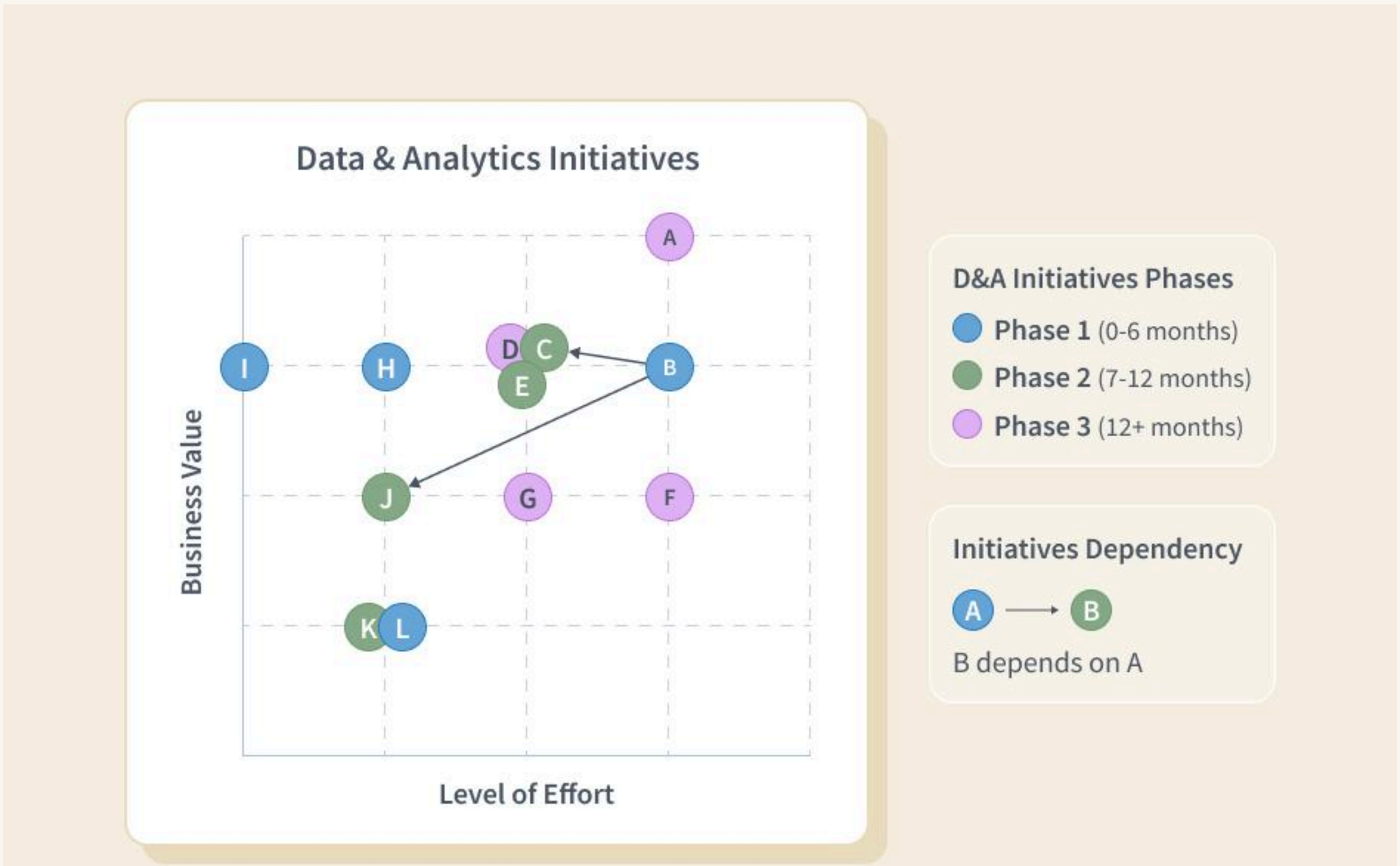
An example of analytics persona with a subset of attributes

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Prioritization

With complete lineage visibility from business problems through analytics solutions to data sources, organizations can more accurately assess what's required to enable data-driven decision-making for each business problem, and prioritize what needs to be built first.

Effective prioritization balances potential business value and estimated effort. While quantified ROI might be preferred, calculating it might require sophisticated modeling and turn into a project of its own. Gathering qualitative input from business leaders may be a quicker alternative. Implementation effort includes not just technical complexity but also data readiness, organizational change management, and resource availability. Other factors such as technical dependencies and likelihood of success based on data quality and user adoption readiness, should also be considered. The resulting roadmap sequences initiatives to deliver quick wins that build momentum while systematically developing capabilities for transformational change, ensuring that each investment builds upon previous work and creates compounding value over time.



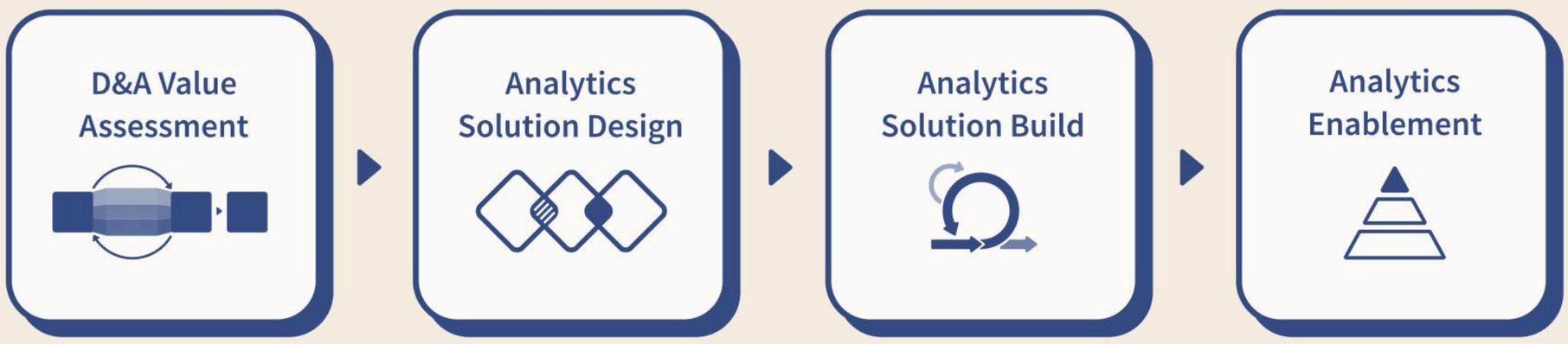
An example of D&A initiatives prioritization

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What’s Next?

Once the D&A strategic roadmap is established, organizations must translate high-level initiatives into actionable implementation plans with interconnected work streams, including analytics solution design, data and BI platform foundations, solution build, and analytics enablement.

At Axis, we don't just plan – we execute. We'll guide you through every step of your data and analytics journey, from identifying your most critical needs to designing and building the solutions that deliver real results. Our unique Analytics Enablement framework ensures your team can effectively adopt these solutions to drive meaningful business value.



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Get In Touch

Ready to transform your data and analytics capabilities into measurable business value? Our team of experts can guide you through the comprehensive value assessment process, helping you build a strategic roadmap that aligns investments with business outcomes.

Whether you're looking to optimize existing analytics solutions, identify high-impact opportunities, or build a data-driven culture across your organization, we'll work with you to create a customized assessment that addresses your unique challenges and objectives. From initial discovery workshops through roadmap development and implementation planning, we partner with you every step of the way to ensure your D&A initiatives deliver lasting value.

Contact us today (design-enablement@axisgroup.com) to schedule a consultation and learn how our D&A Value Assessment can accelerate your analytics transformation journey.

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