



EVERY JOURNEY NEEDS A **MAP**

Accelerate Your Data Innovation Journey

RYAN SOUSA AND MARYJO STOJAK

TABLE OF CONTENTS

- 3 START YOUR JOURNEY**
- 3 ANATOMY OF A MAP**
 - I. Map Contributors
 - II. Analytics Landscape
 - III. Charter and Operating Model
 - IV. Strategic Itinerary
- 5 ACTIVATING THE JOURNEY**
- 8 GUIDING PRINCIPLES**
 - I. Communication Is Key
 - II. Honor the Scrum Ceremonies
 - III. Shift the Mindset
 - IV. Avoid Analysis Paralysis
- 9 FINAL THOUGHTS**
- 9 ABOUT THE AUTHORS**



Data innovation has emerged as a key driver for transformative change within the healthcare industry. The powerful maturity accelerator plan (MAP) enables an accelerated data innovation journey. By embracing the MAP, healthcare organizations can unlock data's true potential, revolutionize patient care, and shape a brighter future for the industry.

▼ **START YOUR JOURNEY**

The MAP is the action plan for the data innovation journey, and it aligns the analytics community with the organization's current state, strategic vision, and blueprint for arriving at the future state.

MAPs are tailored to an organization (including nomenclature and cultural tone) and architected to reflect each organization's data innovation journey, including the progression from current state to achieving the organization's strategic goals and priorities. As the MAP evolves, it becomes a multi-tool critical resource (like a Swiss Army Knife) in addition to serving as the strategic roadmap.

▼ **ANATOMY OF A MAP**

Building a MAP is not a one-and-done activity. Begin with a baseline plan and an understanding that the MAP will evolve as information is learned and opportunities are identified. Five key areas for building the MAP are outlined below. These areas should be considered from the beginning to mitigate future scrambling and the risk of overlooking beneficial factors.

Building a MAP is not
a one-and-done activity.

1| MAP CONTRIBUTORS

As a simple but significant component, organizations should broadly acknowledge the value of the MAP contributors. This awareness helps demonstrate the existing buy-in throughout the organization and it generates additional support.

2| ANALYTICS LANDSCAPE

Similar to a mini-business plan, the analytics landscape outlines the current state, desired destination, and the reason for embarking on the journey. In our recent article, *Thinking Like an Entrepreneur*, we talk about the importance of defining the "Why." As stated by Simon Sinek, the author of *Start with Why: How Great Leaders Inspire Everyone to Take Action*, "People don't buy what you do, they buy why you do it." Developing the analytics landscape includes conducting a SWOT (strengths, weaknesses, opportunities, and

threats) analysis. Understanding these aspects at the outset and throughout the journey aids in making informed decisions.

To answer the “Why,” consider addressing each of the following questions with a visual response:

- What is the opportunity (e.g., your organization’s strategic vision)?
- Where are we today (e.g., a representation of your current data and analytics ecosystem)?
- Where are we heading (e.g., desired future state)?
- How will things change (e.g., changes to data access and analytics)?

Because words are subject to interpretation, adding visuals or images enhances the message’s effectiveness and community engagement. Creating the right visual takes time. Therefore, limit the focus on the visual’s initial quality knowing that it will evolve as members of the community provide feedback. The goal is to ensure all stakeholders share the same vision and understanding before commencing the journey.

3| CHARTER AND OPERATING MODEL

Complementary to defining the “Why” is clarifying the team’s purpose. A clear, concise mission and vision statement unites and aligns members of the analytics community, each of whom may vary with respect to reporting relationships and expertise (e.g., business, clinical, technical). The charter outlines the delivery teams and their respective focus area, the stakeholder community, governance structure, scope, scope exclusions, and success metrics. The delivery teams’ focus will vary by organization due to each organization’s strategic and operational priorities and level of data fluency.

4| STRATEGIC ITINERARY (ROADMAP)

The roadmap is a rolling 12-month and high-level view of planned work and, furthermore, the approach to completing such work. It is built to reflect an organization’s starting point (data maturity baseline), desired destination (strategic goals and priorities), and operating model evolution.

MAP-related work is typically defined every two weeks and, therefore, developing a highly detailed 12-month roadmap is unrealistic. More importantly, the roadmap sets the direction and shows incremental value over time. The objectives and key results (OKRs) provide the necessary detail for each respective quarter and specify the key results for each objective set by each delivery team.

Work is organized by key business areas and each area is supported by its own delivery team, each of which will have its own MAP.

A clear, concise mission
and vision statement unites
and aligns members of the
analytics community.



▼ **ACTIVATING THE JOURNEY**

Once the key components of the MAP are clearly defined and understood by all key stakeholders, the following eight steps are undertaken to create the MAP.

1| CONDUCT THE ASSESSMENT

Review your organization's current data and analytics maturity.

Utilize a data and analytics maturity assessment tool to understand an organization's current state, which is critical to commencing the data innovation journey. The results indicate an organization's maturity level in comparison to best-in-class standards and, furthermore, inform the key tasks necessary in preparing for the data innovation journey.

During the assessment, a clear understanding of the current data innovation challenges should be gained via individual and group discussions with stakeholders and all those interested in participating in the journey. It is an excellent opportunity to gather various perspectives related to the present state and ideal future and, furthermore, to develop and practice sharing the benefits (to the organization, team, and individual) of the data innovation journey, and engage the community in the journey. Although the discussions require extensive time, they are incredibly important for understanding stakeholders' needs and effectively representing the community.

2| IDENTIFY GOALS AND OBJECTIVES

List priorities of goals and create the executive sponsor team.

Analyze the data maturity assessment results to identify the large pieces of work that need to be executed to support strategic and operational priorities within the next 12 months. In parallel, identify the executive sponsor team (E-team) members who will represent operations, providers, and IT. A common configuration is COO, CMO, and CIO; however, the E-team can also encompass the CFO, CNO, and CIO. More importantly, the E-team leaders should report to the CEO and be respected for their ability to deliver, believe in the importance of analytics to their success, have a vested interest in data, and possess the aptitude to grow. Since research is often a component of the analytics community, the CRO or CSO can be

expected on the E-team, expanding it to more than three executive leaders.

3| DEVELOP THE MAP COMPONENTS

Create the maturity acceleration plan.

Draft the MAP's various components. Sufficient information should result from steps 1 and 2 to help identify the focus areas and investments for the next 12 months. As the MAP develops and evolves, it should be socialized with the analytics community to secure feedback on the story.

4| BEGIN WITH TWO DELIVERY TEAMS

Build a rolling 12-month strategy.

Begin with two teams: a DataOps delivery team and an end user-focused delivery team (e.g., clinical excellence, revenue cycle, patient flow, clinical research). DataOps is a methodology that leverages developers, data engineers, operational specialists, and data scientists to bring agility and speed to the end-to-end pipeline process, beginning with the data collection and ending with delivery. The DataOps delivery team is responsible for the data and analytics/AI platform and supports all other delivery teams. The end user-focused delivery team encompasses individuals who represent the needs and interests of people who will use and interpret the data. Ideally, delivery teams should start in an area with high visibility and impact, with some analytics in place, and be willing participants (business and clinical) who desire to accelerate their area's data innovation journey.

The teams will work in two-week sprints. The early sprints (sprints 1-4) are typically bumpy as the new teams learn to work together. The additional value the team will deliver once they are working at maximum potential will be far greater than if they did not shift to this operating model.

Delivery teams leverage a modified version of Scrum. The team composition will vary based on the focus

area; however, each team typically includes 5-8 people with diverse skills and is comprised of:

- The product owner: an individual with a deep understanding of the business area they represent and an affinity for technology.
- The development owner (dev owner): an individual with a deep understanding of the technology and an affinity for the business.
- 3-6 additional people (e.g., data engineer, data analyst, data scientist, software engineer, security, DataOps, data architect) with expertise based on the focus area and type of work this team will execute.

The product owner maintains a backlog of work and sets the priorities based on the input they collected from the stakeholder community, as defined by their charter. Based on those needs, the dev owner determines the technologies to be used, method for creating technical collaboration across delivery teams, and the quality or work product for the rest of the team. The delivery team takes guidance from the product and dev owners, and each Scrum team member decides the work that can be completed in each sprint.

A key factor in selecting an area of focus for a delivery team is whether it aligns with strategic and operational priorities. Delivery team examples include:

- Clinical (e.g., patient flow, clinical excellence, quality and safety, mental and behavioral health, health equity, surgical services, ambulatory, medical specialties, critical care, integrated care network, clinical value)
- Business operations (e.g., supply chain, revenue cycle, finance, strategy, human resources, facilities, donor management)
- Research (e.g., clinical research, basic science, systems medicine)
- Data and analytics/AI technology (e.g., DevOps, DataOps, platform services)

5| ASSESS THE NEXT FOCUS AREAS

Identify the next few focus areas for subsequent delivery teams.

Start by identifying the highest business need (where the most value can be delivered and significant challenges can be addressed), and then consider the leadership in those areas. Are they willing to consider a change in exchange for greater business value over 6-12 months? If there is hesitance or resistance to change, find others who are more accepting and willing. Our contributing blog on the IIA's website, *Thinking Like an Entrepreneur*, highlights the importance of identifying the champions and ambassadors, as well as those who are less excited about, or working to stop, the journey. Over time, as more delivery teams demonstrate value, the most resistant areas will begin to take interest and engage.

Once an area is selected, the product and dev owner create a MAP for their delivery team. This is similar in purpose and structure to the enterprise-level MAP. The most significant difference is scope. Once the E-team reviews and provides additional feedback on this delivery team MAP, the delivery team is launched.

The beauty of a
Scrum-like approach is the
ability to start with what you
know, refine, and
continuously improve.



6| BUILD BACKLOGS AND DEFINE OKRS

Delivery teams build their backlog and define their OKRs for the quarter.

John Doerr's book *Measure What Matters: How Google, Bono, and the Gates Foundation Rock the World with OKRs* shares a practice and process that has yielded success in many organizations. OKRs change regularly (e.g., quarterly), relate directly to the MAP's success, are closely tied to an organization's strategic and operational priorities, and help determine success along the way, providing information to adjust or stay the course. Whereas key performance indicators (KPIs) are tied to performance (e.g., system health, employee goals, customer response).

An Agile-like delivery process (outlined in our [Operating Like a Startup](#) article) is recommended for tracking and reporting. With an Agile methodology, the team and stakeholder community review progress every two weeks, which provides transparency related to planned and accomplished work.

As an iterative approach, an Agile-like delivery process does not have to be perfect before starting. Projects can become stuck in the planning phase; therefore, teams may continue to plan or may limit the planning. The beauty of a Scrum-like approach is the ability to start with what you know, refine, and continuously improve.

7| ASSESS PROGRESS AND DEFINE NEW OKRS

Activate the operating model.

To accomplish this, each delivery team owns their work, focuses on delivering value for the respective business area, and defines their OKRs for the quarter to frame their sprints and report progress. Work for each sprint is defined and assigned, progress is documented, and a tracking system maintains the backlog.

The product owners work closely with key individuals from the stakeholder group to identify and align

the priorities. The dev owner works closely with peers and other data and technology experts to minimize redundancy, maximize reuse, ensure quality deliverables, and work toward data innovation.

The first six months can be bumpy; however, teams should be encouraged to continue, knowing that a smooth path forward is being paved.

8| ORGANIZE QUARTERLY GOVERNANCE AND BUSINESS REVIEWS

Perform governance and regular business reviews.

Each quarter, the leaders of the delivery teams gather with their peers to share progress on their OKRs for the recently concluded quarter and present their OKRs for the upcoming quarter.

Goals for the peer-to-peer discussion include:

- Enable the delivery team leadership to address issues around data ethics, data governance, and data fluency.
- Ensure alignment across teams (especially for those contributing to a cross-organization effort) and with the MAP's evolution.
- Create awareness of the technologies and approaches used by each delivery team to solve a challenge or issue, allowing others to leverage the learnings and save time or prevent missteps.
- Inspire data innovation.

The product and dev owners of the delivery team meet with the E-team to perform a similar, but higher-level review or update. Although the meeting does not serve as a means to request approval or gain permission to proceed, securing feedback from the E-team members is critical to ensure the delivery team remains aligned with strategic plans and adjusts priorities as necessary. Additionally, the E-team members expect to share relevant updates from their delivery teams with the rest of their organizations.

▼ GUIDING PRINCIPLES

COMMUNICATION IS KEY

Effective leaders motivate and excite people, rather than pull people along. Keeping people informed, encouraging participation, and listening to and addressing their feedback and ideas are key to strong leadership. Having consistent processes, such as the Scrum ceremonies are designed to help achieve these outcomes.

HONOR THE SCRUM CEREMONIES

It's incredibly important that all involved are kept up to date and have a chance to weigh in along the way. The ceremonies include:

- Delivery team huddles: 15-20 minutes each day (at least M-Th).
- Backlog grooming: one hour every two weeks (ideally a few days before the end of the sprint) in advance of sprint planning; used by the product owner to set priorities for the sprint planning session.
- Sprint planning: one hour every two weeks (ideally the afternoon of the last day of the sprint or the morning of the next sprint) to align on the scope of the sprint.
- Sprint review: one hour every two weeks (ideally the morning of the next sprint) to align on the progress of the sprint that is concluding.
- Sprint retrospective: 30 minutes every two weeks (ideally immediately after the sprint review and before the sprint planning) to identify aspects that went well and that did not go well and agree on any work the delivery team will include in the next sprint (or add to the backlog) to address things that did not go well.
- Stakeholder meetings: as needed, members vary depending on the scope of the sprint.
- Advisor team huddles: monthly meeting with end user representatives to share progress and solicit guidance.
- E-team huddles: executive meetings that often begin with a monthly cadence and, as the community is formed, the meetings evolve to quarterly or semi-annual.

SHIFT THE MINDSET

Understanding the reason previous efforts failed is critically important to avoid repeating challenges. Organizations must remain curious to determine activities, initiatives, and approaches that will enable success.

In our collective 60+ years of navigating complex change, new initiatives rarely proceed smoothly 100% of the time. At least one major challenge arises, and many experience several obstacles that need to be overcome due to poor or no communication, lack of preparation, or a "can't-do" mindset. *Thinking Like an Entrepreneur* outlines suggestions for encouraging a can-do mindset and bringing others along.

AVOID ANALYSIS PARALYSIS

In the realm of data innovation, analysis is critical. But too much can be paralyzing. The beauty of the MAP is its iterative nature. Start with just enough to create initial momentum. Adjust course (when needed) along the way. Set the 12-month goal and monitor progress quarterly using OKRs. Allow the delivery teams to focus and work. Work in two-week sprints to mitigate analysis paralysis. Trust the process and let it unfold for the first 3-6 months. Our experience has shown that this approach works well and delivers business value (e.g., cost reduction, improvement in care, increased access) more quickly.

▼ FINAL THOUGHTS

The data innovation journey in healthcare holds immense potential for transforming the industry and improving patient outcomes. By embracing the MAP framework and adopting a startup mindset, organizations can effectively navigate the uncertain terrain with curiosity, creativity, and resourcefulness. Preparation, communication, and maintaining a shared vision are key to the successful evolution of an organization's data innovation journey.

Join us as we shape the future of healthcare through data innovation. Contact us to learn more about how the MAP framework can accelerate your data innovation journey. Together, we can create a healthier and brighter future for all.

▼ ABOUT THE AUTHORS

Ryan Sousa

CONSULTANT
PIVOT POINT CONSULTING
RSOUSA@PIVOTPOINTCONSULTING.COM

Ryan is an experienced senior leader with proven success powering data innovation that spans 30+ years and multiple industries, including healthcare. Leveraging analytics and AI at scale, Sousa has streamlined operations, promoted innovation, accelerated research, and enriched the consumer and employee experience.

In addition to serving as the SVP for two start-ups acquired by Amazon and Nokia, Ryan led the successful implementation of large-scale analytics at Amazon, Expedia, Starbucks, and MCI. More recently, he led the analytics transformation at Seattle Children's as the Chief Data & Analytics Officer (CDAO). In addition, Sousa is the co-inventor and board advisor to a commercial software spinoff, AdaptX.

Currently, Sousa is the practice leader for analytics and AI at Pivot Point Consulting and the CDAO at Children's Minnesota.

MaryJo Stojak

CONSULTANT
PIVOT POINT CONSULTING
MSTOJAK@PIVOTPOINTCONSULTING.COM

MaryJo Stojak is an experienced leader and management consultant with extensive success that spans 25+ years across multiple industries. In the past five years, she shifted her focus from retail to healthcare. She is passionate about creating transformative digital experiences founded on solid data quality and advanced analytics to enrich provider/patient and employee lives, streamline operations, promote innovation, and make getting care as simple as online shopping.

Stojak has led the successful strategy development, product development, and implementation of large-scale, cross-organizational digital and data innovation initiatives at Seattle Children's Hospital, Walgreens, Premera Blue Cross, Starbucks, Amazon, and several other Fortune 20 and start-up companies.