

# From disconnected data to clear decisions

How to get your systems working for you · Hosted by Jason Rainbird & Claudine Reid MBE

Use this sheet to follow along and capture notes as we go.

## 5 KEY TAKEAWAYS

- 1 Clarity before implementation**  
Don't buy tools to fix confusion. Define the decisions you need to make first - then design the data and process to support them.  
*Your note:* \_\_\_\_\_
- 2 Honestly assess what you have today**  
Map current systems, processes and data. Find the gaps, the duplication, and the workarounds people built to survive.  
*Your note:* \_\_\_\_\_
- 3 Get the foundations right before scaling**  
Single source of truth, clean ownership, repeatable process. New tools amplify what's there - including the mess.  
*Your note:* \_\_\_\_\_
- 4 Better process + better data = better decisions**  
When the inputs are trusted and the flow is clean, decisions get faster, clearer and more confident.  
*Your note:* \_\_\_\_\_
- 5 This is the real platform for growth**  
Tools come and go. A clear operating system for your business is what compounds - and is hard for competitors to copy.  
*Your note:* \_\_\_\_\_

## 3 QUESTIONS TO ASK YOURSELF

### DATA & GAPS

Where in your business is a decision being made today on data you don't fully trust - and what's it costing you?

### FOUNDATIONS

If you removed every tool tomorrow, would your core process still hold together - or is the tool the process?

### MINDSET

Who needs to go first - leadership sponsoring the change, or employees showing it works? How do you bridge the two?

## MY NEXT THREE ACTIONS

- \_\_\_\_\_  
*By when?* \_\_\_\_\_
- \_\_\_\_\_  
*By when?* \_\_\_\_\_
- \_\_\_\_\_  
*By when?* \_\_\_\_\_

# Are you ready to turn data into decisions?

A 20-point self-assessment across data, process, foundations and mindset.

Tick what's true today. The gaps are your roadmap.

## DATA

- We have one trusted source of truth for our key business data
- Our customer / job / product records are clean, current and de-duplicated
- We know which decisions we cannot confidently make today because of data gaps
- Reports are generated from systems, not rebuilt manually in spreadsheets
- Data ownership is clear - someone is accountable for each core dataset

## PROCESS

- Our core operational processes are documented end-to-end (not just in people's heads)
- Hand-offs between teams are defined, with no silent re-keying of information
- We can describe our quote-to-cash (or equivalent) flow on a single page
- Workarounds and shadow spreadsheets are mapped, not ignored

## FOUNDATIONS

- Our systems talk to each other where they need to - no critical manual bridges
- We have a clear view of which tools are core, which are duplicates, which are unused
- New tools are chosen to fit the process, not the other way around
- We measure adoption, not just deployment, after rolling out a system

## MINDSET

- Leadership actively sponsors the operational changes, not just the tech purchase
- Employees understand the 'why' behind changes and can see what's in it for them
- We treat data and process as a competitive asset, not an IT problem
- We make time to step back and improve the system - not only run it
- We're honest about what isn't working, before reaching for the next tool

### YOUR SCORE - ADD UP YOUR TICKS

16–20 You have a strong operating system. Focus on compounding gains.

10–15 Solid foundations, real gaps. Pick the 3 most painful and fix the process before buying tools.

5–9 Tools alone won't help. Start with data, ownership and one documented core process.

0–4. High risk of expensive misfires. Begin with an honest audit before any new investment.

### MY TOP 3 PRIORITIES TO FIX FIRST

1. \_\_\_\_\_  
By when? \_\_\_\_\_
2. \_\_\_\_\_  
By when? \_\_\_\_\_
3. \_\_\_\_\_  
By when? \_\_\_\_\_