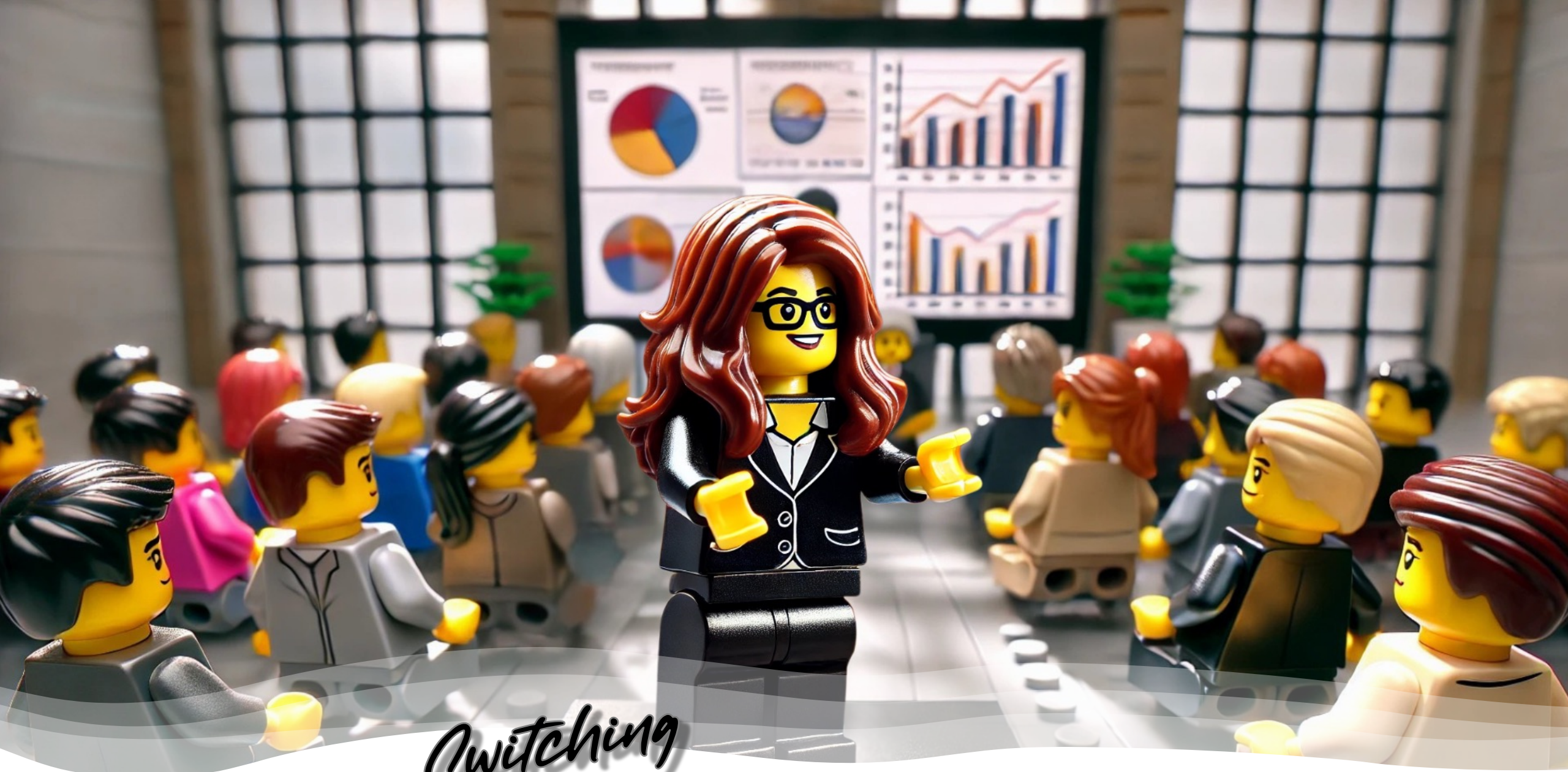




FROM MUDDY WATERS TO CLEAR PATHWAYS: **DATA PROCESS MAPPING FOR** *Smarter Marketing*



Switching **COURTNEYS**



CKearney
Consulting



COURTNEY KEARNEY *CPISM*

WHAT'S YOUR BIGGEST DATA

Challenge?



WHAT HAS YOU IN MUDDY WATERS?



CKearney
Consulting

Collection Hygiene Duplicates Inconsistency
Storytelling
Overwhelm
Upkeep Garbage Entry
Inefficiencies
Integrity
Proactive Collection
Chaos Outdated
Duplicates Inconsistency



WHAT HAS YOU IN MUDDY WATERS?



CKearney
Consulting

WHAT'S THE SOLUTION?

Data Process Mapping



WHAT HAS YOU IN MUDDY WATERS?

WHAT IS DATA PROCESS MAPPING?

*visually laying
out **how** data
moves through
your firm*



WHAT HAS YOU IN MUDDY WATERS?

DATA PROCESS MAPPING

- shows *who* does what & when
- shows where *data* is created, edited & used



WHAT HAS YOU IN MUDDY WATERS?



WHY TAKE THE
Time TO
CREATE DATA
PROCESS
MAPS?

“

**A process you can't see
is a process you can't *fix*.**



BENEFITS OF DATA PROCESS MAPPING

- **Clarity.** Help everyone understand the full picture
- **Inefficiencies.** Identify gaps, duplications and break downs
- **Quality.** Catch errors before they cause chaos
- **Hygiene.** Protect data integrity and build healthy habits



“

**Good data isn't extra work.
It's what makes the work *work*.**



BENEFITS OF DATA PROCESS MAPPING

- **Onboarding.** Enhance training with documented processes
- **Consistency.** Establish naming conventions, required fields, approval steps, shared workflows, etc.
- **Automation.** Clean your data before turning to AI





**DATA
CHAOS**

+

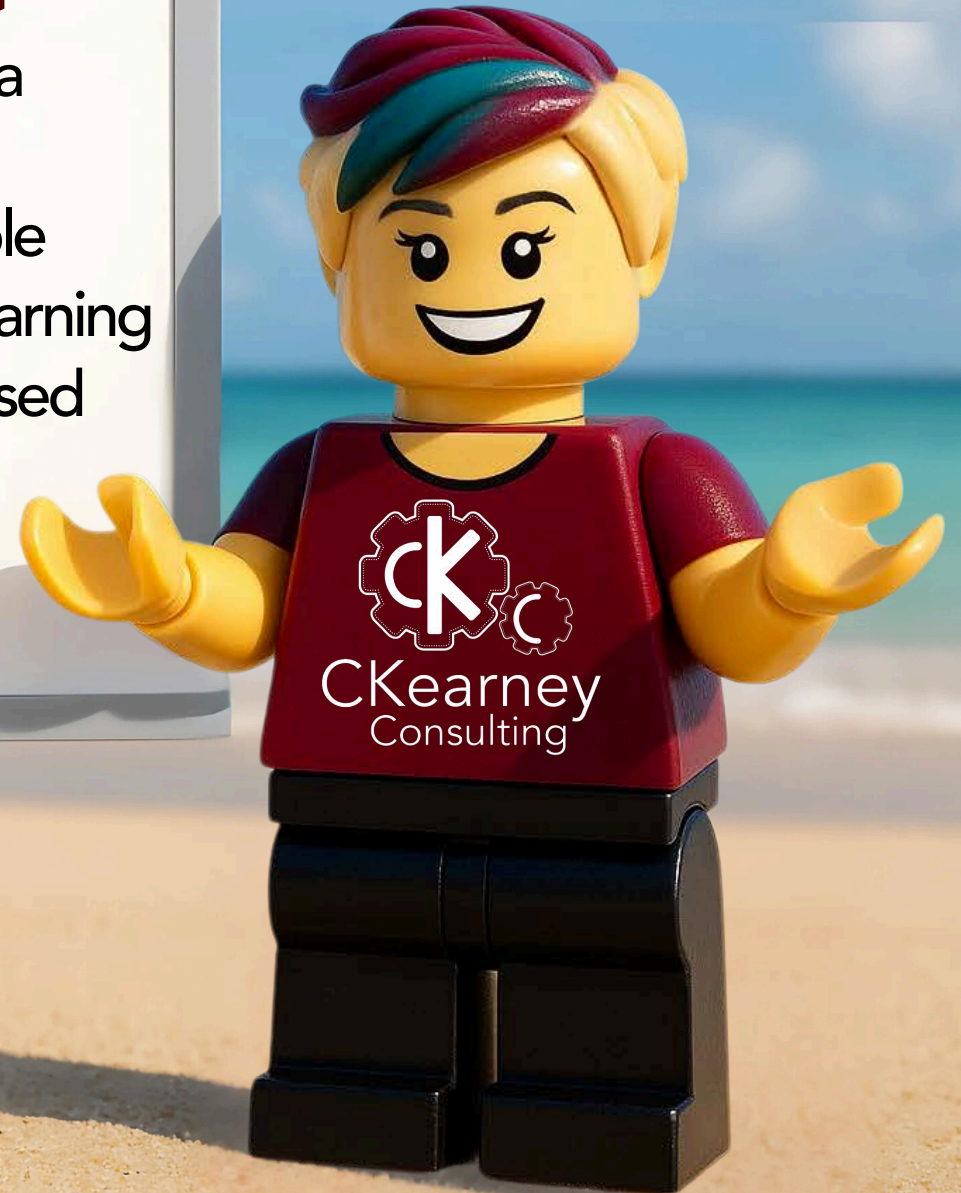
**INEFFICIENT
PROCESSES**



**BAD
DECISION-
MAKING**

DATA-DRIVEN DECISION-MAKING

- **Data-Driven.** Hoarding data is not being driven by data
- **Storytelling.** Simply displaying data is not enough
- **Lifestyle.** Treating data like a crash diet is not sustainable
- **Integrity.** "Garbage in, garbage out" is not a cliché, it's a warning
- **Visibility.** Data that's hard to find & understand is not used



“

If it lives in someone's head,
it *doesn't* exist.



DATA-DRIVEN DECISION-MAKING

- **Proactive.** Using data not just to reflect but to shape what happens next
- **Culture.** Trusting in data is a mindset, not just a skillset





WHAT DOES
culture HAVE
TO DO WITH
DATA PROCESS
MAPPING?

CULTURE OF DATA STEWARDSHIP

- **Purpose.** Explain and lead with the [why](#)
- **Buy-In.** Leadership leads the effort to make data business norms – it's not something "extra"
- **Ownership.** Establish data roles so everyone knows who owns what and what is entered at which stage of the process
- **Accountability.** Establish checks and balances as well as measurable metrics & KPIs
- **Train.** Reinforce and celebrate successes often



“

**Make stewardship part of
everyone's role,
not just an *extra* task.**



DATA ROLES

- **Editors.** Frontline of data entry
- **Auditors.** Monitor data, process and integrations
- **Analysts.** Make sense of the data
- **Consumers.** Utilize the work of the analysts to make DDD
- **Leaders.** Create & maintain policies, standards & processes
- **Data Officer.** Primary role is to drive the firm's use of data while fostering a data culture, holding staff accountable and innovating the use of data firm-wide





DATA ROLES AND *Baseball*



ONE PERSON
cannot
FILL ALL ROLES



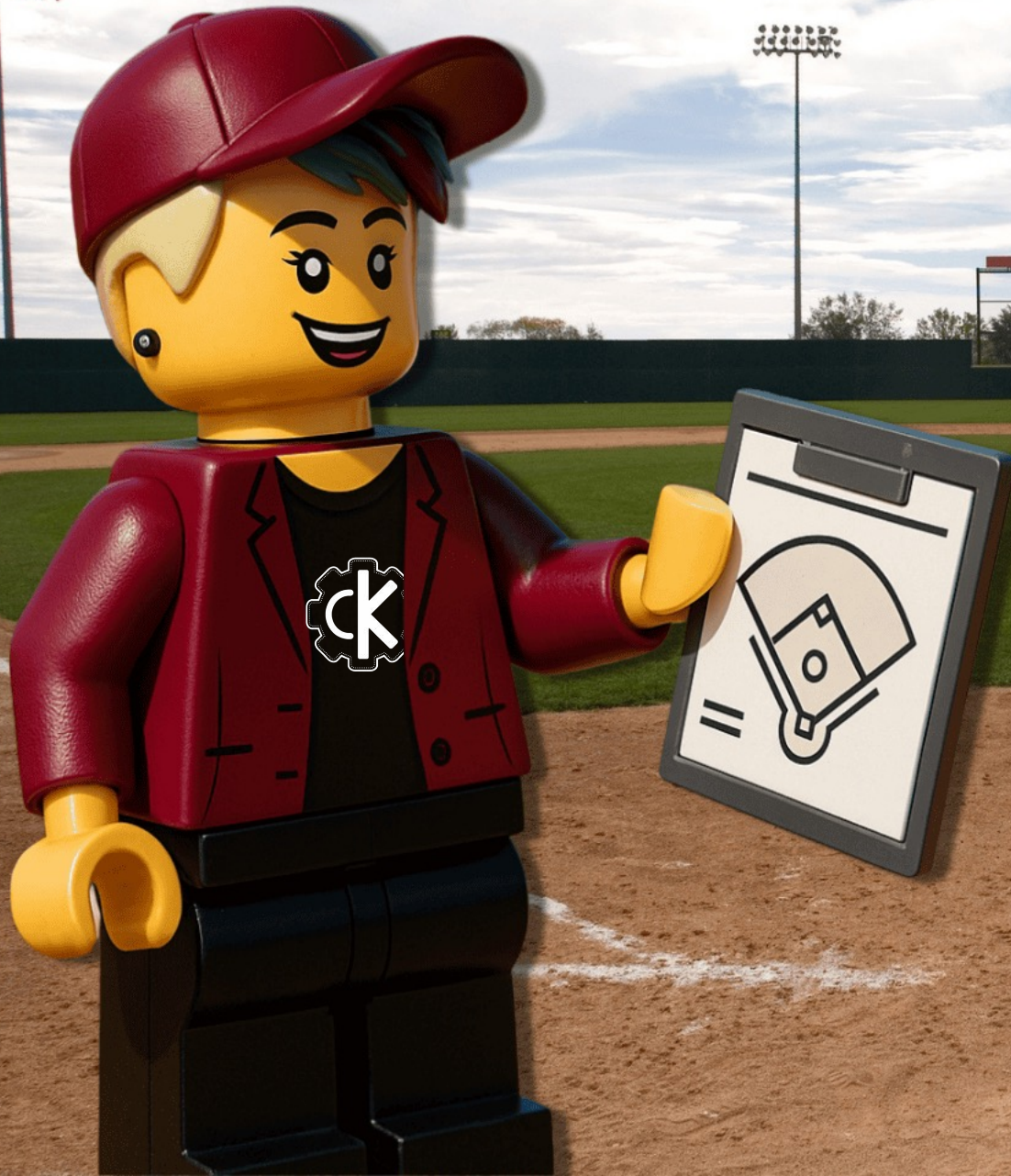
Data Editors



Data Auditors



Data Analysts



Data Consumers



Data Leaders



*Data
Officer*

“

**The goal of a data-driven leader is
to turn data into insight, and insight
into *competitive advantage*.**

~Carly Fiorina





LET'S REVIEW:

- Defined data process mapping
- Benefits of process mapping
- Data-driven decision-making
- Culture of data stewardship
- Six data roles



HOW DO YOU
actually MAP
YOUR DATA
PROCESS?

DATA PROCESS MAPPING STEPS

1. **Define the Goal** – one process at a time
2. **Identify the Steps** – high level flowchart
3. **Add the People/Roles** – who does what & when
4. **Mark Data Points** – what's created, edited & used
5. **Review for Inefficiencies** – duplication, break downs , etc.
6. **Multi-Department** – mktg, accounting, operations, etc.
7. **Integration Review** – systems & workflow
8. **Automate** – notifications, set actions



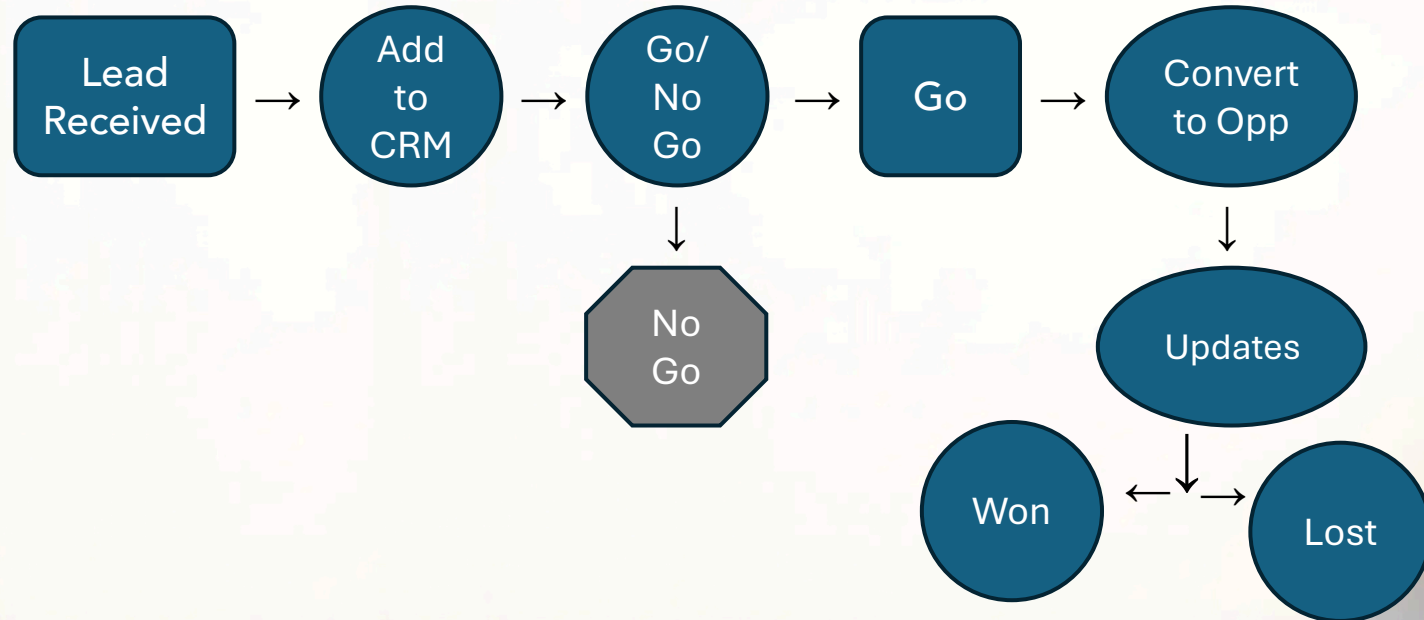
LEAD TO OPPORTUNITY PROCESS MAP

1. Define the Goal – Lead to Opportunity Process Map
2. Identify the Steps

Lead received → Lead added to CRM → Go/No Go →
If it's a Go, it's Converted to an Opportunity →
Weekly Status Updates → It's Won or Lost



LEAD TO OPPORTUNITY PROCESS MAP



Action

LEAD TO OPPORTUNITY PROCESS MAP

3. Add the People

Lead received → **Anyone in the company**

Lead added to CRM → **If CRM user, enter it. If not, send to the designated email**

Go/No Go → **BD Leader completes form in CRM**

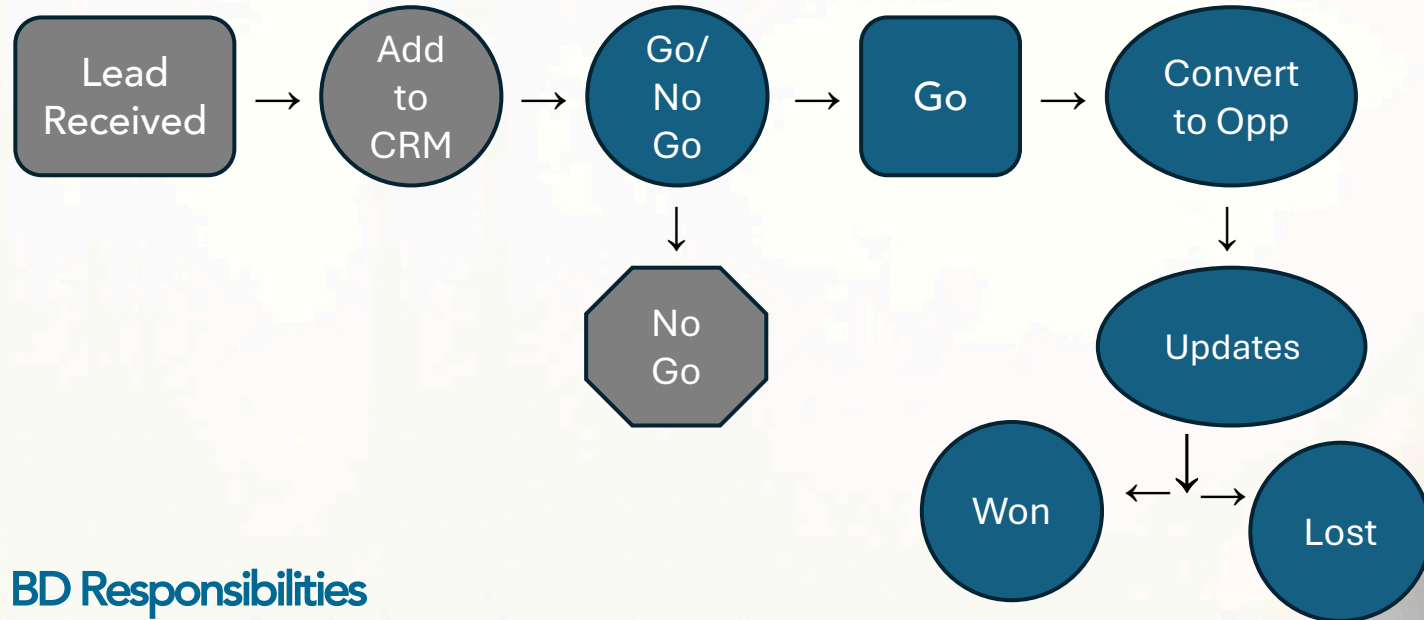
If it's a Go, it's Converted to an Opportunity → **BD Leader**

Weekly Status Updates → **BD Leader**

Won/Lost – **BD Leader**



LEAD TO OPPORTUNITY PROCESS MAP



BD Responsibilities



LEAD TO OPPORTUNITY PROCESS MAP

3. Add the Roles

Lead added to CRM → Entered by Data Editors

Reviewed quarterly by Data Auditors

Trends studied bi-annually by Data Analysts

Discussed bi-annually by Data Consumers

Overseen by Data Officer



LEAD TO OPPORTUNITY PROCESS MAP

Go/No Go → Form reviewed quarterly by Data Leaders and overseen by Data Officer

Weekly Status Updates → Reviewed quarterly by Data Auditors and trends studied bi-annually by Data Analysts

Won/Lost – Updated by Editors, Reviewed monthly by Auditors, Trends studied quarterly by Analysts, discussed quarterly by Consumers and overseen by Data Officer



LEAD TO OPPORTUNITY PROCESS MAP



Data Roles



LEAD TO OPPORTUNITY PROCESS MAP

4. Mark Data Points

Lead received → Project Name & Client Required

Lead added to CRM → All known data entered

Go/No Go → \$ and all categories/tags required

Weekly Status Updates → BD updates prior to staff mtg

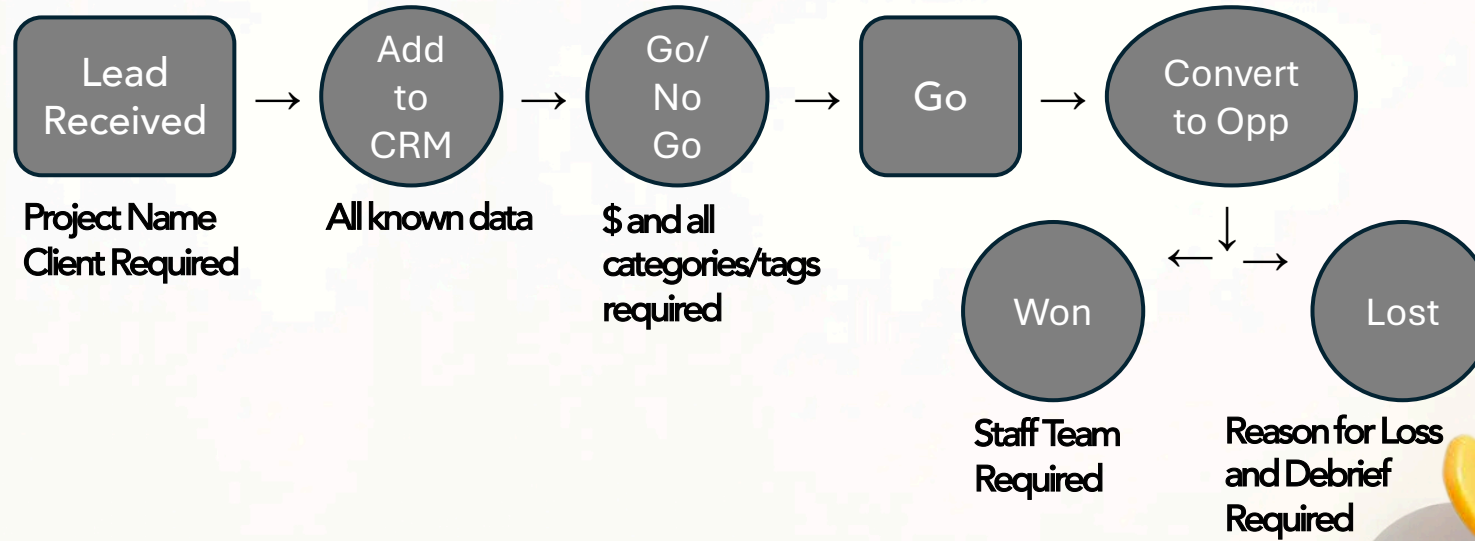
Won/Lost – BD updates. All fields required to finalize.

If won, staff team is required.

If lost, reason and debrief are required.



LEAD TO OPPORTUNITY PROCESS MAP



Data Points



LEAD TO OPPORTUNITY PROCESS MAP

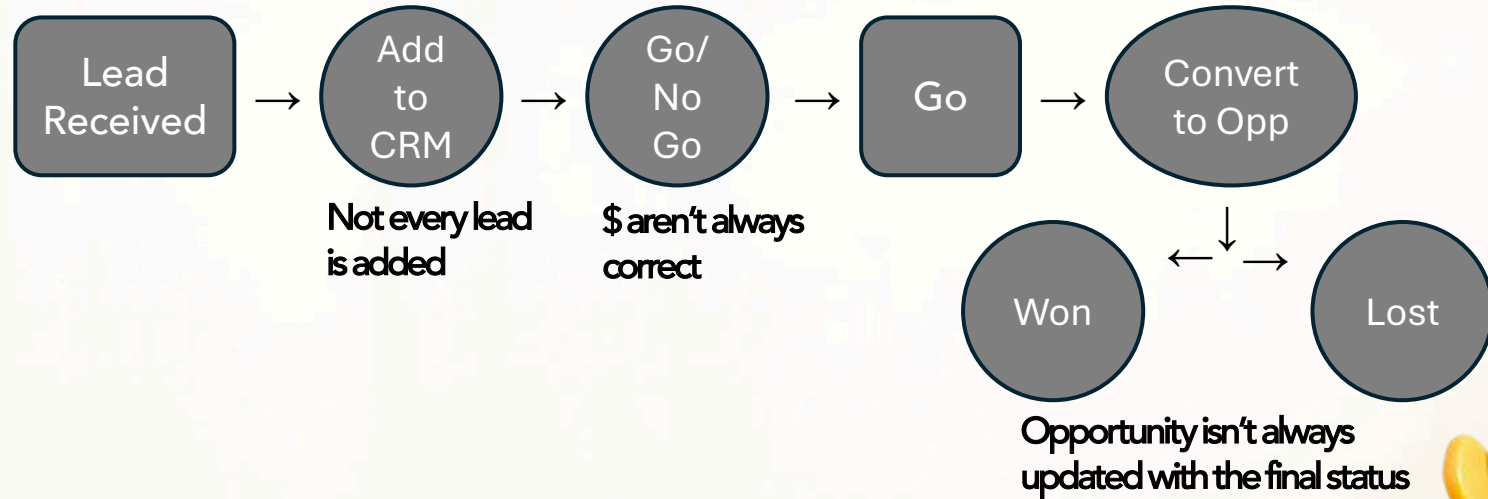
5. Review for Inefficiencies

Lead received → Add to CRM → Not every lead is added
Go/No Go → \$ aren't always correct because it's a required field

Weekly Status Updates → Won/Lost – Opportunity isn't always updated with the final status



LEAD TO OPPORTUNITY PROCESS MAP



Review for Inefficiencies



LEAD TO OPPORTUNITY PROCESS MAP

6. Multi-Department

Lead received → Lack of education outside marketing/BD

Added to CRM → Need more CRM users

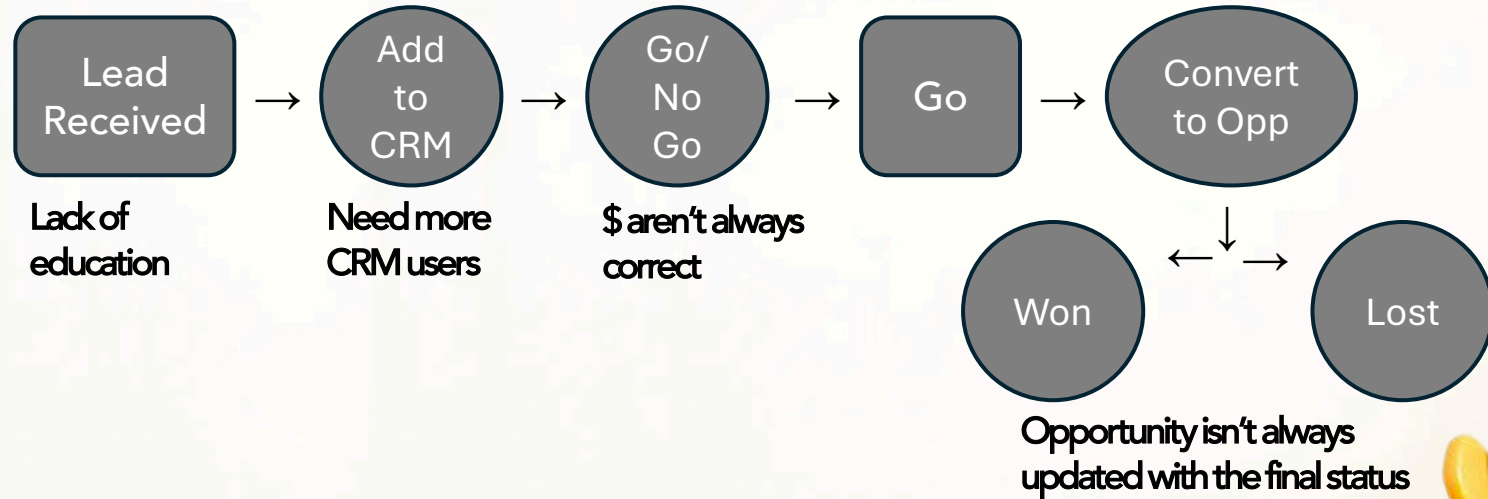
Go/No Go → If it's a Go, it's Converted to an Opp →

Operations needs to know ASAP for workload

Weekly Status Updates → Won/Lost – What if a project number in ERP can't be created until the opportunity record is finalized?



LEAD TO OPPORTUNITY PROCESS MAP



Multi-Department Review



LEAD TO OPPORTUNITY PROCESS MAP

7. Integration Review

Lead received → Could we have a form or email in Outlook for people to complete?

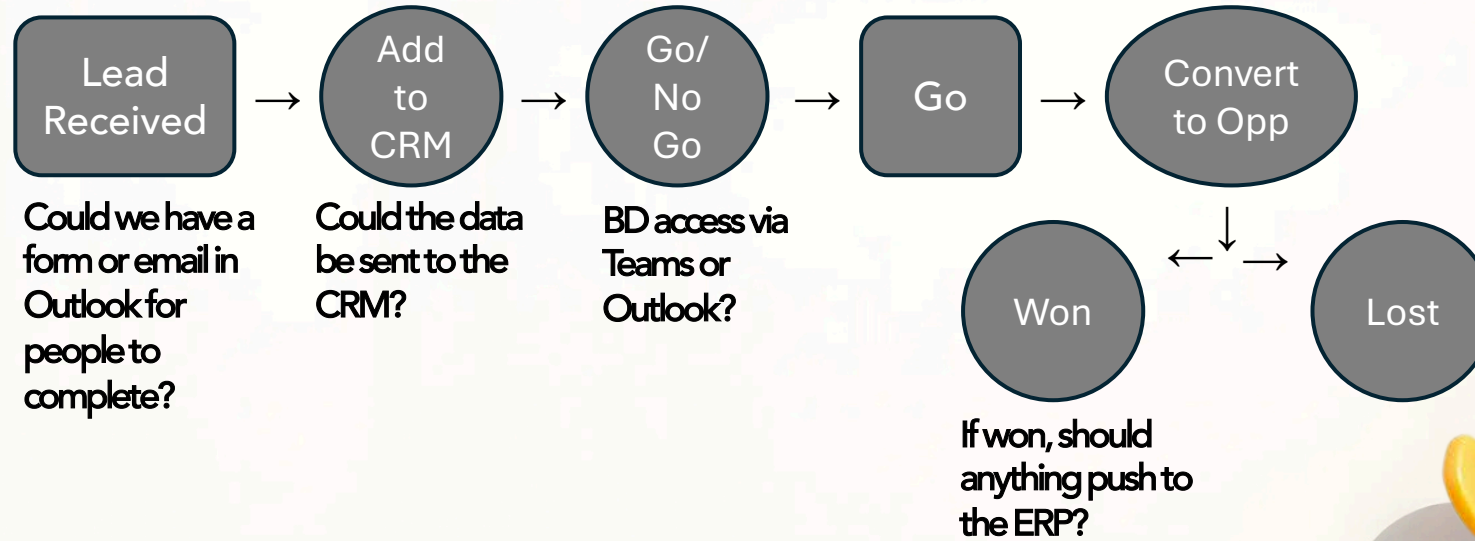
Added to CRM → Could the data be sent to the CRM?

Go/No Go → Weekly Status Updates → BD struggles to make timely updates, could they have access via Teams or Outlook?

Won/Lost – If won, should anything push to the ERP?



LEAD TO OPPORTUNITY PROCESS MAP



Integration Review



LEAD TO OPPORTUNITY PROCESS MAP

8. Automations

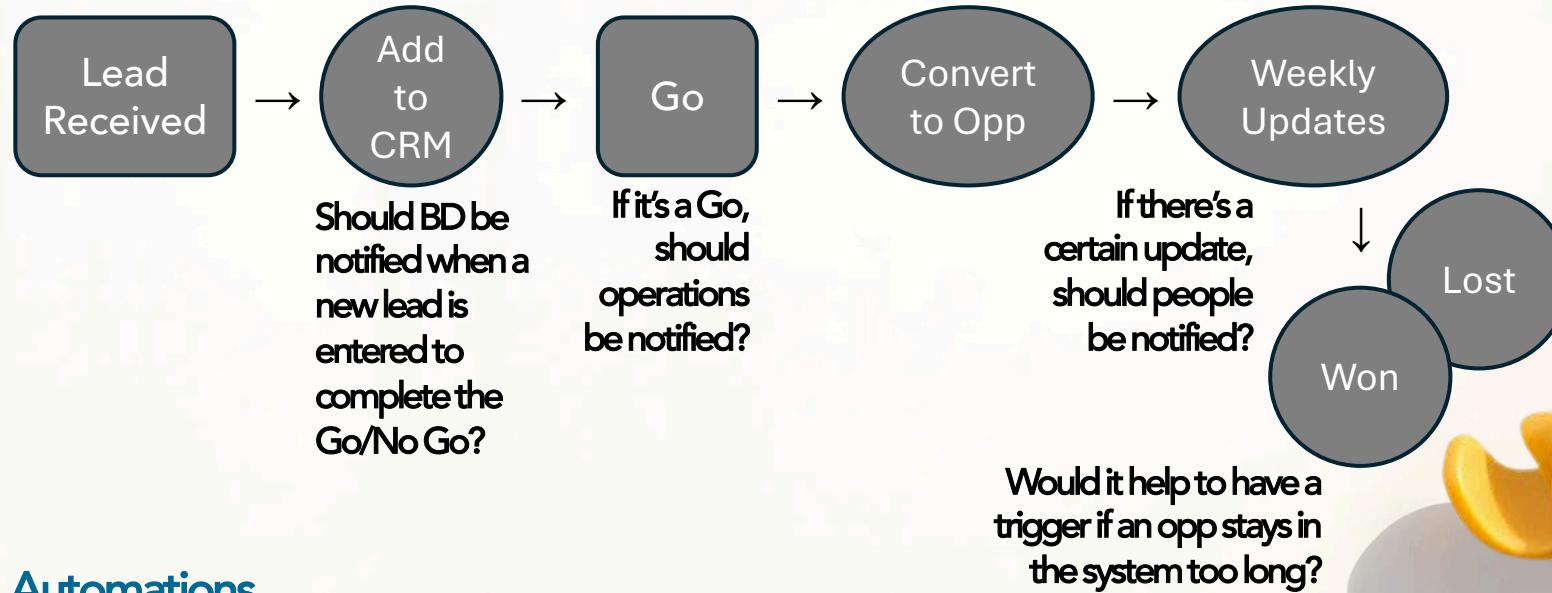
Lead received → Added to CRM → Should BD be notified when a new lead is entered to complete the Go/No Go?
Go/No Go → If it's a Go, it's Converted to an Opp → Should operations be notified?

Weekly Status Updates → If there's a certain update, should people be notified?

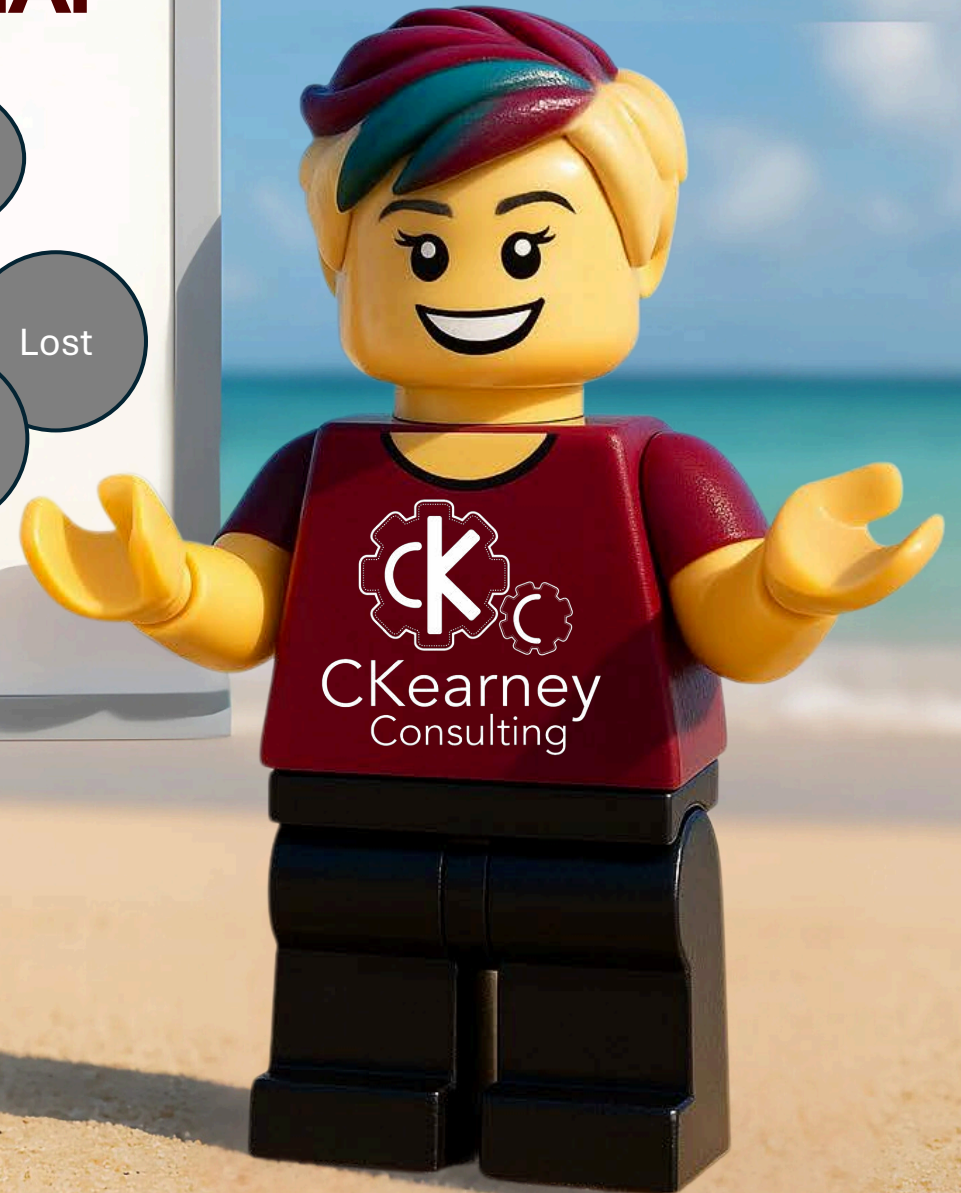
Won/Lost – Alert if an opp stays in the system too long?



LEAD TO OPPORTUNITY PROCESS MAP



Automations



MORE DATA PROCESS MAPS

- Contact and Company Data
- Project Data
- Personnel and Resume Data
- Email Marketing Campaign Data
- Social Media Data Management





WHAT OTHER
PROCESS MAPS
CAN *y'all*
THINK OF?

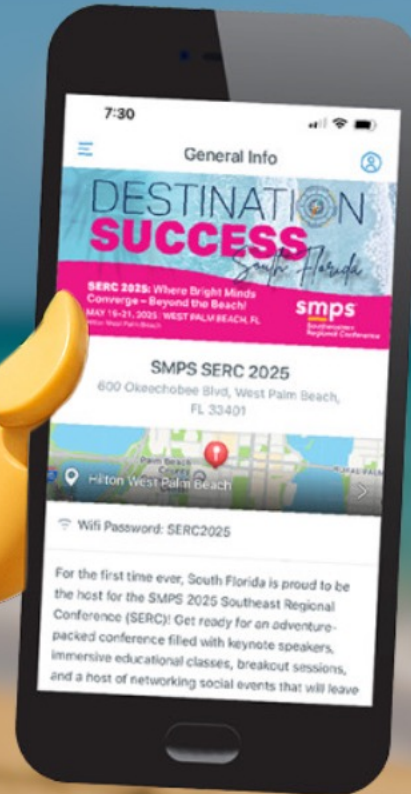


FROM MUDDY WATERS
TO CLEAR PATHWAYS

DATA PROCESS
MAPPING FOR
Smarter Marketing

#LegoDataJourney





**COMPLETE
THE
SPEAKER
EVALUATION**
please

RESOURCES



- Download Slides
- Purchase *CRM or Die*
- Book a Discovery Call
- Attend CRM Chat – June 12
- Attend Data Dialogue – July 10
- Attend Free Webinar – Aug. 14
- Sign Up for Our Emails



QUESTIONS



Thank You

