

DATA STRATEGY TOOLKIT

The SCIKIQ Data Strategy Framework

From vision and business strategy to a data strategy run like a balanced scorecard

THE SO WHAT OF THIS DECK

Use the framework to run your own cascade from vision to the first 100 days. Start with the strategic choices, because every level below inherits them.

THE IDEA IN ONE SENTENCE

A data strategy is not a separate strategy. It is the part of the business strategy that decides which information the organisation must master to win, and how it will measure, fund and govern that.

The strategy cascade

Nine levels. Each one is derived from the level above and tested by the level below.

Vision	The destination, ten years out: what the organisation wants to become and be known for.
Mission	Who the organisation serves, what it does for them and how, today.
Strategic choices	The integrated set of choices: winning aspiration, where to play, how to win, the capabilities that make it possible, and what we will not do.
Strategic themes	Three to five themes that group the strategic objectives into streams of work leaders can own.
Strategy map	Strategic objectives arranged in four perspectives (financial, customer, internal process, learning and growth) and linked by cause and effect.
Data objectives	Data strategy objectives, each one traced to the strategy-map objectives it enables, balanced between offence and defence.
Data scorecard	A balanced scorecard for the data strategy: objectives across value, stakeholder, data operations and capability, each with lead and lag measures, a baseline, a target, an initiative and an owner.
Portfolio	The prioritised use cases, the reusable data products they draw on, and the foundations they depend on, funded through stage gates.
Roadmap and rhythm	The three-horizon roadmap, the first hundred days and the management rhythm: monthly scorecard reviews, quarterly strategy reviews and an annual refresh.
SO WHAT	If a data objective cannot be traced up this cascade to the vision, it is not part of the strategy: cut it or find its business owner.

What good looks like at each level

Level	Good looks like	The data leader's question
Vision	Ambitious, specific enough to rule things out, and memorable enough that people repeat it unprompted.	Which decisions will this future depend on that we cannot make with today's data?
Mission	Names the customer and the value delivered; holds steady while strategies change.	Who are the customers of our data, and what do they need it to do?
Strategic choices	Choices that exclude options. Each how-to-win choice is backed by a capability someone can build.	Which must-have capabilities are data capabilities, and which choices are impossible without them?
Strategic themes	Few themes, each with an executive owner and a clear intent; together they cover the strategy.	Which themes share the same data, so that one investment serves several of them?
Strategy map	Fifteen to twenty-five objectives, each a verb and a noun, with links a sceptical executive would accept.	Which process and learning objectives fail without trusted information? That is where data earns its place.

SO WHAT

Use these tests in the review: any level that fails them weakens everything below it.

What good looks like at each level (continued)

Level	Good looks like	The data leader's question
Data objectives	Every data objective names the business objectives it serves; none exists for its own sake.	If we stopped this data objective, which business objective would fail?
Data scorecard	One or two measures per objective, a mix of leading and lagging, with baselines measured rather than guessed.	Which leading measure will tell us in one quarter that the lagging one will move in a year?
Portfolio	Use cases ranked on value and feasibility; data products built once and used many times.	Which data product unlocks the most use cases, and is it funded as shared infrastructure?
Roadmap and rhythm	Reviews that test the assumptions and move money, not status meetings.	What would have to be true for us to stop, start or re-fund an initiative this quarter?

The trap at each level

Level	The common trap
Vision	A vision so generic it could belong to any competitor, so nothing below it has to change.
Mission	Confusing the mission with a list of products or a slogan.
Strategic choices	A list of goals with no choices: growing everywhere, for everyone, on every dimension.
Strategic themes	Themes that mirror the org chart instead of the strategy.
Strategy map	Objectives with no links: a list dressed up as a map.
Data objectives	Data objectives written as technology projects: migrate, implement, upgrade.
Data scorecard	Measuring activity (reports built, tools deployed) instead of outcomes.
Portfolio	Funding each use case as a one-off project, rebuilding the same data every time.
Roadmap and rhythm	A roadmap that is presented once and never reviewed.

SO WHAT

Most failed data strategies fall into one of these traps at the top of the cascade, long before technology is chosen.

1

From strategy to themes

Where data earns its place

Strategic themes and the data plays behind them

Theme	Data plays	Leading measure	Lagging measure	Posture
Profitable growth	Customer 360 and propensity models; Price and margin analytics; Pipeline and opportunity intelligence	Share of opportunities with a propensity score in the CRM	Revenue growth in target segments	Offence
Customer experience and loyalty	Journey analytics; Next best action; Service and complaint insight	Share of interactions handled with full customer context	Retention of high-value customers	Offence
Operational excellence	Demand sensing and inventory optimisation; Process mining; Predictive maintenance	Share of plans built on integrated, daily data	Cost to serve and on-time-in-full	Balanced
Risk, resilience and compliance	Risk data aggregation and lineage; Controls automation; Supplier and counterparty risk	Share of critical data elements with an owner and quality rules	Audit findings and restatements	Defence
Innovation and new business models	Connected-product and usage data; Data sharing and partner products; Experimentation platform	Experiments run and read out per quarter	Revenue from new services	Offence
Sustainability	Emissions accounting; Supply chain traceability; Disclosure data controls	Share of priority suppliers reporting primary data	Emissions intensity and assured disclosures	Defence
People and productivity	Self-service analytics; AI assistants on governed data; Workforce analytics	Monthly active users of governed data	Hours released and output per employee	Offence

SO WHAT

Start from the themes your executives already own; the data plays and products follow from them.

2

A balanced scorecard for data

Objectives, cause and effect, measures, targets, initiatives

Four perspectives, one strategy

Financial

To succeed financially, how should we appear to our owners? Data shows up here as value: revenue enabled, cost removed, risk avoided, capital released. Never as a data objective.

Customer

To achieve our vision, how should we appear to our customers? The customer value proposition (price, quality, availability, service, relationship) sets which customer data matters.

Internal process

To satisfy customers, which processes must we excel at? Operations, customer management, innovation, and regulatory and social processes: most data use cases live here.

Learning and growth

To excel at those processes, what people, information and culture do we need? Information capital sits here with human and organisation capital. This is where the data strategy plugs into the business strategy.

SO WHAT

Data belongs in learning and growth as information capital; its value shows up in the three perspectives above.

Six rules for a strategy map that works

Write objectives as verb and noun

"Reduce unplanned downtime", not "Downtime". An objective is something you do.

Keep it to one page

Fifteen to twenty-five objectives. More than that and nobody can hold the strategy in their head.

Link by cause and effect

Each link is a hypothesis: if we improve this, that will move. Reviews test the hypotheses.

Pair leading and lagging measures

Lagging measures prove results; leading measures tell you early whether you will get them.

Fund initiatives by objective

Initiatives are funded because they move an objective, not because a department asked.

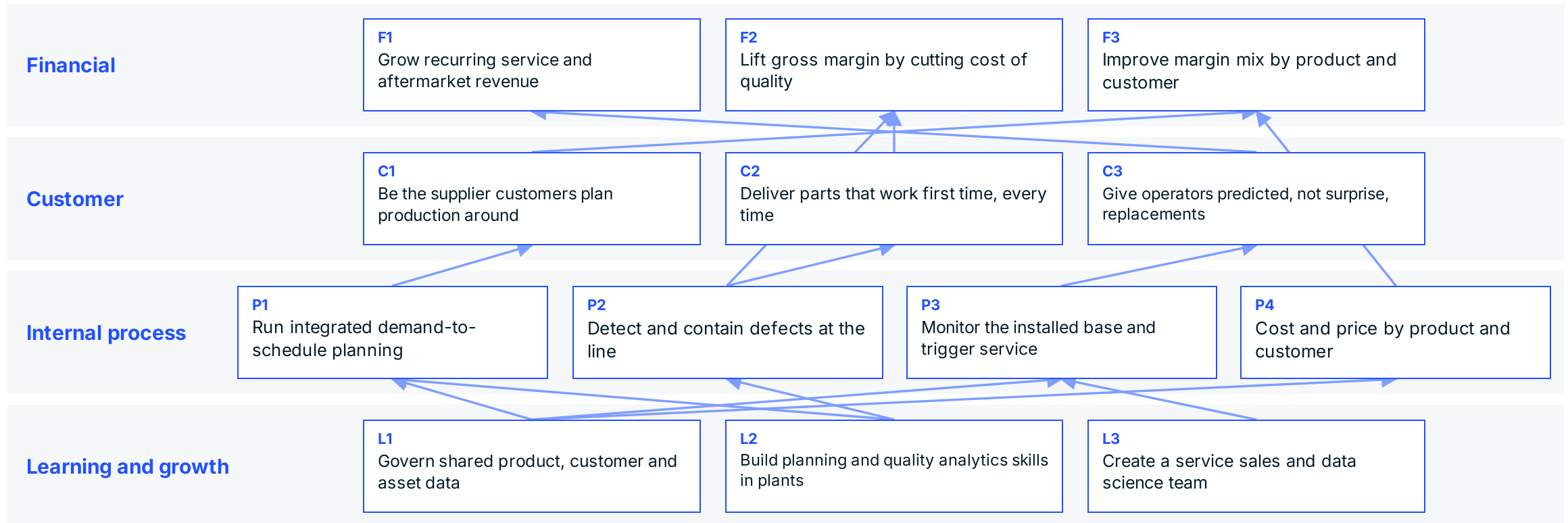
Name an owner for every objective

A person, not a committee, accountable for the measure and the initiatives behind it.

SO WHAT A map that breaks these rules is a list. Fix the map before writing a single data objective.

Strategy map: cause and effect on one page

Illustrative. Arrows run from cause to effect; learning and growth enables process, process serves customers, customers drive the financials.



SO WHAT

Every data objective should attach to a box on this map; the boxes with no data support are deliberate choices.

The data scorecard: four perspectives

The same discipline, applied to the data strategy itself.

Perspective	The question	Leading measures	Lagging measures
Value	How does data move the business results on the strategy map?	Use cases moved from pilot to production; Decisions running on governed data	Benefit realised against baseline; Revenue, cost or risk outcome of each use case
Stakeholder	How do the business users and customers of our data see us?	Time from question to trusted answer; Self-service share of questions	Business partner satisfaction; Adoption of data products by target users
Data operations	Which data processes must we excel at?	Critical data elements with owner and rules; Time to onboard a new source	Quality score of critical data; Data incidents and audit findings
Capability	What people, platform and culture do we need?	Literacy pulse score; Share of new work built on existing data products	Roles filled with the target skills; Run cost per data product

SO WHAT Report the data strategy on the same page as the business scorecard, in the same rhythm.

Define every measure the same way

A measure nobody can reproduce is an opinion.

MEASURE <i>Short name everyone uses</i>	OBJECTIVE SERVED <i>The scorecard objective it measures</i>	WHY IT MATTERS <i>The decision it informs</i>	DEFINITION AND FORMULA <i>Numerator, denominator, inclusions and exclusions</i>
LEAD OR LAG <i>Leading (predicts) or lagging (proves)</i>	SOURCE <i>System of record and data product</i>	OWNER <i>Accountable person, and who reports it</i>	FREQUENCY <i>How often it is refreshed and reviewed</i>
BASELINE <i>Measured value, and when</i>	TARGET <i>Value and date</i>	THRESHOLDS <i>Green, amber, red</i>	CAVEATS <i>Known data limitations</i>

SO WHAT

No measure enters the scorecard without a completed card and a measured baseline.

3

Offence and defence

Choose the balance deliberately

Every data strategy balances offence and defence

Defence: Control, compliance, security and quality: one source of truth for the numbers the organisation is judged on.

- Certified definitions for reported metrics
- Ownership and quality rules on critical data
- Lineage from report to source
- Access control and privacy by design

Offence: Growth, customer value and AI: flexible, fast access to data, with many fit-for-purpose views built from the trusted core.

- Customer and product analytics
- Personalisation and pricing
- Data-enabled products and services
- Experimentation and AI use cases

SO WHAT

Decide the balance explicitly and fund it; otherwise whichever side shouts loudest sets it for you.

Reading your posture

Offence share	Posture	What to do
0-40%	Defence first	Fix the trusted core before scaling analytics: owners, certified metrics, lineage and quality on the data you report. Pick one or two offensive use cases that ride on that core, so the defence work shows value early.
40-60%	Balanced	Run both: a single source of truth for reported numbers and shared master data, and fit-for-purpose views on top of it for growth use cases. Fund the core centrally and the use cases from the business.
60-100%	Offence led	Invest in speed: data products, self-service and AI use cases tied to growth themes. Hold the line on a small, well-governed core, or every new model will start with an argument about the data.

SO WHAT

Revisit the posture every year: it should shift toward offence as the trusted core matures.

4

Portfolio and funding

Value at stake, feasibility and stage gates

Score value at stake and feasibility

Value levers (0-5 each)

- Revenue: how much would this move revenue?
- Cost: how much would this move cost?
- Risk: how much would this move risk?
- Working capital: how much would this move working capital?

Feasibility (1-5 each)

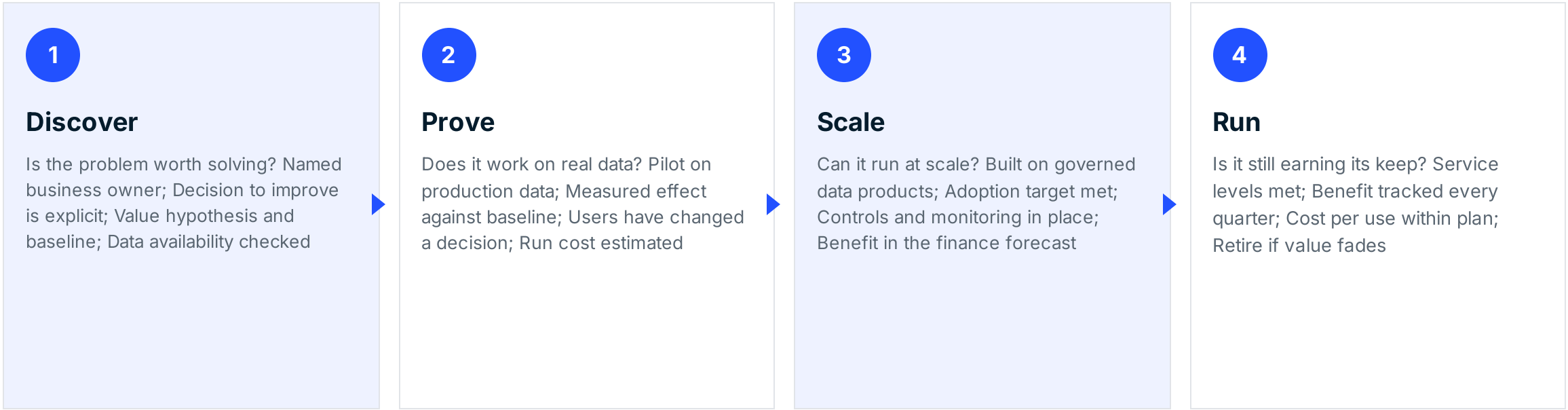
- Data readiness
- Low complexity
- Ease of adoption
- Weight the levers to match your themes
- Rank, then agree the cut line

SO WHAT

Weight the levers to the themes before scoring, so the ranking reflects the strategy, not the loudest sponsor.

Fund through stage gates

Money follows evidence: each gate releases the next tranche.



SO WHAT Release money tranche by tranche on measured evidence; stopping a use case at a gate is a success, not a failure.

5

Governance and rhythm

Who decides, and how the strategy stays alive

Governance forums

Forum	Chair	Cadence	Decides
Executive data council	CEO or COO	Quarterly	Strategy, priorities, funding envelope, posture between offence and defence
Data strategy office	CDO	Monthly	Scorecard review, roadmap changes, stage-gate decisions, escalations
Domain councils	Domain owner (business)	Monthly	Definitions, quality rules, data product backlog, access requests
Design authority	Chief architect	Fortnightly	Architecture standards, build or reuse, technology choices

SO WHAT

Four forums with clear decisions beat a dozen committees; anything not decided here is escalated, not debated.

Decision rights

A accountable, R responsible, C consulted, I informed.

Decision	Exec council	CDO	Domain owner	Steward	Architecture	Risk and privacy
Set data strategy and priorities	A	R	C	I	C	C
Approve the funding envelope	A	R	C	-	I	I
Certify a business metric	I	C	A	R	-	C
Own a data product and its service level	-	C	A	R	C	I
Set architecture standards	I	C	C	-	A	C
Grant access to sensitive data	-	I	A	R	C	C
Retire reports and data sets	-	A	R	R	C	I

SO WHAT One accountable person per decision. If two roles both hold an A, nobody does.

The management rhythm

Cadence	Meeting	Inputs	Decisions
Weekly	Delivery	Sprint progress, blockers, data incidents	Unblock, re-sequence within the quarter
Monthly	Scorecard review	Data scorecard, leading measures, initiative status	Corrective actions on red measures
Quarterly	Strategy review	Scorecard trends, tested assumptions, value realised, new opportunities	Stop, start, re-fund; re-balance offence and defence
Annually	Strategy refresh	Business strategy changes, maturity re-baseline, market shifts	Refresh the cascade, objectives, targets and funding

SO WHAT The quarterly review is where the strategy lives or dies: test assumptions and move money there.

The quarterly strategy review agenda

- Scorecard: which measures moved, which did not, and why
- Hypotheses: which cause-and-effect links held, which need rethinking
- Value: benefits realised against the plan, confirmed with finance
- Portfolio: stage-gate decisions; stop, start or re-fund
- Risks and triggers: anything that forces an early refresh
- Asks: decisions and support needed from the executive team

SO WHAT

Send the scorecard a week ahead and spend the meeting on decisions, not on status.

The first 100 days

Weeks 1-2: Mobilise

- Sponsor and core team named
- Interview schedule set with executives
- Existing strategy documents and scorecards gathered
- Maturity baseline launched

Weeks 3-6: Diagnose and anchor

- Executive and business interviews complete
- Draft cascade: vision to themes
- Decision and capability heat map
- Baseline of value, spend and maturity

Weeks 7-10: Choose and design

- Workshop 1: strategy map and data objectives
- Workshop 2: posture and prioritised portfolio
- Draft data scorecard with measures and owners
- Operating model and forums agreed

Weeks 11-14: Commit and launch

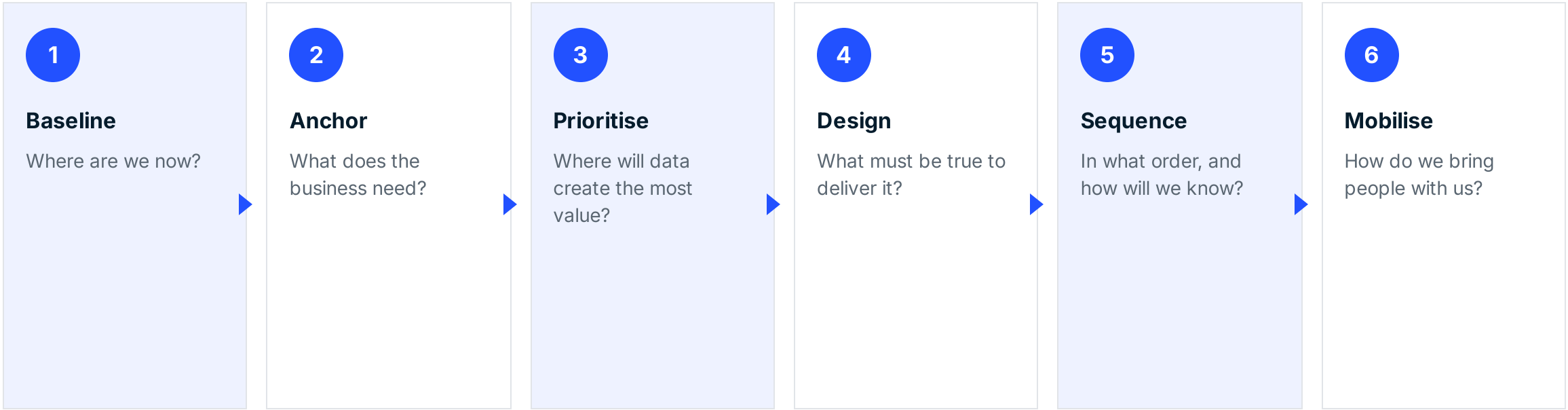
- Roadmap and funding approved by the council
- Strategy on a page published
- First quick wins in delivery
- Monthly and quarterly rhythm started

SO WHAT

Leave day 100 with an approved roadmap, a funded first tranche, live forums and two quick wins in delivery.

How to build it: six stages

The method that produces the cascade, run as a cycle.



so WHAT

The stages are the method; the cascade is the output. Run the stages again every year.

Six reasons data strategies stall

Technology first

The plan opens with a platform choice and works backwards to a reason. Counter-move: Start from business goals and the decisions behind them; choose technology last.

Boil the ocean

Every domain, every system and every quality issue is in scope on day one. Counter-move: Pick the few data domains that carry the most value and finish them.

No business owner

Data teams write the strategy, then try to sell it. Counter-move: Co-author with business leaders; give every objective a business owner.

No line of sight

Initiatives cannot be traced to a business goal or a measure. Counter-move: Link every initiative to a goal, a decision and a KPI before funding it.

Shelfware

A long document that nobody outside the data team has read. Counter-move: Fit the strategy on one page and tell it as a story for each audience.

One and done

The plan is never revisited while the business moves on. Counter-move: Review quarterly, refresh annually, and agree triggers that force an early rethink.

SO WHAT Check your plan against these six before it goes to the executive team.

Use the toolkit

- Strategy Cascade and Scorecard Workbook: Templates from vision and choices to the strategy map, data objectives, posture, scorecard, use case and data product canvases, RACI and the 100-day plan.
- Scorecard Measures Library: Leading and lagging measures for each scorecard perspective, a measure definition card, target-setting rules and a literacy pulse check.
- Worked Example: Manufacturer: An industrial components maker: vision to strategy map, a balanced posture, scorecard, use cases, data products and the first 100 days.
- Worked Example: Retail Bank: A regional bank leading with defence after supervisory findings, with an offensive growth theme on primary relationships.
- Worked Example: Retailer: A specialty retailer leading with offence: personal relevance, smart pricing and one stock pool, on a governed consent core.
- Worked Example: Hospital Group: A hospital and clinic group leading with defence after a privacy incident and a coding audit, with a patient-flow growth theme.
- Worked Example: Telecom Operator: A challenger mobile and broadband operator leading with offence on churn, network investment and business growth, on governed consent.
- Assess your readiness at scikiq.org/data-strategy#assess

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