

BSB 7.0

BSBTEC601

**REVIEW
ORGANISATIONAL
DIGITAL
STRATEGY**

BSBTEC601

Review organisational digital strategy

Release 1

Learner Guide

Aspire Version 1.1



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Before you begin

This Learner Guide is based on the unit of competency *BSBTEC601 Review organisational digital strategy*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at:

www.training.gov.au.

How to work through this Learner Guide

This Learner Guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the Learner Guide you need to read, and which Practice Tasks and Learning Checkpoints you need to complete. The features of this Learner Guide are detailed in the following table.

Feature of the Learner Guide	How you can use each feature
Learning content	Read each topic in this Learner Guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples	These highlight key learning points and provide realistic examples of workplace situations.
Practice Tasks	Practice Tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Summaries	Key learning points are provided at the end of each topic.
Learning Checkpoints	There is a Learning Checkpoint at the end of each topic. Your trainer will tell you which Learning Checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> Identifies, interprets, analyses or reviews complex texts from various sources to determine, organisational operations, specific requirements and responsibilities Checks documents for accuracy of content, grammar, spelling and punctuation
Writing	<ul style="list-style-type: none"> Collates and compiles results of research and analysis using appropriate technical language and organisational formats Develops materials to convey information, requirements or recommendations using language and structure appropriate to the audience Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose
Self-management	<ul style="list-style-type: none"> Responsible for following policies, procedures and legislative requirements
Planning and organising	<ul style="list-style-type: none"> Plans, develops, implements and monitors processes for reviewing digital strategy performance
Technology	<ul style="list-style-type: none"> Uses digital technologies and systems safely, legally and ethically to access, store and share information

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1: Develop the plan for the review of the digital strategy	1A Analyse organisational information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Develop review methodology	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Prepare and gain approval of the review plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Collect review information	2A Source relevant information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Organise, interpret and discuss information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Organise interpreted information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Analyse the collected information	3A Analyse information according to the review plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4: Determine review findings and outcomes	4A Develop and discuss preliminary findings	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4B Source additional information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4C Prepare recommendations	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 5: Document and distribute outcomes and recommendations of review	5A Draft and distribute the review report	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	5B Update the draft report based on feedback	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	5C Proofread final report	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	5D Gain approval and distribute final report	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1 | Develop the plan for the review of the digital strategy

- 1A Analyse organisational information
- 1B Develop review methodology
- 1C Prepare and gain approval of the review plan

1A Analyse organisational information

It is important to obtain and interpret information on an organisation's policies, procedures and objectives.

The importance of a review plan

Creating a review plan will maximise the effectiveness of the review itself.

Conducting an effective digital strategy review that leads to meaningful analysis and insights requires careful planning. The process of creating a review plan should enable you to clarify a number of details including the:

- objectives of the review
- scope of the review
- stakeholders to be involved in the review process
- review methodology to be used
- information that will be required to conduct the review
- criteria that will be applied when conducting the review
- time requirements for the review.

Every organisation is different, so the review plan should reflect the requirements and context of the specific business.

The role of policies, procedures and objectives (PPO) information

An organisation's digital strategy should be aligned to the organisation's PPO information. Analysing these documents should be one of the first steps in creating the review plan.

An organisational digital strategy has less to do with technology and more to do with achieving the organisation's objectives (and supporting its policies and procedures) using digital tools, systems and infrastructure.

While the process of reviewing a digital strategy involves gathering and analysing a wide range of information, the first step is to look at the organisation's existing policies, procedures and objectives (PPO) information.

The following table provides an overview of each type of PPO information

Objectives	Objectives are specific and measurable goals that an organisation aims to achieve. They may relate to revenue, operations, productivity, customer satisfaction, growth and more. Effective objectives generally follow the SMART acronym (specific, measurable, attainable, relevant, timely).
Policies	Policies are written guidelines designed to support the achievement of objectives.
Procedures	Procedures outline the specific sequence of steps that should be followed in order to achieve a consistent end result.

When reviewing PPO information, you should check for alignment between each objective and any supporting policies and procedures.

Obtaining PPO information

An organisation's suite of PPO information may add up to hundreds or even thousands of pages of information. This means it is important to focus on the PPO information that has the greatest relevance to the organisation's digital strategy – in other words, not every piece of PPO information will be relevant to your review.

The location of PPO information will depend on the size and nature of the organisation you're working for. Larger organisations may have a dedicated content management system for storing and maintaining PPO documents. In smaller organisations, PPO information may be housed in a shared drive.

When obtaining PPO information, you should always check:

- Are you looking at the latest version of the document? Refer to the versioning information.
- Do you have permission to access the document? Check with your manager if you're unsure about whether you are allowed to access certain sensitive documents.

Policy and legislative requirements

When accessing PPO information, it is critical to understand what laws govern your industry and use of technology. The most common policy found in Australian organisations is the Australian Privacy Policy (APP) which is a privacy framework in the *Privacy Act 1988* (Cth).

There are thirteen principles that can be found at: aspirelr.link/oaic-privacy-principles

Questions to ask when reviewing PPO information

Accessing an organisation's PPO information will help provide a broad view of the organisation's objectives and operations, and should get you starting to think about questions such as:

- What are the current priorities and objectives of the business? Are these being met?
- How is technology currently being used to achieve objectives and support policies and procedures?
- Are there opportunities to enhance existing technologies to better achieve objectives or support policies and procedures? If so, how?
- Are there opportunities to implement new technologies to better achieve objectives or support policies and procedures? If so, how?

The answers to questions like these will help inform the scope of your review. For example, if one of the organisation's current objectives is acquiring new customers, the review can focus on whether customer-acquisition KPIs are being met, and what technology is being used to acquire customers. You can also look at policies and procedures relating to customer acquisition and consider whether there are opportunities for these to be enhanced by digital technology.

Example

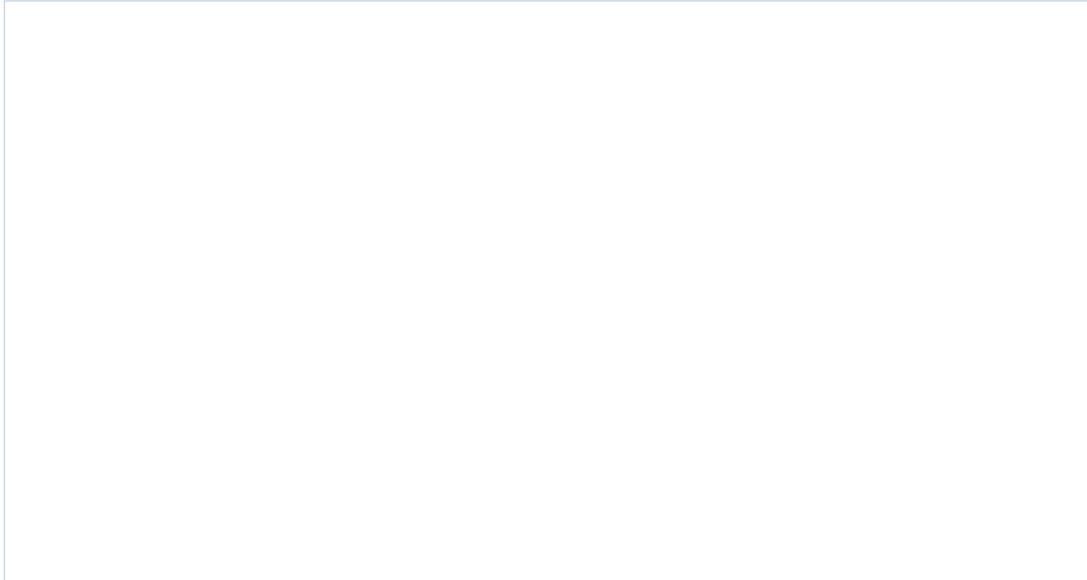
Analysing organisational information

Doug is a business analyst at ZigZag Men's Attire, a medium-size menswear brand that recently launched an online store and social media marketing campaign. Doug has been asked to conduct a review of the company's digital strategy that was drafted two years ago. Doug reviews ZigZag's PPO information, and identifies that the company's current objectives include achieving an increase of 20 per cent in income by the end of the financial year. However, Doug also notes that none of the policies or procedures include any mention of the online store or other current digital initiatives being undertaken by the company to achieve this goal.

Practice Task 1

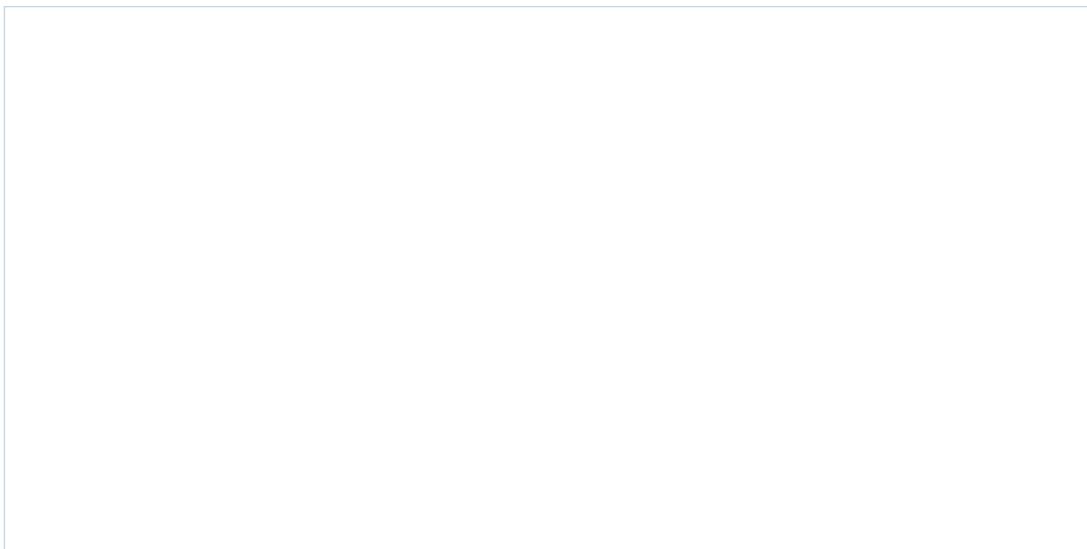
Question 1

Why would you analyse an organisation's PPO information at the start of a project to review a digital strategy?



Question 2

You have been looking in your organisation's content management system for PPO information and have identified a document named Draft Policy for Monitoring of Employee Social Media Use. What are two questions you would ask yourself before downloading the file?



1B Develop review methodology

Identifying and applying an appropriate review methodology will enable the review process to be conducted strategically.

A review methodology specifies the way in which you will gather and analyse information and data during the review process. While the basic methodology used will typically involve a process of gathering and analysing data to identify findings and recommendations, there are several variables in each of these steps as follows.

Types of data to be gathered	<p>Data to be used during a review could be:</p> <ul style="list-style-type: none"> ▪ Qualitative ▪ Quantitative ▪ Primary (data gathered by you the reviewer) ▪ Secondary (existing data) ▪ Data internal to the organisation (e.g. sales data) ▪ Data external to the organisation (e.g. Australian benchmarks)
Method of data collection	<p>This will depend on the types of data you are gathering but may include:</p> <ul style="list-style-type: none"> ▪ Desktop audit (document review) ▪ One-on-one interviews ▪ Focus groups ▪ Surveys and questionnaires ▪ Case studies ▪ Observational trials

You will probably use a combination of data types and methods of collection during your review. Questions to ask yourself when determining which methodology to use include:

- What are the goals and scope of the review?
 - If you believe the questions to be answered through the review can be answered using existing internal data, you may not need to use other research methods.
- How quickly does the review need to be completed?
 - Generally speaking, secondary data (i.e. it already exists) is more readily obtained than primary data. Depending on your deadlines, you may not have the capacity to obtain primary data.
- Does existing (secondary) data actually exist?
 - Secondary data (if valid) can make your job much easier, but it's not always readily available. If, for example, you wanted to look at data from 20 years ago for comparative reasons, you may find that this is not available to you.

- Will you be able to conduct a valid analysis?
 - The question here is whether your proposed methodology will enable you to gather sufficient valid data to conduct an analysis that leads to meaningful results. For example, data created through an interview with one customer may not be as compelling as data created through interviews with 60 customers.
- Do you have a budget for your review?
 - Some methodologies (for example, conducting focus groups) have costs attached. You need to confirm whether the methodology you have in mind will be financially feasible before you go ahead.

Example

Developing review methodology

Doug is a business analyst at ZigZag Men's Attire, a medium-size menswear brand that recently launched an online store and social media marketing campaign. Doug has been asked to conduct a review of the company's digital strategy that was drafted two years ago. One of the company's current objectives is achieving an increase of 20 per cent in income by the end of the financial year. Doug considers a variety of methodologies but decides the review will primarily be conducted by analysing quantitative data generated from the company's well-established internal reporting databases.

Practice Task 2

Question 1

'Conducting a digital strategy review requires you to create new data'. Do you agree with this statement? Write 2–3 sentences to justify your response.

Question 2

You have the job of reviewing your company's digital strategy. What are three questions you will ask to determine which review methodology to use?

1C Prepare and gain approval of the review plan

The review plan formally documents how you will conduct your review of a digital strategy. The plan must be approved before you commence your review.

Features of review plans

Some organisations have their own review plan template, but you may need to create your own.

The following table summarises the types of information that should be included in the review plan with brief examples of each.

Type of information	Brief example
Objectives of review	Ensure the digital strategy will enable the achievement of organisational objectives relating to customer acquisition, staff retention and costs of production for the next 12 months.
Scope of review	<p>The scope of this review is limited only to reviewing the alignment of the digital strategy to objectives in the following three areas:</p> <ul style="list-style-type: none"> Customer acquisition Staff retention Costs of production. <p>While it is recognised that digital strategy relates to a lot more than these three areas, these are the areas of prime concern in this review.</p>
Stakeholders to be involved	<p>The following stakeholders will be involved in discussions and consultation relating to the review:</p> <ul style="list-style-type: none"> Harry Price: Head of Customer Engagement Sue Harris: Head of Human Resources Graham Ng: Head of Production. <p>The review is to be overseen and signed off by:</p> <ul style="list-style-type: none"> Louise Tran: Chief Operations Officer.
Review methodology to be used / information to be collected	<p>The review is to be conducted by:</p> <ul style="list-style-type: none"> Accessing customer acquisition data from the CRM for the 12 -month period to now Conducting one-on-one interviews with a random selection of staff members using an interview template Accessing production cost data for the last 12 months from the finance database Accessing planned revenue streams contained in the current operational plan. <p>The collected data will be subject to qualitative and quantitative analysis to identify three main findings and corresponding recommendations to the digital strategy.</p>

Type of information	Brief example
Criteria to be applied	<p>The main criteria to be applied during this review are:</p> <ul style="list-style-type: none"> ▪ Is the current digital strategy being actively implemented? ▪ Is the current digital strategy fit for purpose?
Review timelines	<p>This review is subject to the following timelines:</p> <ul style="list-style-type: none"> ▪ Sign-off on review plan: 30 May 2021 ▪ Gather required data: 14 June 2021 ▪ Assess data and develop findings: 28 June 2021 ▪ Develop recommendations: 5 July 2021 ▪ Develop draft report: 19 July 2021 ▪ Distribute final report: 24 July 2021

The review plan will set the tone for the entire review activity, so it's important to spend time on this to make sure you have anticipated for possible issues.

Gain approval of review plan

When you are ready for approval from the stakeholder/s who have responsibility for sign-off, it is important to organise a face-to-face meeting. This will help to avoid confusion and miscommunication and provide stakeholders with the opportunity to ask questions regarding the review process.

Here are some suggested steps to gain stakeholder sign-off on the review plan:

1. Set a date to present your review plan.
2. Make sure that all stakeholders are able to attend, either in person or via video conferencing/phone.
3. Make sure the stakeholders present have authority to approve your plan.
4. Present plan (using visual aids such as a presentation, if appropriate).
5. Clarify any issues raised by stakeholders.
6. Ask for signatures.

Be prepared for the possibility that stakeholders may not be willing to sign off on the spot. In this case, seek an agreed date for sign-off to be provided.

Example

Preparing and gaining approval of review plan

Doug is a business analyst at ZigZag Men's Attire, a medium-size menswear brand that recently launched an online store and social media marketing campaign. Doug has been asked to conduct a review of the company's digital strategy that was drafted two years ago. He prepares a review plan that outlines the methodology he has identified, as well as details such as the scope of the review, criteria to be applied and review timelines.

Doug organises a meeting with the organisation's Chief Technology Officer, who has sign-off authority for the project. The CTO listens intently to Doug's presentation and asks a few questions about how Doug plans to access some types of data. Doug has prepared clear responses to these questions. The CTO is happy with what has been presented and signs off on the review plan.

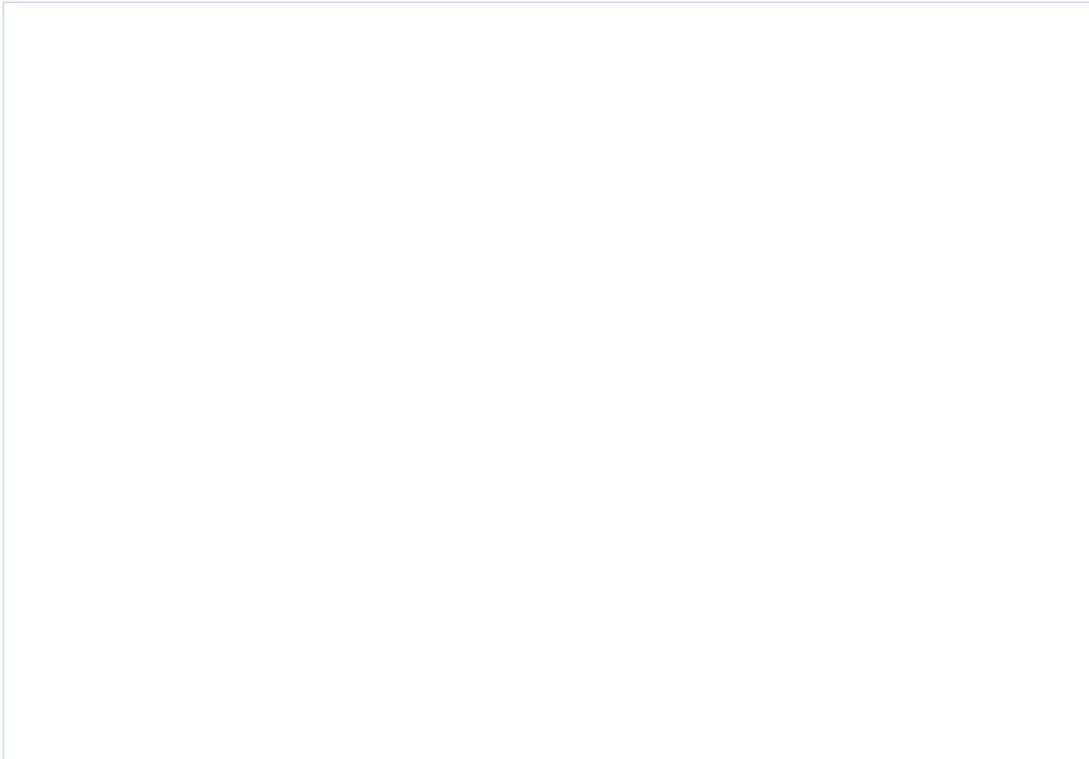
Practice Task 3

Question 1

You are required to prepare a review plan before commencing on a project to review your organisation's digital strategy. What types of information will you include in the review plan?

Question 2

One of your colleagues has created a review plan and is planning to email it to his manager for sign-off. Why would you suggest that your colleague considers conducting a sign-off meeting instead? Explain your response.



Summary

- Before reviewing an organisation's digital strategy, a review plan must be prepared.
- Reviewing organisational policies, procedures and objectives (PPO) information provides an insight into the current aims of the organisation and how these relate to the use of digital technologies.
- When obtaining PPO, it is important to confirm you are looking at the current version of the document, and that you have permission to access/view it.
- The methodology you use to conduct the review will typically include the main steps of gathering and analysing data, which informs the development of findings and recommendations.
- Variations to the review methodology primarily relate to the types of data you plan to collect and the way in which you will collect them.
- Your choice of methodology will be informed by factors such as the scope, timelines and budget for the review, as well as the availability and appropriateness of different types of data.
- The way you plan to conduct the review process is documented in a review plan.
- Details included in a review plan typically include the objectives, scope and timelines of the review, stakeholders to be involved, methodology to be used and criteria to be applied.
- The review plan needs to be signed off before you start the review process.
- Organising a face-to-face approval/sign-off meeting may help gain sign-off more efficiently than via an email request.

Learning Checkpoint 1

Develop the plan for the review of the digital strategy

Part A

1. In your own words, describe the relationship between objectives, policies and procedures. Write 3–4 sentences.

2. What is the typical methodology followed when conducting a review of a digital strategy, and what are the two main areas where variations to this methodology are likely to occur? Write 2–3 sentences.

Part B

Read the case study, then answer the questions that follow.

Case study

Cynthia is a Digital Strategist at KidWorld, a medium-size toy retailer. KidWorld is primarily a brick-and-mortar retailer, but they launched an online store two years ago. At the time of launching the online store a digital strategy was also developed, but this has not been reviewed since. Cynthia has been given the task of conducting a review of the organisation's digital strategy. She is aware from the current business strategy, that one of KidWorld's main current objectives is to increase revenue from its online store by 15 per cent within the next 12 months.

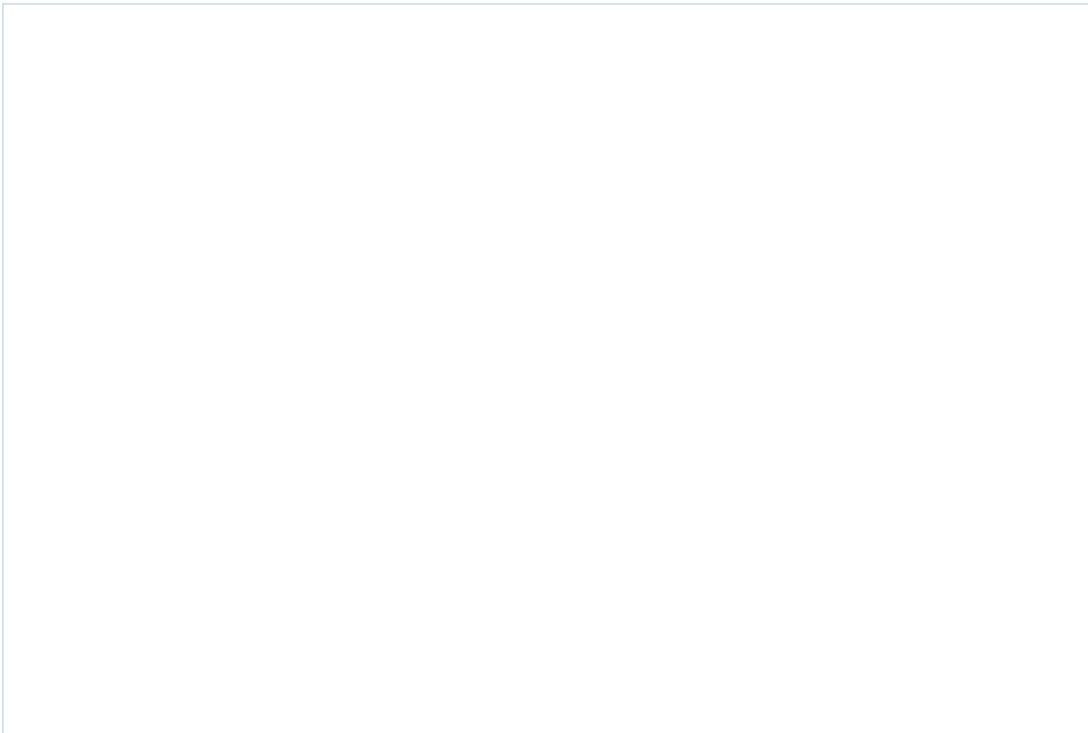
1. Cynthia's first step in the review process is to review KidWorld's policies, procedures and objectives. What are three questions she should be asking herself while she conducts this review?

2. Assume the focus of the review is KidWorld's current objective to increase revenue from its online store by 15 per cent within the next 12 months. Describe the types of data Cynthia is likely to specify in her review plan, and appropriate ways to gather this data. Explain your choices. Write 2–3 sentences.

3. What are two examples of criteria that Cynthia might specify will be applied in the review plan?



4. Cynthia has completed work on her review plan. What six steps should she follow to get the plan approved as smoothly as possible?





Topic 2 | Collect review information

- 2A Source relevant information
- 2B Organise, interpret and discuss information
- 2C Organise interpreted information

2A Source relevant information

The quantity and quality of information you source will have a direct impact on the quality of your digital strategy review.

In the previous topics, we looked at developing a review plan – the questions to be answered through the review and how the review will be conducted. You now need to gather the data and information required to conduct an effective analysis. This includes identifying findings and corresponding recommendations. The types of data you need and the way in which you will obtain it should have been identified in your review plan.

Sources of data

There are many potential sources of data, and the sources you choose will depend on the objectives and scope of your review.

However, it may be helpful to consider data sources in terms of internal vs external, and quantitative vs qualitative. Gathering data from a range of different sources will help confirm the validity of the data you collect.

Internal quantitative data	External quantitative data
<ul style="list-style-type: none"> ▪ Raw data generated from internal systems and databases (e.g. finance system, HR system, etc.) ▪ Data contained in internal reports such as monthly earnings statements 	<ul style="list-style-type: none"> ▪ Publicly available reports on best-practices in your industry ▪ Competitor data contained in publicly available annual reports, etc.
Internal qualitative data	External qualitative data
<ul style="list-style-type: none"> ▪ Interviews conducted with company employees ▪ Feedback provided by staff during annual staff surveys 	<ul style="list-style-type: none"> ▪ Customer feedback delivered via non-company means (e.g. on Facebook, Google Reviews)

Checking data quality

As you gather data, you must check that it meets five requirements before it can be used in your analysis.

Accuracy

└ For example, are the monthly sales figures you've been provided correct in every way?

Completeness

└ For example, has the data for each and every month been provided for the last financial year?

Reliability

└ For example, do the monthly sales data you received from the sales team contradict the data you received from the finance team?

Relevance

└ For example, do monthly sales data relate to the scope of the review you are conducting, which is focused on increasing the digital literacy of staff across the organisation?

Timeliness

Is the sales data you received up-to-date and does it relate to the current reporting period?

Missing information

In some situations, you may not be able to obtain the data you specified in your review plan. This could be because, for example, the organisation does not keep track of the relevant information or does not have the technology in place to provide the data in the format you need. In this instance, you should note which data was not available and why. If possible, consider alternative forms of data that may be used instead.

Example

Sourcing relevant digital strategy information

Claudia is a digital strategist at BlueBottle Organic Foods. She is reviewing a digital strategy, with a focus on whether the strategy supports the company's objective of being Australia's number one online retailer of organic goods. Claudia gathers information from a variety of sources:

- Feedback received from one-on-one interviews conducted with BlueBottle customers as part of a recent focus group exercise
- Online sales figures for the past two years generated from the company's finance database
- Data regarding customer conversion rates on the BlueBottle online store, generated from the website team's reporting dashboard
- Revenue data for BlueBottle's three main business rivals, obtained from their publicly available annual reports.

Claudia checks each piece of data she receives to ensure it is accurate, complete, reliable, relevant and timely.

Practice Task 4

Question 1

You are gathering data in order to review your company's digital strategy. The focus of the review is to determine whether the company's social media marketing strategy is leading to increased sales.

What are three sources of data you might refer to?

Question 2

You are gathering data in order to review your company's digital strategy. The focus of the review is to determine whether the company's social media marketing strategy is leading to increased sales. Included in the data provided to you by the sales team is a 2014 report discussing the effectiveness of directly contacting customers via SMS.

Do you consider this to be quality data? Why or why not?

2B Organise, interpret and discuss information

As you start to gather information, you need to ensure it aligns with your review plan. If you encounter issues interpreting the information you have received, discussion with experienced stakeholders is required.

Dealing with incoming information

As you begin receiving information, you should be organising it in a logical order to make the process of analysis easier.

By now, you have started gathering some of the data relevant to your digital strategy review. It can be tempting to abandon the review plan at this stage. However, it is important to continue revisiting the review plan to ensure that you are:

- gathering the data you specified in the review plan
- gathering it using the method that was approved
- adhering to the review timelines.

It is important to be organised in this work to avoid being overwhelmed by a vast array of data. This will be covered in more detail in the next topic.

As you check each piece of incoming information, you may notice some trends in the data. This is good because you can make a note of any early inferences and check them later when you do a comprehensive analysis of the complete data set. In particular, keep in mind at all times the review criteria you specified in your review plan.

Identifying and discussing information issues

In addition to noticing any early trends as information comes through, you also need to be on the lookout for potential issues. These will mainly fall into the following categories.

Outdated information	<ul style="list-style-type: none"> • You may be provided with information that is out-of-date and no longer relevant. This may be because you've been provided with an old version of a document, or simply that the most recent version of the document is itself out-of-date.
Complex information	<ul style="list-style-type: none"> • You may receive data and information in a format that is not easily understood. Reports generated from organisational systems, such as finance databases, are not always intended to be easily read and interpreted by a casual reviewer.
Conflicting information	<ul style="list-style-type: none"> • You may identify information that conflicts with other information you have received, or that conflicts with your understanding of a given affair. For example, if you recently heard that company profits were 15% up, but then received a data extract seeming to show profits being 15% down.

Issues such as these are likely to cause problems during the analysis stage, so they need to be raised with relevant stakeholders as quickly as possible.

In order to maximise effective discussion, it may help to prepare using the following framework.

Situation

Provide a clear explanation of the work you are doing and how it relates to the stakeholder.

Example: 'I'm currently reviewing the organisation's digital strategy, and this involves looking at a range of data, some of it relating to your business area.'

Problem

Explain the issue you have identified as simply as possible. Avoid using an accusatory tone.

Example: 'Your team recently sent through the online sales figures for the past 12 months. Thanks very much. I just wanted to double-check whether I'm missing something – these figures seem to be quite a bit higher than the equivalent figures I received in the monthly finance report.'

Implications

The consequences and long-term effects of the problem not being addressed.

Example: 'I need to ensure I'm working with the correct data in order to check whether our current digital strategy is enabling the company to reach its objective of a 10% increase in online sales by September.'

Requirements

What is required to solve the problem?

Example: 'Can you please double-check the figures at your end and get back to me by the end of the week?'

Example

Organising, interpreting and discussing information

Claudia is a digital strategist at BlueBottle Organic Foods. She is reviewing a digital strategy, with a focus on looking at whether the strategy supports the company's objective of being Australia's number one online retailer of organic goods. Claudia receives information from a variety of sources including:

- Online sales figures for the past two years generated from the company's finance database
- Data regarding customer conversion rates on the BlueBottle online store, generated from the website team's reporting dashboard.

As she receives each piece of information (in Excel spreadsheets), Claudia names and organises the files for easier analysis later on. She's started noticing a couple of trends (such as conversion rates falling abruptly after 13 March).

She also notices that sales for a given month (January 2020) seem to be inconsistent with the rest of the data she has received. She organises a meeting with the head of the accounting team to discuss the situation. The head agrees that something does seem amiss with the information and sends Claudia an updated version of the data later that day.

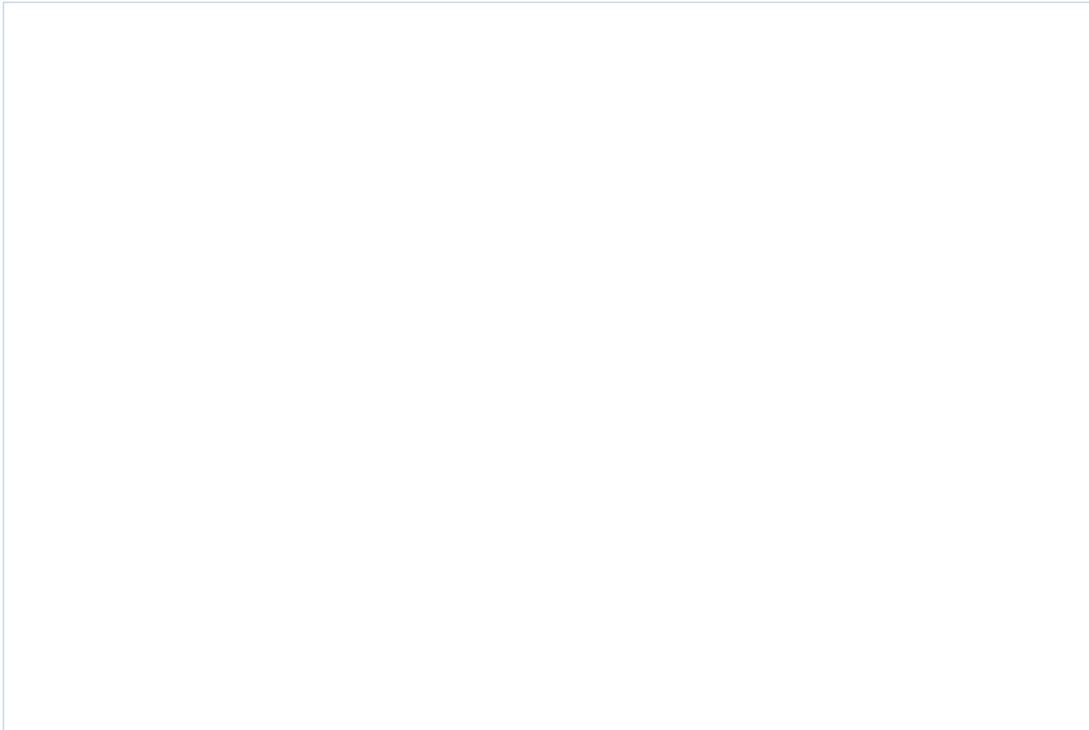
Practice Task 5

Question 1

You have started gathering information for a digital strategy review. What three actions will you perform on each piece of data as it comes through?

Question 2

You have identified that a piece of information you received (a social media policy) seems to be out-of-date (it mentions MySpace but not Instagram or WhatsApp). You organise a meeting with the policy officer. How will you structure the meeting?



2C Organise interpreted information

Taking the time to organise your data will increase the quality and efficiency of your analysis.

The information you have gathered and interpreted now needs to be organised in a format that supports effective analysis. The input and clarification from stakeholders need to be incorporated in an organised way. Depending on the scope of your review, you may have gathered a lot of data, so doing this organisation activity will help you later when it comes to conducting the analysis. You don't need to wait until you have finished gathering data before you start organising it – organising the data as you receive it will make the job easier and less time-consuming.

There are many ways to organise your data, and the way you do this well depend in some part on the nature of the data you've collected and the scope of your review. However, a few ideas for organising data are as follows:

Ways of organising data:

- Grouping according to whether the data is relevant to the scope of the review
- Grouping according to quantitative or qualitative data
- Grouping according to business area to which the data relates
- Grouping according to data received from internal systems (e.g. company customer relationship management database) or external systems (e.g. publicly posted customer reviews)
- Grouping data according to whether it relates to an objective, policy or procedure
- Arranging data sequentially (e.g. arranging sales figures sequentially by month)

You should use suitably descriptive naming conventions for the files and folders that contain your organised data. For example:

- 2020 sales data organised by product category
- 2019 social media usage organised by month
- Feedback from stakeholders 20-7-2020

At this stage, you are not seeking findings or recommendations from your data. You're putting the data into a format that will make the analysis process as easy as possible.

Example

Organising interpreted information

Claudia is a digital strategist at BlueBottle Organic Foods. She is reviewing a digital strategy, with a focus on looking at whether the strategy supports the company's objective of being Australia's number one online retailer of organic goods. Claudia has gathered a wide range of data and information. This includes:

- Qualitative feedback received from one-on-one interviews conducted with BlueBottle customers
- Online sales figures for the past two years and projected sales for the upcoming 12-month period – this data is sorted by product category
- Data regarding customer conversion rates on the BlueBottle online store
- Data regarding the company's monthly spend on search engine optimisation
- Annual reports containing income reports for BlueBottle's three main business rivals
- Data regarding BlueBottle staff sick leave entitlements.

Claudia first identifies that the data regarding sick leave entitlements is not relevant to the scope of the review and removes it from the dataset. She then takes the quantitative sales data and reorganises it into sequential order to facilitate easier analysis.

Practice Task 6

Question 1

You are conducting a review of a digital strategy and have started to receive a wide variety of different information from different stakeholders.

What are two strategies you will use to keep the data organised?

Summary

- Data should be gathered according to the specifications of the review plan.
- Data sources can be categorised according to whether they are qualitative, quantitative, internal or external. A variety of sources may be appropriate depending on the data required.
- As information is received it should be checked for accuracy, completeness, reliability, relevance and timeliness.
- Incoming information should be organised and any early trends may be noted.
- Common issues with incoming information include it being outdated, complex or conflicting with other data you have seen.
- Issues with data can be addressed by meeting with relevant stakeholder/s and applying a framework comprising four stages: situation, problem, implications, requirements.
- Organising incoming data will make the process of analysis more efficient and effective.
- Data can be organised in many ways – this may include grouping it according to whether it is qualitative or quantitative data, grouping according to business area, grouping according to relevant business objectives, etc.
- Using suitably descriptive naming conventions for information files and folders will help keep everything organised and ready for analysis.

Learning Checkpoint 2

Collect review information

Part A

1. You are conducting a review of a digital strategy. The review plan specifies that you require financial data about the cost of maintaining your company's hosting infrastructure over the past 12 months, as well as qualitative data regarding staff feedback on how their daily work is helped or hindered by technology. What are three appropriate data sources you would refer to?

2. What are five questions you would ask yourself when reviewing any incoming data to confirm whether it should be considered?

Part B

Read the case study and then answer the questions that follow.

Case study

Aadhira is a Business Analyst at PlasmaSoft, a start-up biotech firm. Aadhira is conducting a review of PlasmaSoft's digital strategy, which was created in the early days of the company. One of the firm's current objectives is to increase its sales by 10 per cent in the US market within the next two years. Aadhira requests a copy of the company's US sales, to date. She receives a complex sales history spreadsheet from the head of the sales team, Gustav. Aadhira has a number of concerns regarding this data, including:

- Sales figures for some US states seem to be missing from the spreadsheet
- Headings are missing in the spreadsheet so that some of the data is unclear
- The data relating to total sales in \$AUD appears to be based on the USD/AUD exchange rate on the day the report was generated, not on the date when each relevant transaction entered PlasmaSoft's Australian bank account. Aadhira is aware the exchange rate has fluctuated considerably in recent times.

1. How should Aadhira present her concerns to Gustav? Explain your response.

2. Aadhira has received an updated version of the sales report from Gustav. This is in addition to other data she gathered including:
- Interviews with PlasmaSoft's main US distributors
 - Publicly available annual reports for PlasmaSoft's main competitors in the US market
 - Operational plans on how to complete the sales process for a new customer using PlasmaSoft's newly implemented CRM
 - Complaints data from US PlasmaSoft customers, received via the company's website
 - AUD/USD exchange rate forecasts for the next 12 months.

What are three ways in which Aadhira could organise this data in preparation for conducting an analysis?



Topic 3 | Analyse the collected information

3A Analyse information according to the review plan

3A Analyse information according to the review plan

By analysing data, you will uncover key issues and findings relating to the digital strategy.

At this stage, you have gathered data and information from a variety of sources and organised it in preparation for analysis. But what does analysis involve? Ultimately, it entails processing the information in one or more ways to reveal trends relating to the questions you asked in your review plan.

Analysing quantitative data

Quantitative data is information that can be expressed as a numerical value.

Quantitative data you may have collected during your review may include information such as:

- Number of unique visitors to the company website each day
- Amount of time spent each day by employees on Facebook
- Maximum and minimum server speeds each day.

The following best practices for analysing quantitative data identified by Jonathan Koomey are a good starting point:

Quantitative data analysis best practices

- Before starting the analysis, double-check your raw data for any anomalies; for example, did you record all figures correctly from your data source?
- Double-check any calculations that are used in your analysis. If you're conducting calculations automatically in a spreadsheet, double-check that the formula you're using is correct.
- Cross-reference total figures (e.g. sales for the year) to ensure they match up with relevant sub-totals (e.g. the total of monthly sales figures for that year).
- Normalise data in order to make analysis easier; for example, comparing the average server speeds in a business to current Australian averages.
- When an issue is identified (e.g. the data indicates a drop-off in visits to your company's online store), break the problem into parts to identify why this has occurred.

Stephen Few has identified eight ways to arrange quantitative data. The method/s you use will depend on the data you're working with and the question you are trying to answer. Using an appropriate method of arranging the data will enable trends or issues to be identified.

Time-series	This method analyses a single variable over a period of time. For example, number of unique visitors to the company website each day for a period of 12 months.
Ranking	Groups of data are ranked in either ascending or descending order. For example, the top-selling products in an online store in a given month may be ranked by product category (e.g. homewares, clothing, stationery, etc.)
Part-to-whole	A group of data is compared to the whole; that is, out of a total of 100%. For example, homeware products accounted for 12% of all products sold on the online store in August.
Deviation	Actual data is compared against a set of reference data. For example, actual monthly sales via the online store are compared against the projected monthly sales estimated at the start of the year.
Frequency distribution	Shows the number of times a particular variable was observed during a period. For example, in August there were 15 days when there were 0–100 customers on the online store, 7 days with 101–200 customers, 6 days with 201–300 customers and 3 days with 301–400 customers.
Correlation	Involves the comparison of two sets of data to identify if they move in the same direction. For example, comparing data about daily spend on search engine optimisation (SEO) compared with data about daily visitors to the website shows that SEO spending correlates positively with website traffic.
Nominal comparison	Involves comparing groups of data in no particular order. For example, comparing the monthly sales of products via the online store according to product code.
Geographic or geospatial	Compares data using a map or similar layout. For example, a world map showing that 80% of online sales traffic comes from within Australia, 12% comes from China, 4% comes from Japan and the remaining 4% from other countries.

Analysing qualitative data

The nature of qualitative data can make it more challenging to analyse objectively.

You may have gathered both quantitative and qualitative data for analysis. The following table outlines some techniques to use when working with qualitative data.

Develop and apply codes	<ul style="list-style-type: none"> ▪ Codes enable you to categorise your qualitative data, so it can be analysed more effectively. An example of this would be to score qualitative feedback from a customer survey (e.g. 'I can't believe you'd treat a customer this way) with a quantitative value (e.g. '1' indicating 'unsatisfied customer'). ▪ Doing this can involve unintentional subjectivity – asking a colleague to conduct the same process (without seeing your results) will help avoid bias. ▪ You may also apply codes according to terms or words found in qualitative data sets (e.g. to categorise any qualitative feedback containing the term 'disappoint').
Identify themes, patterns and relationships	<ul style="list-style-type: none"> ▪ Once you have applied codes to your qualitative data, you can analyse it in several ways, including: <ul style="list-style-type: none"> – Examining how the coded data changes over time (e.g. to see if customer satisfaction expressed via client surveys increases over a 12-month period) – Comparing trends in the qualitative data against trends in the relevant quantitative data (e.g. comparing qualitative customer satisfaction data against recurring sales data) – Searching for missing information (e.g. if no customers mention the company's recently launched mobile app in their survey responses, what is the reason for this?)

The three main potential issues when analysing data are as follows:

Cognitive bias	<ul style="list-style-type: none"> ▪ Even if you're working only with quantitative data, your analysis may be affected by your personal biases regarding the issues at hand. ▪ For example, if the data indicated that website sales have gone down since updates recommended by your team were implemented, you may try to look for another reason to explain the data. ▪ You must be aware of your own personal biases when starting the analysis process. Involving colleagues in this process can help to identify and contain biases.
Leaping to opinions	<ul style="list-style-type: none"> ▪ It can be tempting to leap to a particular opinion or finding on the bases of preliminary data. ▪ However, you must double-check any potential findings to ensure they are supported by the data from multiple points of analysis.
Errors	<ul style="list-style-type: none"> ▪ When conducting data analysis, you may be working with a lot of different information and figures. ▪ The risk of making an error is high, and any errors will throw off the accuracy of your analysis. ▪ The techniques provided above for double-checking your figures will limit this occurring, but you must always be alert to potential issues.

Example

Analysing information

Joaquin is a data analyst at GreenGrubs Garden Supplies. He has gathered and organised a wide range of qualitative and quantitative data aligned to the scope of the review plan. The main datasets Joaquin is working with include:

- Daily Google search rankings for GreenGrubs for the past 12 months
- Monthly SEO spend for the past 12 months
- Daily online sales revenue for the past 12 months
- Customer responses to a short questionnaire (containing open-input questions) that is given to customers during the checkout process, asking them how easy they found the purchasing experience.

Joaquin conducts several checks on the data. This includes ensuring that the total online sales revenue figure he has for the past 12 months is the same as the total for the individual daily figures for the same period. He uses several techniques to analyse the quantitative data, including using a time-series chart to show how online sales have increased over the period. He also compares the sales data with the SEO data to identify whether the two are positively correlated.

Joaquin also codifies the qualitative customer feedback information and identifies several trends, including that customers who mentioned the term 'mobile' in their feedback were more likely to have expressed frustration during the checkout process.

Joaquin asks a colleague to double-check his work to identify whether any bias is evident.

Practice Task 7

Question 1

You have gathered a wide range of quantitative data for analysis. What are three ways to ensure that you conduct the analysis process accurately?

Question 2

Some of the information you're analysing includes qualitative interview feedback you conducted with stakeholders involved in the website development team. What steps will you take when analysing this data?

Summary

- Data analysis involves processing the information you have gathered using a variety of techniques to reveal trends relating to the questions raised in the review plan.
- Analysis is conducted on both quantitative and qualitative data.
- Best practices when analysing quantitative data include double-checking the raw data, double-checking calculations, cross-referencing figures and breaking identified issues into smaller parts.
- There are numerous ways to arrange quantitative data – using an appropriate method will enable trends and issues to be identified more effectively.
- The nature of qualitative data can make it more difficult to analyse objectively. Codifying qualitative data and then identifying themes, patterns and relationships is a method for overcoming subjectivity.
- The three main potential issues when conducting data analysis are cognitive bias, leaping to opinions and errors. These issues can all be overcome if proactively managed.

Learning Checkpoint 3

Analyse the collected information

Part A

1. Identify situations in which you would use each of the following quantitative data arrangement techniques. Identify one situation per technique.
 - Correlation
 - Deviation
 - Part-to-whole

Part B

Read the case study and then answer the questions that follow.

Case study

Somchai is a Business Analyst at Nuts'n'Bolts, an energy drink manufacturer. Somchai is reviewing the company's digital strategy. As part of the data collection process, Somchai received transcripts of focus groups conducted with current customers about their experiences ordering via the company's website. A sample of the feedback provided by customers includes:

- *It worked fine for me on desktop but not on mobile*
- *I found the process pretty frustrating to be honest*
- *Is it meant to work on my mobile phone?*
- *I didn't like how many steps I had to go through*
- *It's annoying that it doesn't provide any idea about shipping costs until the very end of the process*
- *It wouldn't work for me on my iPhone*
- *It took me a long time to make a simple order*

1. How should Somchai analyse this data? Explain your response.



Topic 4 | Determine review findings and outcomes

- 4A Develop and discuss preliminary findings
- 4B Source additional information
- 4C Prepare recommendations

4A Develop and discuss preliminary findings

Preliminary findings will reveal themselves through your analysis of information. These findings must be discussed with relevant stakeholders.

Developing findings

Your 'findings' are essentially the summary of the analysis you conducted, i.e. the key trends you identified through the course of analysis.

Findings are different from recommendations: findings capture the current state whereas recommendations provide actions to address any negative findings. We'll be looking at recommendations later, so you just need to focus on findings for now.

Findings can be developed based on either quantitative or qualitative data (or a combination of both), but they must derive from the analysis you conducted. In other words, you can't include ideas that you can't back up with data in your findings.

You don't necessarily need to include all the details of your analysis within your finding, but you should reference how you interpreted the data to arrive at your finding. Examples of how to support findings with data are provided in the following table.

Finding	Supporting data
The current search engine optimisation strategy has not increased the number of customers visiting our online store.	Since starting the SEO campaign with Google AdWords 12 months ago, daily traffic to the online store has not increased. See daily website traffic data for the past two years at Appendix A.
Changes to the online customer portal have increased client satisfaction.	Since the updated customer portal was launched on 2 August 2019, customer reviews of their experience have increased from an average of 3.2 to 4.1. This is supported by a number of positive open-input reviews left by customers on Google Reviews – these are provided at Appendix B.
Allowing staff to work from home has led to increased workplace productivity.	Since the Working from Home policy was updated four months ago, worker output has increased by 10% each month. Detailed data is provided at Appendix A.

Depending on the scope of your review, you may identify a number of findings. In this case, it may be appropriate to sort these findings. Examples of how you might sort your findings include:

Sorting method	Examples
Business area	Sorting findings into those related to: <ul style="list-style-type: none"> Logistics HR Finance
Technology type	Sorting findings into those related to: <ul style="list-style-type: none"> mobile devices cloud computing desktop devices
Business layer	Sorting findings into those related to: <ul style="list-style-type: none"> business strategy business operations
Importance	Sorting findings into those that: <ul style="list-style-type: none"> must be acted upon immediately are less important

Discussing findings with stakeholders

When you have developed your preliminary findings, it is important to discuss these with relevant stakeholders.

These stakeholders should be content experts who will be able to ‘sanity check’ your findings. Taking a structured approach for the discussion will help maximise its effectiveness. The following steps are recommended.

Tips for discussing findings:

- Prepare the information you will present and discuss. Document any questions you wish to ask the stakeholder group.
- Discuss your preliminary findings with the stakeholders.
- When presenting your findings, some stakeholders may not like what they are hearing – this is why it’s really important to be able to back up what you’re presenting with objective data.
- Listen and respond. Use two-way communication to gather quality feedback from stakeholders.
- Measure and adjust. Take careful notes of what needs to be changed or adjusted, or where further data is required.
- Remember that the focus at this point is on the findings only. You will work on identifying recommendations based on your findings at a later point. Discussion of recommendations should not take up a large chunk of the conversation.

Example

Developing and discussing findings

Esther is a digital strategist at H2O Skin Care. She has completed an analysis of a wide array of qualitative and quantitative data. The analysis indicates three main findings:

- Staff want more opportunities for BYOD (bring your own device)
- The slow speed of the current cloud storage infrastructure is causing inefficiency in work
- The company's recently launched app has not experienced wide take-up.

Esther ensures each of her findings is supported by data. For example, her first finding is based on qualitative data received through the annual staff survey, while her second finding is based on both the daily average server speed report and the daily work output report.

Esther organises a meeting with Julio, the head of information technology. Julio takes issue with the finding about the speed of the cloud storage infrastructure. However, when Esther shows him the underlying data, Julio nods and agrees that this is an issue.

Practice Task 8

Question 1

What are three types of information you might expect to support the following finding?

- Recent changes to the company website have led to an increase in customer traffic and satisfaction.

Question 2

You are presenting the preliminary findings of your review to a group of stakeholders. One of the stakeholders gets excited about potential actions to rectify one of the negative findings you identified. How will you respond? Explain your answer.

4B Source additional information

Additional information may be required to support your findings and inform your recommendations.

The process of presenting your preliminary findings to stakeholders may result in some stakeholders finding one or more of your findings:

- ambiguous
- requiring more information
- requiring clarification.

In any of these situations, you will either need to gather and analyse more data/information, conduct further analysis on existing information and/or revisit your findings.

In some instances, it may not be immediately clear to you why a stakeholder thinks further information or clarification is needed. In these situations, the 'Five Why' methodology can be used to get a better understanding of the stakeholder's request and how to meet their needs.

Generally speaking, the sources of additional information will likely be similar to those examined in 4A. If you believe you have exhausted the data sources you used previously, you may need to use previously unexplored data sources.

Example

Sourcing additional information

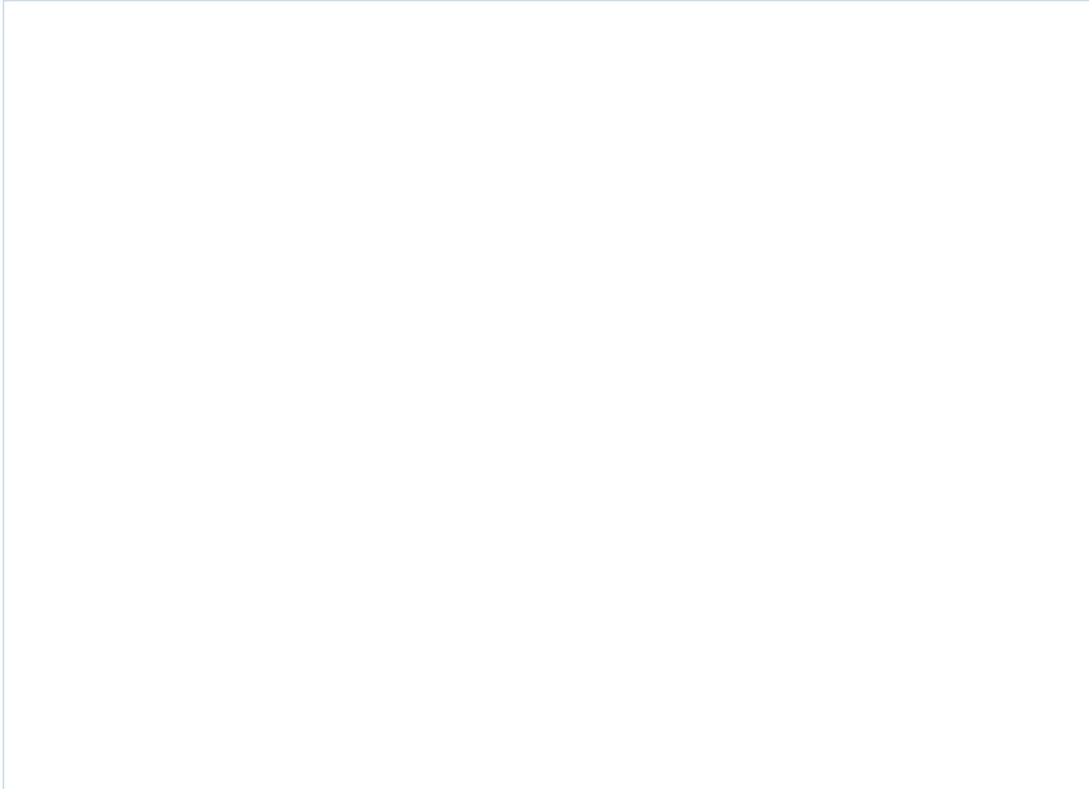
Esther is a digital strategist at H2O Skin Care. She has completed an analysis of a wide array of qualitative and quantitative data. One of the main findings of her analysis is that the company's recently launched app has not experienced wide take-up. One of the stakeholders she presents this finding to identifies that while Esther has obtained download data for the app relating to the Apple App Store and Google Play Store, she has not obtained data for other stores including the Samsung Galaxy Apps Store or Huawei App Store.

The stakeholder recommends Esther obtain this missing data and check whether it changes her finding. Esther goes back to the mobile team and requests the additional data sets – in this instance, the data does not change her finding.

Practice Task 9

Question 1

Give two reasons why you may need to source additional information after presenting your preliminary findings.



4C Prepare recommendations

Recommendations should be designed to address any negative findings from your analysis.

At least some of your findings are likely to indicate areas where the organisation's digital strategy (or its execution) can be improved. This is where the importance of recommendations comes in. For each of your findings, you should identify at least one recommendation. Brainstorming multiple recommendations for each of your findings will enable you to make a more informed decision about which course of action to put forward in your review report.

The following table contains some tips for writing effective recommendations:

Be sharp and succinct	Recommendations should be made in one sentence that starts with a verb.
Be SMART	Recommendations should be Specific, Measurable, Attainable, Realistic, and Timely (SMART).
Be feasible	This is similar to the Attainable and Realistic components of the SMART acronym but is worth repeating. There's little point putting forward a recommendation that has no real chance of succeeding (e.g. due to cost, technical ability or other reasons).
Consider timing	This is similar to the Timing component in the SMART acronym. Think about how your recommendation can be timed for maximum impact.
Consider impact	Recommendations rarely occur in isolation in an organisation. One course of action can have massive negative/unintended consequences to other projects or pieces of work. Also consider how a potential recommendation might be able to leverage other organisational initiatives.

If you have organised your findings into different groups, your recommendations may follow a similar format. You may also wish to re-sort your recommendations; for example, by urgency or cost.

The following table identifies some common types of recommendations relating to digital strategies.

Common types of recommendations
<ul style="list-style-type: none"> ▪ Updating the digital strategy to meet current organisational objectives ▪ Updating the digital strategy to reflect the current digital environment ▪ Procuring new systems or technologies ▪ Rolling out/implementing existing underused technologies

Example

Preparing recommendations

Esther is a digital strategist at H2O Skin Care. She has completed an analysis of a wide array of qualitative and quantitative data. The analysis indicates three main findings:

- Staff want more opportunities for BYOD (bring your own device).
- The slow speed of the current cloud storage infrastructure is causing inefficiency in work.
- The company's recently launched app has not experienced wide take-up.

For each finding, Esther develops a recommendation as follows:

- Develop a BYOD policy enabling staff to use their own devices at work within the next three months.
- Commence actions to procure a current-generation cloud storage system by end of financial year.
- Increase marketing spend on app by 20 per cent over the next 12 months.

Practice Task 10

Question 1

You have conducted a data analysis and developed a list of findings. What are four steps you will take when developing a list of recommendations?

Question 2

One of your colleagues is developing a list of recommendations for a digital strategy. The first recommendation on their list is:

- We need to invest more in search engine optimisation.

Is this a good example of a recommendation? Discuss.

Summary

- Your analysis of information should inform the development of findings.
- Each finding you identify must be supported by compelling data.
- Findings may be organised by, for example: business area, technology type, level of importance, etc.
- Findings should be discussed with stakeholders before developing recommendations.
- Stakeholder discussion may indicate that further information needs to be obtained to support your findings.
- Recommendations should align to the findings you identified.
- Each recommendation should be SMART as well as succinct and devised with consideration of other business activities that may be affected by the recommendation.
- Common recommendations may relate to updates required for the digital strategy, or the procurement/roll-out of digital technologies.

Learning Checkpoint 4

Determine review findings and outcomes

Part A

1. What are two common types of recommendations that might be made as part of a digital strategy review?

Part B

Read the case study and then answer the questions that follow.

Case study

Tony is a digital strategist at Circle Logic, an app development company. Tony is involved in a review of the company's digital strategy and has gathered and analysed a variety of information. This includes the following data regarding the devices used to access the Circle Logic website over the past six months.

	January	February	March	April	May	June
Desktop devices (%)	85%	87%	83%	84%	85%	84%
Mobile devices (%)	15%	13%	17%	16%	15%	16%

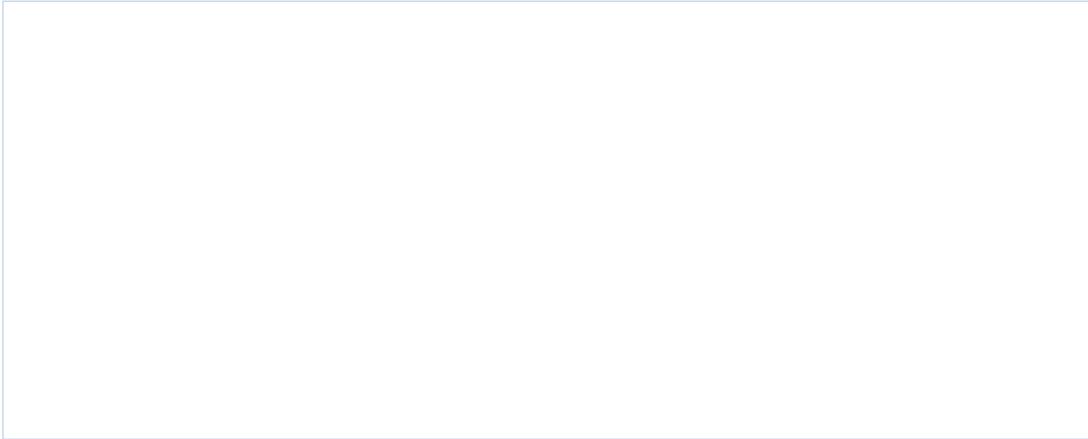
The current digital strategy has an emphasis on pushing the organisation's mobile delivery due to increasing use of mobile devices by customers and decreasing development spend on website optimisation for desktop devices.

1. What finding can be identified from this data?

2. Tony is planning to present the findings of his analysis to Stacey, who is head of the website development team. What are three ways Tony can make this presentation run as smoothly as possible?

3. Tony presents the findings of his analysis to Stacey. As head of the website development team, she asks, 'How can you be sure that if we invest more in our mobile site, it won't lead to more customers visiting us via mobile?'
What are two pieces of data Tony could identify to help respond to Stacey's query?

4. Tony has gathered additional information that confirms his finding from Q1. Based on this finding, what are two potential recommendations Tony may identify?





Topic 5 | Document and distribute outcomes and recommendations of review

- 5A Draft and distribute the review report
- 5B Update the draft report based on feedback
- 5C Proofread final report
- 5D Gain approval and distribute final report

5A Draft and distribute the review report

The review report should provide stakeholders with a clear understanding of how the organisation's digital strategy is currently performing.

The report should also point out what further actions are required to make the digital strategy excel.

Once you have completed your analysis of the review information and developed recommendations, it is time to collate this information into a report that is appropriate for interested stakeholders.

Report format

While the findings and recommendations of each review report will be unique, they all follow a similar structure.

At this point in the process, you should have most (if not all) of the information required. Now you need to compile it into a user-friendly report.

Before drafting your report, find out if your organisation uses a report template. This will save you time because the template will comply with organisational style guide requirements. Using a template also means your report will be in a format that is already familiar to your stakeholders.

If your organisation does not have a review template, check if a style guide exists. This will provide guidance on fonts, formats and spacing, for example. It usually includes rules on the use of the organisation's brand and corporate identity.

Whether you are using an organisational report template or developing the report from scratch, the main items to be included will generally include the following.

Review report

- Executive summary
- Introduction (including rationale for conducting the review)
- Methodology used
- Findings
- Recommendations
- Appendices (these may include the raw data/information analysed)

In most situations, you will draft the report in a Word editing format that can be converted to a Portable Document Format (PDF) version. Converting the document to PDF prior to distribution ensures:

- content in the document cannot be changed
- the formatting you applied will not be lost or changed when viewed on another computer.

Using version control

It is a good idea to include version control information when drafting your report because you will probably update it when you receive feedback from stakeholders.

Depending on your organisation's document versioning and sharing policies, version information can be tracked in two ways:

1. Manually edit version information within the document

Version information provided as a simple table at the front of the review documents is often enough. The important information to include here is:

- who changed the document (author)
- when they changed it
- what changes were made.

A document version control table may look like the following.

Version	Date	Author/s	Rationale
0.1	1-Apr-20	Joe Bloggs	First Draft
0.2	12-Apr-20	Joe Bloggs	Reviewed by stakeholders

2. Automatically manage version information using collaborative tools

Collaborative tools include Dropbox, Google Drive and Microsoft One Drive. Usually, these tools automatically track versioning information every time a document is changed. Also, they usually enable you to access previously saved versions of the document when required.

Distributing the report

Distributing the draft review report is not always as simple as clicking the Send button.

Keep in mind that your report may include sensitive information about people or trade secrets. It may contain information that should not be sent in an unprotected email. You also need to consider the organisational policies in place for distribution of reports and any privacy requirements of the recipients of the report.

You may need to check the organisation's policies before considering email/online distribution.

Privacy Policy	States the level of privacy required in the documents, such as the naming of staff members.
Email Usage Policy	May determine the level of encryption required depending on the document's sensitivity level or whether a password is required.
Transmission of Sensitive Data Policy	States what is considered sensitive, the personnel to share with, the distribution methods, if encryption and passwords are required.
Password Management Policy	Determines what level of password protection is required for sensitive documents (e.g. not a simple password like 'password123' or some variation).
Digital Copyright Policy	Identifies the requirement for copyright materials that may be included in your report.
Social Media and Web Usage Policy	States what types of information should not be shared online.
Encryption Policy	Specifies what types of information must be encrypted and rules for encryption (e.g. usage of password protection).

Email tips

If it is appropriate to distribute the review report via email, there are some tips for doing this.

Use an appropriate subject line	Ensure the subject line of the email is relevant. For example, Digital Strategy Review (Draft). Avoid using all capitals in the subject line because this comes across as shouting.
Use font tools	Use the tools in your email software to bold text, such as headings, and use dot points for lists. This will increase the clarity. Avoid underlining text because this may confuse a reader into thinking it is a hyperlink.

Check hyperlinks	If you decide to redirect someone to external information using a hyperlink, double-check the hyperlink to make sure it directs the reader to the desired website address.
Include a call to action	As the purpose of this email is to gather feedback on your report from stakeholders, clearly specify: <ul style="list-style-type: none"> ▪ what type of feedback you need ▪ when you need it by.
Be polite	Saying 'thank you' and being polite helps gain cooperation from stakeholders. Avoid using social media abbreviations and emoticons because the audience may consider them to be immature.
Check attachment size	Some organisations have strict limits on the file size of attachments that can be sent and received via email. If your report exceeds this limit, you may need to upload it using an alternative method (e.g. to cloud storage service).

Example

Drafting and distributing the review report

Jackson is a business analyst at Clear Clientele Inc. He has completed a review of the organisation's digital strategy and documented both his findings and recommended changes to the digital strategy (which was last updated two years ago). Clear Clientele Inc. does not have a pre-existing reporting template, so Jackson develops his review using the following main headings: Executive Summary, Introduction, Methodology, Findings and Recommendations. Jackson also includes an Appendix containing anonymised data used to inform his findings and recommendations. He formats the report according to the requirements of his organisation's style guide.

Jackson converts the report to PDF and prepares an email for distribution to the stakeholders specified in the review plan. He double-checks the email prior to sending, to ensure all language is clear and appropriate for the audience (mainly comprising senior management staff). Jackson requests stakeholders to provide any feedback via return email by the following Wednesday.

Practice Task 11

Question 1

What are the main items you would include in a table of contents for a digital strategy review report?

Question 2

One of your colleagues (Tony) has prepared a digital strategy review report and is about to send it out to a group of senior managers for review. He asks you to check the following draft email:

SUBJECT: *Pls Read*

Hey team,

Please see the report attached – let me know if any problemos.

Tx,

Tony

What are four changes you would suggest to Tony?

5B Update the draft report based on feedback

After receiving stakeholder feedback, you usually need to make changes to your review report.

It is rare for stakeholders to have nothing to say about a review, so be prepared to receive at least some feedback. Depending on the number of stakeholders involved in the review (and their level of interest), you may receive a lot of feedback.

Generally speaking, if you have time, you should wait until the deadline for receiving feedback before you start making too many changes to your document. This is because you may receive conflicting feedback from different stakeholders.

When reviewing stakeholder feedback, ask the following questions.

Is the feedback relevant to the scope of the review?	<ul style="list-style-type: none"> Remember that stakeholders reviewing your report have sometimes not been involved in the review planning process. This means they may provide feedback or requests that do not fall in the scope of the review.
Does the feedback support or conflict with existing information in the report?	<ul style="list-style-type: none"> Stakeholders may send feedback or information that strengthens or endorses your findings and recommendations. However, stakeholders may disagree with your findings/ recommendations or provide information that refutes your findings and recommendations.
Does the feedback require further clarification from the stakeholder?	<ul style="list-style-type: none"> Stakeholder feedback may not always be clear. It may relate to operational processes that you are unfamiliar with. In these cases, you may need to go back to the stakeholder to seek further information about what is being requested.
Should the report be adjusted based on the feedback?	<ul style="list-style-type: none"> Depending on your answers to the above questions, you may need to update your report to reflect the information and feedback received from stakeholders.
What needs to be communicated back to the stakeholder?	<ul style="list-style-type: none"> It is good practice to thank stakeholders for taking the time to review your work and provide input, and to say that you have incorporated their feedback. If you are not incorporating feedback (e.g. if it falls outside of the scope of the review), it's best to let the stakeholder know this, and the reason why. This will avoid them asking for the same changes when the final version of the report is distributed.

If you receive strongly conflicting feedback from multiple stakeholders, it may be appropriate to convene a meeting with the relevant parties to discuss and confirm the changes to be made. This is preferable to going back and forth via email with multiple stakeholders.

Once you have gone through the process of identifying which feedback to accept, the process of updating your review report document should be straightforward. Just remember the following tips:

- Ensure that if you make a change in one part of the document, any other relevant parts of the document are updated for consistency. For example, if a stakeholder corrected a customer engagement figure you used in a summary table, you need to make sure that any other reference to this figure is also updated.
- Depending on your organisation's practices, you may either need to track any changes to the document (for example, so that changes based on feedback are clearly visible) or simply make and accept all changes to the document.
- Don't forget to follow the version control processes discussed in section 5A when you've finished updating the document.

Example

Updating draft report based on feedback

Jackson is a business analyst at Clear Clientele Inc. He has drafted and distributed a review of the organisation's digital strategy to senior management staff. Of the 10 stakeholders to whom the report was distributed:

- four provide no feedback
- three reply via email to say they think the report looks good
- one (head of IT) provides feedback that one of Jackson's suggestions regarding an upgrade to hosting infrastructure isn't feasible due to the organisation's current network setup
- one (head of HR) asks why there is no mention of the new online HR hub in the review – the scope of the review was only to look at customer-facing parts of the business
- one (head of Sales) notices that one of the figures used in the report is incorrect and provides the correct figure to Jackson.

Jackson updates the report based on the feedback from the heads of IT and Sales and thanks them for their input. He lets the head of HR know about the scope of the review and thanks her for the feedback.

Practice Task 12

Question 1

What are three questions you would ask if you received strongly conflicting feedback on your draft review from multiple stakeholders?

Question 2

You sent out a draft review of a digital strategy for stakeholder feedback. One of the stakeholders sends the report back with a comment that you used an outdated sales report in your analysis. What are three actions you will take to update the report?

5C Proofread final report

Proofreading is a critical step in creating a professional document.

Proofreading your work may seem like an unnecessary and time-consuming process. However, it adds a layer of professionalism to your work and is therefore very important.

Here are some tips for proofreading your report before you send out the final version.

<p>Use an automatic spelling and grammar check</p>	<ul style="list-style-type: none"> • Every word processor has an inbuilt spelling and grammar checker. You should run this on your document before distribution. • Ensure the language of your spelling checker is set to English (Australian). • Remember that although automatic checks are great, they do miss things and you must always double-check your work manually. • Common errors that aren't always identified by automatic checkers are provided below this table.
<p>Print your work before proofreading</p>	<ul style="list-style-type: none"> • Many people find it easier to identify errors on the printed page rather than on a computer screen. • Being mindful of the environment, this should be done only after digital proofing tools have been used.
<p>Read your report out loud</p>	<ul style="list-style-type: none"> • While it may seem silly, this is a great way to identify and address any unnatural language and grammar.
<p>Check the first word of every sentence</p>	<ul style="list-style-type: none"> • Using the same first word over and over can be exhausting for a reader. • Go through your report to identify any repetition and look for alternate wording where appropriate.
<p>Use appropriate tone and terminology</p>	<ul style="list-style-type: none"> • Consider the stakeholders who will be reading the report and ensure the tone and terminology is appropriate for them. • While your report is on a digital strategy, the stakeholder audience may not be digitally literate. Avoid technical jargon and keep the tone clear and professional.
<p>Ask a colleague or mentor to double-check</p>	<ul style="list-style-type: none"> • A second pair of eyes is always recommended to pick up errors you may have missed.

Spelling and misuse of words

The following table highlights some commonly misspelled words that are frequently not picked up in automatic spelling and grammar checkers.

Word	Correct usage
Its	The dog likes its new treats.
It's	It's interesting that the cat likes the dog's treats, too.
There	There is a funny smell with the dog.
Their	Their dog smells funny.
They're	They're thinking about selling the smelly dog.
Were	We were going to the park with friends.
We're	We're going to the park.
Where	Where is the park?

Example

Proofreading final document

Jackson is a business analyst at Clear Clientele Inc. He has updated the review report of the organisation's business strategy based on the feedback he received from stakeholders. He now uses several proofreading techniques on the final report. This includes using an automatic spelling and grammar checker and reading the report aloud to pick up any strange language. He asks his colleague Pearl to double-check his work. She identifies just one mistake – Jackson has used the word 'there' instead of 'their'. Jackson fixes the document based on this feedback.

Practice Task 13

Question 1

You're proofreading a review report prior to sending it out as a final version. What are four checks you will conduct?

Question 2

One of your colleagues asks you to double-check the following passage from a report he is preparing:

- Based on the data reviewed, its clear that changes need to be made to the digital strategy. Based on last years earning slump, the strategy is not enabling the business to meet it's objectives. They're is great opportunity for our online services to be rolled out to other market's and sectors in the coming financial year.

How would you update this passage? Provide the re-written passage in full including your changes.

5D Gain approval and distribute final report

Sign-off and distribution are the final key steps in the review process.

Gaining sign-off

Before you distribute the final version of the report, it needs to be signed off by the relevant key stakeholder/s. These may have been specified in your original review plan. Here are some tips to make the sign-off process as smooth and efficient as possible:

- If the stakeholder/s responsible for sign-off have not been involved in the document review process, organise a walkthrough session to discuss the key findings and recommendations of your report.
- Be prepared to make any final changes based on feedback received from the stakeholders responsible for sign-off. If this is the case, ensure you have a clear understanding of what the stakeholder/s are looking for in order to provide their sign-off.
- Be clear about when sign-off is required. Your report may be part of a wider project, so delays on sign-off may hold up other parts of the broader business.
- Provide a simple format for sign-off. This may be as simple as a final page in your report document that you present to stakeholders to sign in person.

Distribute final report to stakeholders

Now that your final report is signed off, it should be distributed to project stakeholders according to the processes outlined in the review plan. This may be via email, in which case the tips for emailing reports outlined in section 5A should be followed. However, the following table outlines other actions you may take when distributing the report to stakeholders.

Distribution actions

- Hold a face-to-face meeting with individual stakeholders or in groups
- Conduct a distribution meeting via web-conferencing software
- Distribute report via internal platform (e.g. content management system)
- Share report via collaborative tools

Regardless of the distribution method used, you may continue to receive feedback from interested stakeholders. While this feedback should be documented according to organisational procedures, you should advise stakeholders that the report is final, and any feedback will be considered for future reviews.

Example

Gaining sign-off and distributing final report

Jackson is a business analyst at Clear Clientele Inc. He has created the final version of his review report, which includes a final page for sign-off by the company's COO. He organises a meeting with the COO to outline the main findings and recommendations of the report. The COO takes time to look through the report carefully and provides sign-off, commending the quality of the work done. Jackson then distributes the signed-off version of the report to the stakeholders specified in the review plan via email. The report is also made available through the company's reporting hub.

Practice Task 14

Question 1

You have finished working on the final version of your review document and need to get sign-off from the manager of Technical Services. What are three steps you will take when preparing for sign-off?

Question 2

How do you know which method/s to use when distributing a signed-off review report to interested stakeholders?

Summary

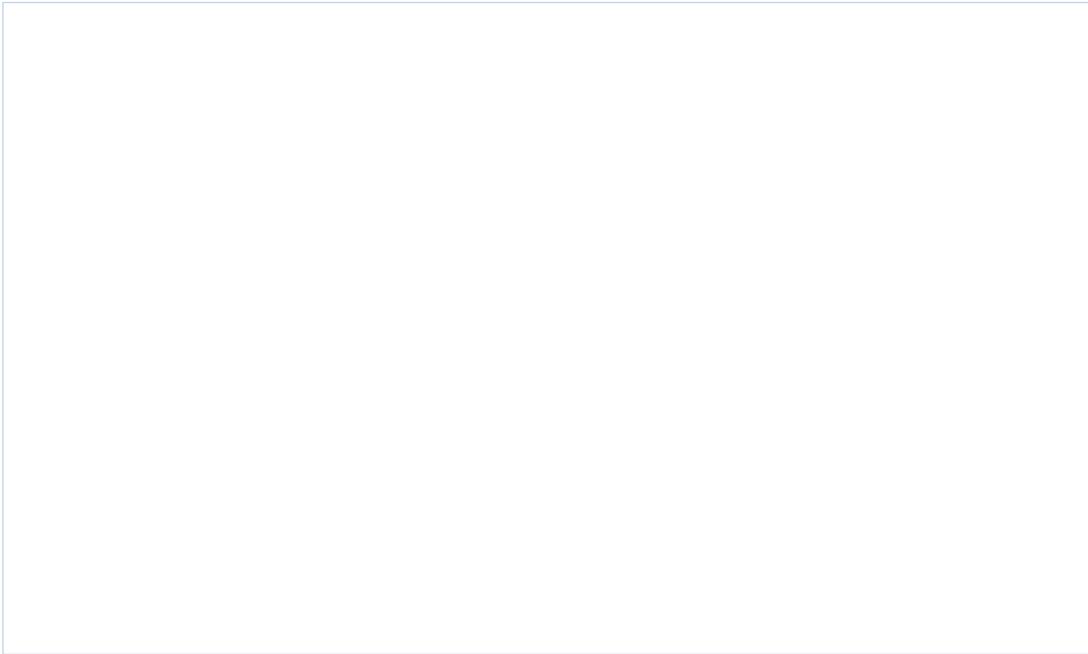
- A review report should provide stakeholders with a clear understanding of how the organisation's digital strategy is currently performing.
- The report should point out what further actions are required to make the digital strategy excel.
- If available, use existing organisational templates and style guides when developing the review report.
- A review report should include the headings: Executive Summary, Introduction, Methodology, Findings, Recommendations and Appendices.
- Distribution of the draft review report should be subject to organisational policies and procedures and, if using email, should follow appropriate etiquette and formatting.
- Feedback received from stakeholders should be carefully considered before changes are made to the report. Any changes should be subject to proper version control.
- The final version of the report must be subject to a variety of proofreading techniques.
- The final report must be signed off by key stakeholder/s prior to submission. Organising a walkthrough session, being clear about when sign-off is required and providing a simple sign-off format are all effective strategies for expediting this process.
- The final report should be distributed according to the process specified in the review plan.

Learning Checkpoint 5

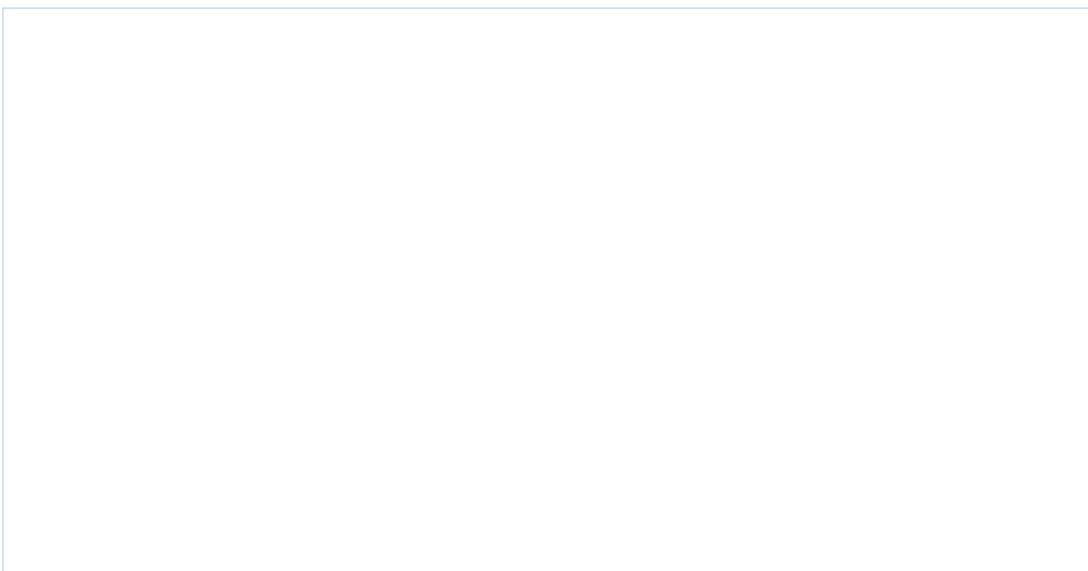
Document and distribute outcomes and recommendations of review

Part A

1. In addition to email, what are three methods for distributing a digital strategy review report?



2. What are three company policies you may need to adhere to when distributing a review report via email?



Part B

Read the case study and then answer the questions that follow.

Case study

Juan is a Digital Strategist at Direct2U, a mail redirection service. Juan has conducted a review of the organisation's digital strategy and identified a number of recommendations. He is in the process of developing a review report for senior management.

1. In addition to the recommendations Juan has identified, what other information would he include in his draft report?

2. During the process of creating the draft, the report undergoes a number of changes. What version control information should Juan include each time a new version of the draft is created?

3. Juan has completed the draft and plans to distribute it via email to the senior management team. What are four checks Juan should perform on his email before he clicks 'send'?

4. Juan receives requests for a number of changes to the review report from the management team. What are three questions Juan should ask himself before implementing these changes in the document?

5. Juan has made some updates to the report and is ready to proofread. He has already run the document through the spelling and grammar checker in his word processor. Why should he also conduct a manual proofreading check, and what are some ways he can do this?

6. Juan has finalised the report and believes it is ready for sign-off. What are three steps Juan can take to make this process as smooth as possible?



