An InsightaaS/Vision to Value (V2V) Best Practice Report: January 2018

Developing the Analytics Business Case

A VISION TO VALUE (V2V) BEST PRACTICE REPORT

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Developing the Analytics Business Case

The rationale for investing in development of an analytics business case

It’s generally recognized – despite the ancient, oft-cited wisdom of Chinese philosopher Laozi – that a complex endeavour needs to begin with a plan. But as is frequently the case with received wisdom, little attention is paid to the reasons for investing in the plan, and the benefits that it can produce (beyond a general sense of order). Organizations commit to documenting proposed analytics initiatives, but rarely examine the rationale for development of the analytics business case – to the detriment of the plan and the approach that it articulates.

In considering the business case for analytics, the V2V working group launched its investigation by addressing the ‘why?’ question: why is developing the analytics business case important? The group also reviewed the related context: what is changing – in terms of technology, market opportunity or competitive pressure – that makes business case development important?

Throughout the working group session, focus wavered between two separate, but interconnected issues: the development of the case itself, and the objectives for the process described in the case. This two-threaded approach can introduce complexity into discussions of the rationale for investing in development of an analytics business case, but ultimately, it is beneficial: the plan and the process and outcomes it describes are both important, and need to be linked to ensure that analytics professionals take the most direct and surest path to realization of technology benefits. Organizations that understand the analytics business case objectives optimize their chances of building relevant, comprehensive plans, and of ultimately delivering superior analytics initiative results.

Building the analytics business case: process drivers

What drives companies to view the analytics journey as critical to their success, leads to investment in development of the analytics business case, and what is important to building the structure needed to harvest benefit from data-reliant investigations? The working group identified a range of drivers that are prompting action in Canadian organizations today:

- A desire to identify and quantify the value of data within the organization.
- A need to increase internal readiness for analytics adoption; to begin building a foundation for a culture that will accept data as a core component of operations (in both strategy and execution).
• A commitment to collecting, organizing and analyzing data to identify issues in the business (use of descriptive/diagnostic analytics).
• An appreciation of the need to plot out a path to use of advanced analytics to keep pace with a fast-moving global environment. This can be seen as an extension of the previous point, where organizations see a need to move beyond basic analytics in order to accelerate or automate tasks.
• A recognition that organizations realize benefits when they are able to turn data into intelligence. An increasingly digitized business environment produces a great deal of data, but that data is only beneficial when organizations develop an approach to aggregating and learning from the expanding range of inputs.

Figure 1. Building the analytics case: Process drivers and target outcomes

<table>
<thead>
<tr>
<th>Capitalize on insight</th>
<th>A desire to...</th>
<th>A need to...</th>
<th>A commitment to...</th>
<th>An appreciation of...</th>
<th>A recognition of...</th>
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<tbody>
<tr>
<td></td>
<td>Identify and quantify the value of organizational data</td>
<td>Increase internal readiness for analytics adoption; begin building a foundation for a data culture</td>
<td>Collect, organize and analyze data to identify operational issues</td>
<td>The need to plot out a path to use of advanced analytics as a response to rapid change; supporting task acceleration/automation requirements</td>
<td>A need to turn data into intelligence, in order to capture the value of the data itself</td>
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Building the analytics business case: target outcomes
A second set of motivators for analytics business case development, defined as the corporate goals that prompt investment in analytics initiatives, is associated with results rather than process. Based on outcomes, the rationale for investing in an analytics business case is not necessarily linked to the desire to optimize analytics processes, but rather to shape the approach used to deliver on business objectives.

There are many different outcomes that could prompt development of a supportive analytics business case. Three that were highlighted by the working group included:

• **Understanding customers.** Advances in technology (compute and the ability to aggregate large volumes of internal and relevant third-party data) allow companies to understand customers and customer preferences at a very granular level. The analytics business case is tremendously important here: it maps out the process by which companies will identify future customers and
products, improve customer relationships and services – necessary competencies in a digital world.

- Improve quality. Another example offered by the working group focused on quality improvements. In this case, the analytics business case articulates the ways that data will be collected and used to identify and redress process or product problems, providing benchmark information that motivates individual improvement. The example raised in the discussion centred on the healthcare environment, but the principles could be applied in many different settings.

- Uncover/reveal and explore new correlations. This is really a two-part planning issue. The first step is to identify a broad area that would benefit from examination, which creates a business case for aggregation and analysis of internal and relevant external data. The second is to use the results of this analysis to identify opportunities for improvement in the target area. The example used in the working group discussion concerned environmental/CSR issues – but again, the approach of using analytics to increase the scope of executive/corporate understanding and action is applicable in multiple areas.

Building alignment in the analytics business case development process

There’s no single ‘right answer’ that can determine whether development of an analytics business case should focus on outcomes or on an examination of the process itself; both are important. The key to creating an effective analytics business case is to align each of the key factors – executive objectives, a need/opportunity to capitalize on data, a requirement to impose structure on data-reliant investigations and development of a link between the process and its target outcomes – in a single process. The business case is the vehicle by which those who are advocates for change describe the possible future and the process by which it will be delivered.

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In Figure 2. below, alignment is shown as beginning with an understanding of executive objectives. The use of the plural (objectives) is intentional; executives have a wide range of strategic and tactical goals. Analytics projects can launch in response to a single objective or to tackle a discrete, defined set of connected aims; wide-ranging objectives are best addressed through a succession of business cases that target different elements of a central issue. This is an important ‘macro’ consideration in building alignment in the analytics business case development process: it isn’t necessary (nor even desirable) to try to solve all aspects of a complex business problem with a single overarching project; it is much better to work iteratively through the planning and delivery process, delivering substantive change through a series of targeted and measurable initiatives.

The next stages shown in the Figure involve data and process. What is the best way to capitalize on internal (and relevant/complementary external) data, to deliver insight that is applicable to the target executive objective(s)? And what is the best way to structure the analytics initiative to use this data to deliver the insights needed for success?

The final stage is a major issue in many organizations: what is the key to establishing the importance of data in the decision-making process? Many companies lack a ‘data culture’ that treats analytics as an
essential element in determining direction; in many contexts, data is used to justify opinions rather than to shed new light on important issues. The working group noted repeatedly that part of the business case process involves ‘earning trust’ by setting attainable goals and demonstrating success.

Outside of the initiative ‘telescope’ – but still important to the business case assembly process – are a set of ancillary benefits, which should be viewed as benefits of effective analytics business plan development. These include:

- Expanding the scope of executive insight by delivering new insights, which in turn increases the range of operational options available to the organization.
- Increasing IT sophistication/readiness by bringing IT into projects that have clear, tangible business benefit, and aligning IT activities with business requirements.
- Closing the IT/business gap by engaging stakeholders from both areas in definition of a common plan.

These ancillary benefits don’t need to be called out within the plan, but they should be discussed as goals associated with, and realized through the planning process.
Business objectives associated with developing the analytics business case

The second major question tackled by the working group was “What is the business objective associated with developing the analytics business case? If we’re successful, what will change in the organization?”

Responses to this question can be grouped into four categories: *internal data management*, *internal outcomes*, *building the ‘bridge’ between internal and external outcomes*, and *external outcomes*. Key issues raised under each of these headings, and examples of the changes that they drive, are detailed below.

**Internal: data management**

*Securing required resources.* If a firm’s objective is to make better use of data, it’s important to understand whether there is sufficient expertise in house to work with data and produce targeted results, or whether the organization will need to hire additional resources or engage external suppliers. If internal capabilities are an issue, the business case should be clear on the preferred strategy for obtaining necessary skills or bandwidth.

*Establish effective governance.* Over time and across varying objectives, it is inevitable that some data will be required by multiple projects, and that some of the required data will be sensitive or subject to regulatory control or audit. Organizations need to ensure that sensitive data is managed in accordance with compliance requirements, and at the same time, need to be sure that data used in every initiative is consistent (with data used in other investigations) and complete (so that decisions are based on best-available evidence). Data governance standards should be incorporated within each analytics business case, and should reflect policies that span all use cases: the organization should have standards (or defined stages) for data integration and management to ensure that outcomes (for example, decisions on new product developments or customer management approaches) are based on complete and reliable insights, while also assuring management that use of the data is consistent with applicable regulatory and best practice standards. Over time, this adherence to sound governance standards will build trust in corporate data, and confidence in decisions based on that data.

*Create one version of the truth.* Creation of a single standard for evidence used in analytics initiatives may be outside the scope of a business case targeted at a discrete outcome – but it should be an objective within each analytics business case. It isn’t possible to identify – or at least, to compare – areas that require executive attention if the data used in the comparisons (across departments, time or other dimensions) is inconsistent. Each analytics business case should include a plan for ensuring that data is consistent and coherent.

**Internal: outcome focused**

*Optimize quality.* Not every analytics initiative is focused on quality, but the ability to assess quality is dependent on credible, meaningful data that is granular enough to show gaps between different actions or between an action and its target outcome. There may be no requirement to include quality improvements within an analytics case – but in some situations, there may be an ability to identify ways

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When everybody knows what data they have, where it is, that it’s accessible, that it’s compliant...it tremendously improves operational efficiency. Tasks that took months and teams take hours and 1-2 people...
that analytics outcomes could contribute to a clearer understanding of current and achievable quality levels.

*Improve productivity.* Part of the function of the analytics group within an organization should be to establish an “information supply chain” that captures and manages data to deliver best possible outcomes with the greatest amount of automation and repeatability. Firms that define this supply chain – again, both at a corporate level and within the context of a specific business case – should be able to enhance the productivity of analytics resources and the business users/units that they serve.

*Drive process efficiencies.* Aligning data with strategic decisions and tactical approaches allows for establishment of a consistent, top-to-bottom vision of the actions that can and should be taken at all levels of the organization. This fact-based insight into current vs. desired states can help drive (and improve connections between) process efficiencies across multiple individuals, processes and departments.

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**Figure 3. Business objectives driving analytics business case development**

![Diagram showing business objectives driving analytics business case development]

- **Internal: outcome focused**
  - Optimize quality
  - Improve productivity
  - Drive process efficiency

- **Internal: data management**
  - Secure required resources
  - Establish effective governance
  - Create ‘one version of the truth’

- **External: outcome focused**
  - Improve customer relationships
  - Support new product/service development
  - Manage risk

- **Bridge: connect internal and external objectives**
  - Articulate links between answers and actions
  - Define path to optimize time to benefit
  - Establish limits on use of customer data (avoid creepiness)

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‘The bridge’: connecting internal and external objectives

*Articulate the links between answers and actions.* This is a core requirement of the analytics business case: what answers can be extracted from available data, and how do these answers impact the decisions that management will take in directing operations? This process perspective should be explicit in the analytics business case.

*Define the path to optimize time to benefit.* An analytics business case should clearly articulate the path that optimizes time to benefit – the process that most quickly and predictably leads from answer to action.

*Establish limits on use of customer data.* Notwithstanding every other objective highlighted in this section, use of data to personalize responses or offerings can be very unsettling for the customer.
Organizations will need to establish corporate guidelines that reduce the ‘creepiness factor’ in data-rich customer interactions, and reflect these guidelines in individual business cases.

**External: outcome focused**

*Customer intimacy – and reduced churn.* Data is used to support a rich, multi-layered approach to customer, and will increasingly be used to define the best possible approaches to customer interactions. As noted above, it’s importantly to avoid being ‘creepy’ in customer communications. It is also important, though, to use data to identify actions that are wanted or needed. Firms that fail to do this will lose share and relevance; those that do it well can reduce churn and improve customer loyalty. These outcomes help to justify investments in analytics initiatives.

*Support new product/service development.* Not all analytics initiatives are designed to directly support analysis leading to creation of new products/services, but many of those with the greatest financial impact are. Even those initiatives that have different primary objectives need, at some point, to demonstrate how and why they contribute to the success of the organization. Professionals preparing analytics business cases should be sure to articulate the ways that an initiative leads to refinement or development of the goods or services that the organization uses to establish its value to its clients.

*Manage risk.* Risk management is more focused on threat than opportunity. However, as an important part of every executive’s agenda, risk management resonates with senior management as a reason to invest in initiatives and competencies. There are many ways that analytics helps organizations manage risk (the establishment of a single version of the truth, for example). Analytics professionals should articulate links between their initiatives and corporate risk management wherever the impact is clear and compelling.

**Summary**

It’s evident that the analytics business case can address many different and compelling objectives, triggering change in internal processes and/or external customer engagements. Analytics professionals who are cognizant of these objectives and outcomes are well-positioned to develop and deliver business cases that are clearly aligned with needs and opportunities within the organization.
Best practices in developing the analytics business case

Identifying best practices that should be used in preparing the analytics business case occupied the bulk of the working group’s attention. Out of a spirited discussion, the group defined five principles that professionals can use to enhance their own analytics business case development.

1. Each initiative begins by identifying the desired outcome. This is clear in the ‘telescope’ graphic, which positions executive objectives as the starting point for analytics initiatives. The point was reinforced by the working group: one member noted that most corporate activities have the goal of “make money, save money...[or sometimes], drive cultural change.” Additional guidance on this point included the need to be conservative in financial estimates embedded in analytics business cases, especially with respect to impact on future revenue – the group member advised predicing case rationales on 35% of forecasted revenue, in order to focus discussion on process and outcomes rather than on the forecasts themselves.

2. Start with the ‘low hanging fruit’. This advice is applied in many contexts, and is useful here as well: the best way to build corporate confidence in a new technology or approach is to quickly deliver tangible benefits, and the best way to achieve this (in the words of a working group member) is to “take advantage of simple tasks that can yield substantial gains.” A second and related objective is to develop a pattern of success through collaboration; engaging both “information users and information managers” – business and IT professionals – in projects that have limited duration and evident payback, and then recognizing the contributions made by both groups, helps to develop trust and connections that will be valuable in supporting complex future initiatives.

3. Align outcomes with metrics. One expert member of the working group described a framework that spans “problem, approach, outcome and metric.” This construct helps ensure that the analytics business case moves predictably from the executive objectives (“problem(s)”) to the analytics activity (approach) to the objective (“outcome”), and that it explicitly embeds metrics that can be used to establish the success of the initiative – versus prior state, goals, or both.

4. Engage stakeholders with an interest in the problem or outcome. Most corporate investments are cost justified by comparing the cost of a project to the value of a specific target outcome. This is entirely appropriate in areas where benefits are specific to a discrete process – as they would be, for example, with an investment aimed at ironing out a kink in healthcare claims management procedures – or tied to an individual user or user group, as would be the case if an business acquired a PC, productivity software or even a task-specific application like a benefits administration package. With analytics, though, it is often the case that a problem or outcome has impact in multiple areas of the organization. Professionals responsible for the development of an analytics business case are urged to identify these adjacent stakeholder groups, and to describe the institutional benefit that will be derived from the analytics initiative. This may not directly affect the core financial evaluation of a project, but identifying and connecting with management in adjacent areas can help amplify both support for an initiative and awareness of its contribution to organizational success.

5. The fifth category of advice pertains to tying individual analytics initiatives (and their business cases) to broader corporate benefits. Analytics experience creates institutional understanding of the ways that analytics projects create both specific and institutional benefit, and of how to handle issues that arise during the delivery process. The guidance on the left side of Figure 4.
applies to the process of managing specific projects (experiment, learn, optimize), but references as well corporate knowledge that is gained through repeated applications of this process. The guidance on the right – “don’t ‘boil the ocean’ – but don’t miss the bigger vision” is intended to describe the relationship between individual projects and overarching corporate objectives. No one project should be scoped so broadly that it will exhaust management patience and support before it is completed, but each project should be designed to build on outcomes and lessons learned from previous initiatives, through processes, deliverables and data treatments that can benefit future analytics endeavours.

This final point led to a working group discussion that surfaces in many analytics conversations: what is the ideal role for ‘shared resources’ (a formal centre of competency or an informal group of analytics professionals) who support the analytics activities of multiple corporate groups? If the key objective in many analytics initiatives is to get past the limitations imposed by “you don’t know what you don’t know,” a multi-disciplinary team comprised of individuals with different types of skills can contribute perspective and creativity that benefits a wide range of potential engagements, in addition to the skills needed to deliver successfully and the broader understanding needed to impose data governance and develop institutional understanding of best/proven practices. However, this team can sometimes become a barrier to effective use of data. One working group member noted that “you are successful (in building a culture that values analytics) when people ask ‘can I go next?’” This kind of impetus towards analytics needs to build within the operating units; a central project team prompting business users to be proactive in their data use isn’t helpful to building broad interest and buy-in.
Figure 4. Best practices in developing the analytics business case

- Start with simple tasks that have rapid, meaningful payback
- Involve both information users and information managers

Who does the problem/outcome affect? Who else would benefit from a solution?

Don’t ‘boil the ocean’ – but don’t miss the bigger vision
Metrics and milestones

Each Best Practice community managed by InsightaaS ends its investigation of a topic by identifying metrics and milestones that can be used to calibrate the journey towards more effective use of advanced technologies.

Responses from the V2V working group reflected the diverse backgrounds of its members. Different measurements and processes apply in different contexts, and issues that are critical in one industry setting may not apply, or may be understood differently in another.

Observations offered during the working group session included:

*Context trumps statistics.* One member with a marketing role stated that “You need to develop a combination of numbers and an understanding of how these numbers related to target objectives. In the real world, there may not be a one-to-one relationship between activity and outcome; the analytics plan needs to acknowledge and address complexity.” Another member chimed in with the observation that “quantitative analysis is pretty simple; qualitative is more complex,” adding to the notion that simple correlations are less important than an appropriately-nuanced understanding of what the statistics mean in context.

*Processes need to map to target outcomes.* One member with a science background described the process framework as “start with the hypothesis,” and structure metrics to support evaluation of sensitivity and impact assessment. The key milestone is arriving at a point where it is possible to do ‘what if’ analysis using constructed metrics to identify the impact of factors that have effect on a target outcome or situation (for example, the effect of specific factors on behaviour). A second member expanded on this idea, noting that quantifiable outcomes may be more useful for building cohesion across groups (by presenting a shared view of a process, situation, outcome, etc.) than for drilling down into specific success factors.

“Compared to what?” One issue that arose in the metrics and milestones discussion – which isn’t consistently raised in corporate environments – is the basis for measurement. Is analytics success evaluated by comparing a new current state (shaped or informed by analytics) with the previous state? Or is analytics success evaluated against plan? The former would seem to be more germane to an organization, as it evaluates the value of the analytics initiative, but it requires baseline benchmarking that may only exist if it is captured and embedded within the analytics business case; the latter evaluates the success of the case and the accuracy of the planning. Another member noted that the metrics must “always go back to strategy. What metrics are important to gauging progress” at a corporate level, and not simply within a business silo. A third member, agreeing vigorously, pointed to the need to describe milestones in the context of “holistic organizational transformation,” adding that “any framework is helpful in navigating from strategy to processes and roles!”

In the end, there is no single set of metrics that serve as a universal measuring stick for analytics success. Each business case should document its own expectations – for change in a specific area, or for cross-functional or corporate-wide impact – and measure achievement against these goals, and improvement over the prior state. By documenting expectations and impediments to change, the process by which

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1 In addition to V2V, InsightaaS manages the Toronto Cloud Business Coalition, IoT Coalition Canada and Canadian Analytics Business Coalition.
data will be applied to drive that change, the outcomes that will result from improved processes and the measures that reflect the magnitude of improvement, the analytics business case becomes much more than a means of cost-justifying a specific investment. It becomes a window and a guide to the future state of the organization.
About V2V

Vision to Value: The Economics of Data (V2V) is a Best Practices group based in Toronto. It was launched in October 2017 with a steering committee meeting that developed an agenda designed to support business professionals who want to capitalise on “the economics of data’ in their business processes, customer interactions, management decision making and other facets of their operations.

The steering committee’s guidance resulted in V2V adopting an agenda that spans twelve topics organized under three main headers:

Analytics in a business context
- Developing the analytics business case; identifying metrics
- Problem solving: the right data for the right question
- Monetizing data: identifying (and capturing) ROI on analytics
- Introducing analytics to the organization: where and how to begin

Establishing parameters for analytics operation
- Data classification to support standards, governance, privacy and security
- Data integration: expanding the evidence base with metadata and matching
- Data veracity: developing data trust
- Building data architectures: new models for new information sources

Analytics process change
- Value stream mapping: working back from end objective to project plan
- Changing culture and behaviour: socializing analytics success
- Responding to user needs: role-based self-service engagement
- Data visualization: democratizing data access and decision support

V2V members meet regularly by teleconference to produce documents in these series, and hosts Meetups to discuss research findings with the broader V2V community.

Sponsoring member

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About InsightaaS

Dedicated to exploring “the ‘why’ in enterprise technology,” InsightaaS was founded by Mary Allen and Michael O’Neil in 2013. The company operates Canada’s deepest IT content website and provides strategic consulting and channel management guidance to leading firms in Canada, the US and abroad.

In 2015, InsightaaS launched the Toronto Cloud Business Coalition, a community dedicated to the co-creation of Best Practice guidance designed to accelerate adoption and use of cloud in Canada. The tremendous success of the group has spawned three additional communities – IoT Coalition Canada, Canadian Analytics Business Community and V2V: The Economics of Data, plus the CIA-Plus meetup community. These groups continue to help Canadian businesses to capture value from advanced technology.