Utility Analytics® INSTITUTE

2024 ANALYTICS MATURITY ASSESSMENT

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OVERVIEW

ADVANCE TO TOPICS

About UAI

Utility Analytics Institute (UAI) is a utility-led membership organization providing support to the utility industry, advancing the analytics profession and utility organizations of all types, sizes, and analytics maturity levels, as well as analytics professionals throughout every phase of their career. UAI members include over 3,500 individual utility professionals within over 160 utilities, utility agencies, and influential market leaders in the utility analytics industry.

UAI members meet regularly to share experiences and ideas, learning from each other in an effort to continually provide reliable service to their customers, stimulating and meaningful work experiences, and increasing business value to stakeholders.

What is the Analytics Maturity Assessment?

Analytics maturity is the increased ability to affect decision-making through the process of gathering, cultivating, and assembling pertinent information to render a clear and efficient decision path.

Analytics maturity is not a destination; it is an expedition where organizations invest people, money, and time resources toward using analytics throughout an organization to inform, drive, and validate business decisions and outcomes with insights gained through data.

The cooperative work of UAI members demonstrates their dedication to steady progress toward analytics maturity. UAI staff partners with the UAI Executive Advisory Council (EAC) to develop and conduct an Analytics Maturity Assessment (AMA) every other year for member utilities to track the progress of their analytics maturity journey.

Confidentiality

All survey information is confidential and will be shared only with the explicit permission of each utility's EAC representative(s) on a case-by-case basis. All other shared information is aggregated, and the identity of individual utilities and utility agencies will remain anonymous. The unique identifier (2024 ID) was randomized for the 2024 report.

OVERVIEW

ADVANCE TO TOPICS

Methodology

The words “utility” and “utilities” used throughout this report will refer to both utilities and utility agencies who took the 2024 AMA survey. The AMA is a self-assessment tool. As with any self-assessment, the results reflect the judgment and opinions of the individuals completing the survey. UAI analyzes, assembles, and publishes the findings for its members. This self-assessment enables each participating utility to compare its current level on the analytics maturity curve to that of other participating members.

Utilities with parent and subsidiary members select whether they complete the survey as one utility or as separate utilities. Each utility identifies their AMA point of contact to ensure only one response from each utility.

Survey questions are split across seven dimensions within two domains: Leadership (Strategy, People, Analytics Governance, Business Process Integration) and Technical Competency (Data Governance, Analytics Capabilities, Technology & Tools), with points weighted based on response options.

Questions are modernized each survey year and sent to a pilot group for feedback and refinement before release. Although questions from prior years may have changed somewhat, the available points for each dimension remain the same. A maximum of 1,000 points are available within each dimension except for People, which has a maximum of 1,500 points. A total of 7,500 points are available in the assessment, with Leadership having a maximum of 4,500 points and Technical Competency a maximum of 3,000 points.

The standard score (Z-score) for each domain is calculated using the equation $z=((x-\mu))/\sigma$ where:

- z = Z-score.
- x = participant' s domain score.
- μ = the population mean.
- σ = the population standard deviation.

Leadership

Strategy – the degree to which a utility has defined, developed, and implemented an enterprise analytics strategy.

People – the development and success of the organizational model that supports enterprise analytics.

Analytics Governance – the capability of a utility to create and manage analytics processes, policies, and information.

Business Process Integration – the degree to which data and analytics drive business processes and inform key performance indicators (KPIs).

Technical Competency

Data Governance – the overall management of the availability, usability, integrity, and security of data used in an enterprise, including metadata management.

Analytics Capabilities – the current and anticipated capabilities of different business groups to apply basic-to-advanced analytics.

Technology & Tools – the ability to procure the appropriate tools and technologies, and the management of analytics technology adoption across different business groups.

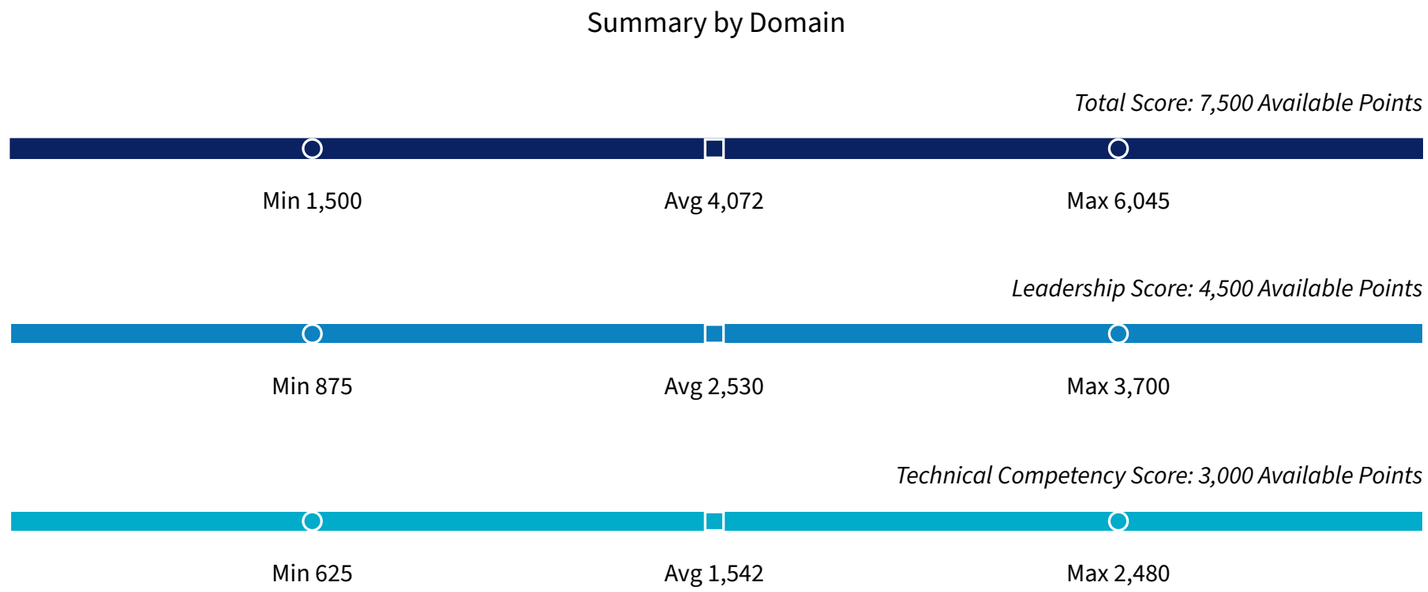
RESULTS

78% survey response rate

UAI sent out 77 invitations to take the survey; 60 utilities submitted their answers for an astounding 78% response rate—equivalent to a 67% increase in responses over the prior survey year! In addition, 53% of the responses came from utilities who have taken the survey in prior years. By responding year over year, these UAI Survey Champions contribute to broader insights for all UAI members and have the ability to track their progress over time.

Overall, minimum scores are higher than in prior years; however, maximum scores, particularly in Technical Competency, are lower, thus reducing average scores. Some of the Survey Champions saw a decrease in their score. There are typically two reasons why a participant's score may be lower than a prior year's score:

1. Because the AMA survey is taken from a perspective; scores can vary from year to year when a different person takes the survey. Taking the survey as a cross-functional team with a staggered rotation of team members provides continuity over time.
2. The ever-expanding boundaries in technology naturally create new learning curves. As the utility industry itself matures in analytics use and exploration, this assessment also evolves and will inherently affect scores.



RESULTS

ADVANCE TO TOPICS

QUADRANT 3

- **Leadership = 2,119 (-16%)**
- **Technical competency = 1,729 (+12%)**
- **Total score = 3,848 (-6%)**

QUADRANT 4

- **Leadership = 3,152 (+25%)**
- **Technical competency = 1,856 (+20%)**
- **Total score = 5,008 (+23%)**

QUADRANT 2

- **Leadership = 1,958 (-23%)**
- **Technical competency = 1,224 (-21%)**
- **Total score = 3,182 (-22%)**

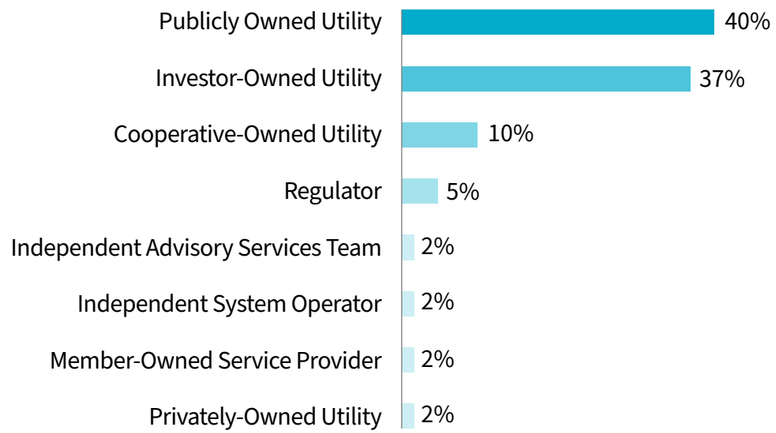
QUADRANT 1

- **Leadership = 2,715 (+7%)**
- **Technical competency = 1,287 (-17%)**
- **Total score = 4,002 (-2%)**

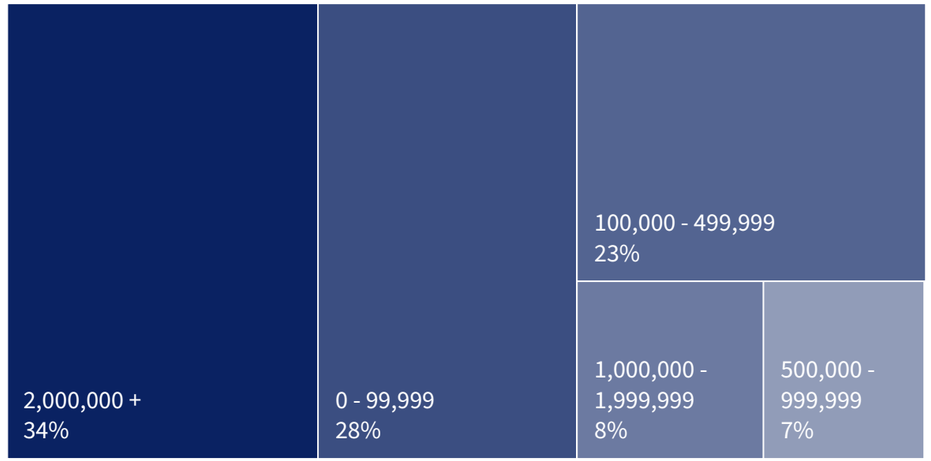
- Leadership score: < = 1,500
- Leadership score: 1,501- 3,000
- Leadership score: 3,001-4,500

DEMOGRAPHICS

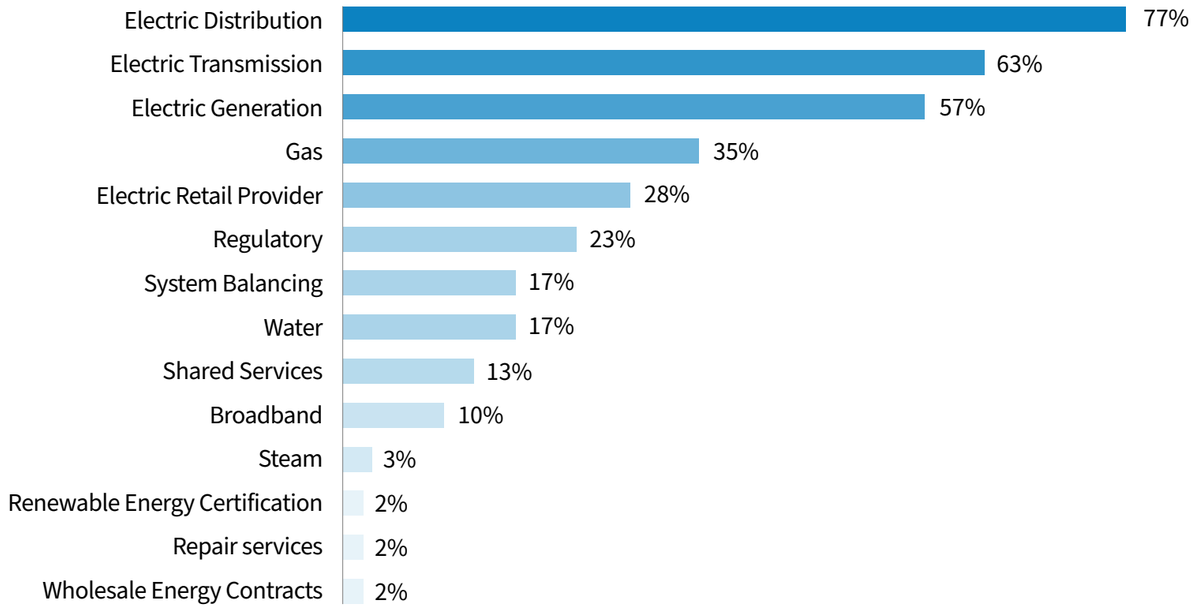
Organization Type



Number of Customers/Members



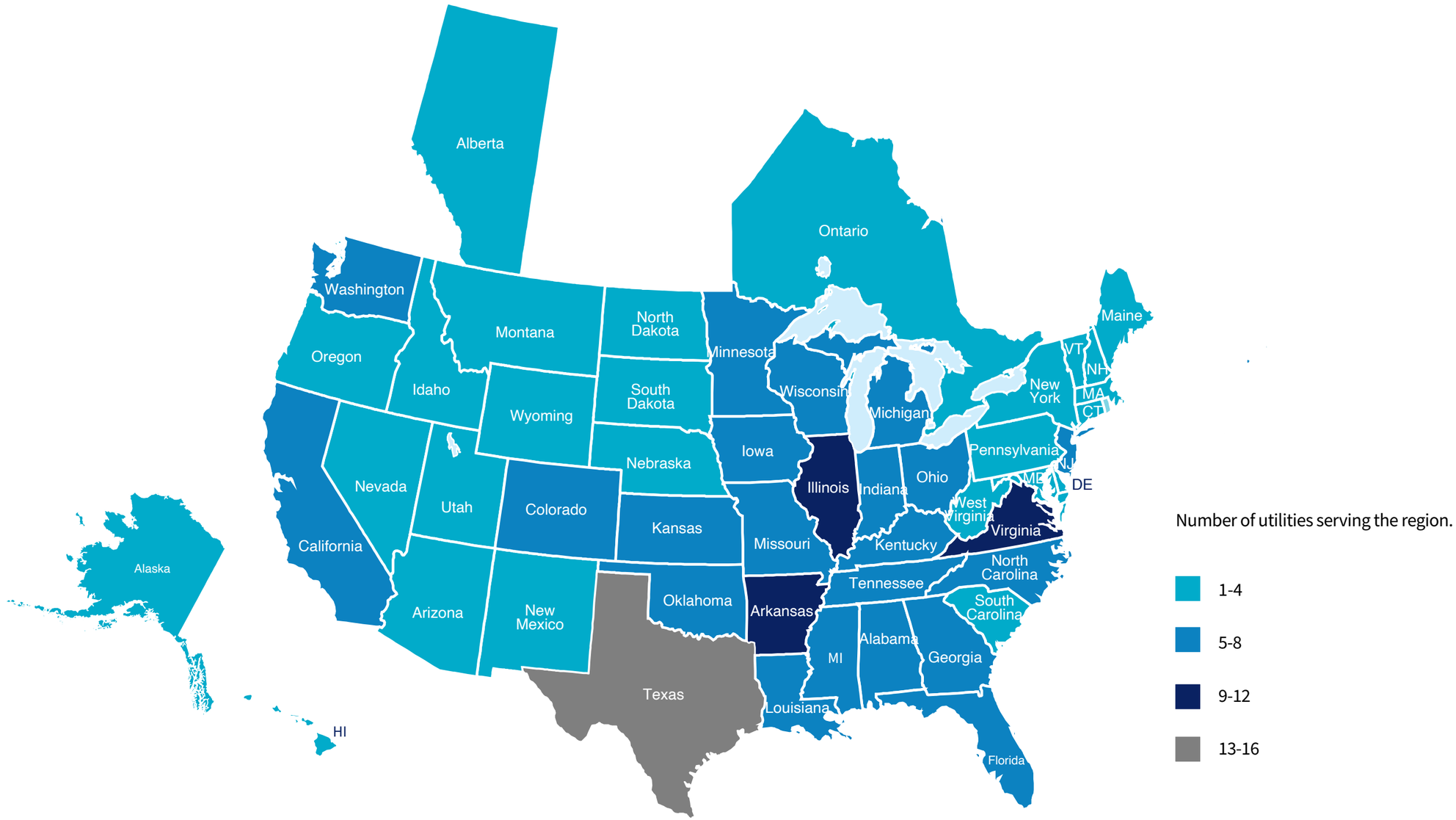
Services



DEMOGRAPHICS

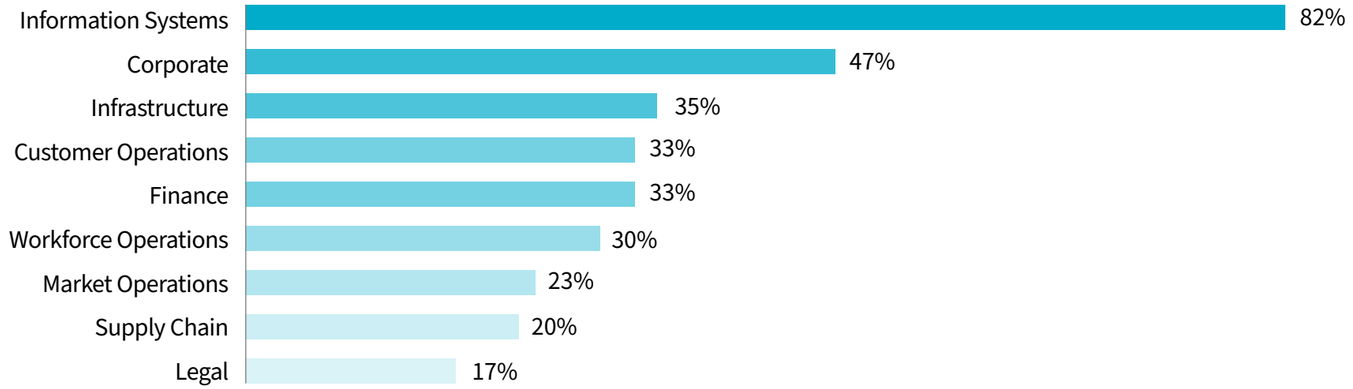
ADVANCE TO TOPICS

States and Provinces Served

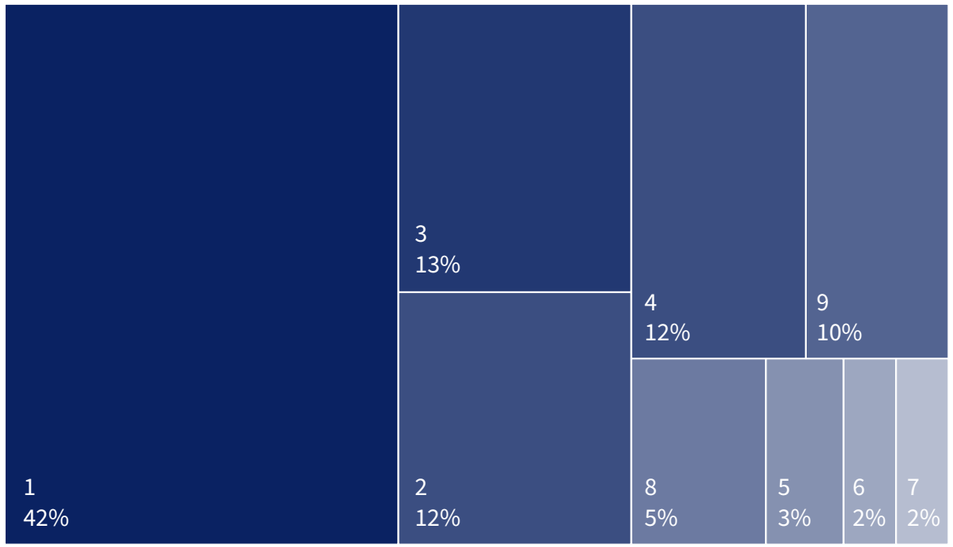


PARTICIPANTS

Which functional groups worked on the survey?



Number of functional groups on a survey team:



PARTICIPANTS

Roles of the individuals leading the survey team:

OBSERVATIONS

STRATEGY

This section evaluates the degree to which the utility has defined, developed, and implemented an enterprise analytics strategy. It also considers the effectiveness of the analytics strategy based on components such as alignment to overall corporate strategy, definition of long-term goals, and drivers for establishing enterprise analytics.

How do you define, develop, and implement an enterprise data strategy? Let's dig into the word strategy to answer that question.

Merriam-Webster Dictionary attributes multiple meanings to the word "strategy" including "a careful plan or method" and interestingly, "an adaptation or complex of adaptation (as of behavior, metabolism, or structure) that serves or appears to serve an important function in achieving evolutionary success (Strategy, n.d.)." "Evolutionary", defined as "a process of continuous change from a lower, simpler, or worse to a higher, more complex or better state (growth) (Evolutionary, n.d.)" is an even more appropriate term for our analytics maturity focus. In fewer words: growth is planned.

Growth is planned

How do you plan growth? Is one plan better than another based on specific circumstances? Strategy will adapt based on the perspective of senior leadership, the resources available, and the organizational challenges being faced.

We call corporate strategy a roadmap for a reason. It provides orientation and direction with milestones (destinations) along the way. However, analytics maturity is not a destination; it is a perpetual journey, "a process of continuous change… to a better state." Putting the two ideas together, we are creating a map to a never-ending adventure.

Strategy is not a one-size fits all concept. Enterprise analytics strategy will vary based on organizational goals, resources, and specific challenges. At the heart of these goals, resources, and even challenges, are people.

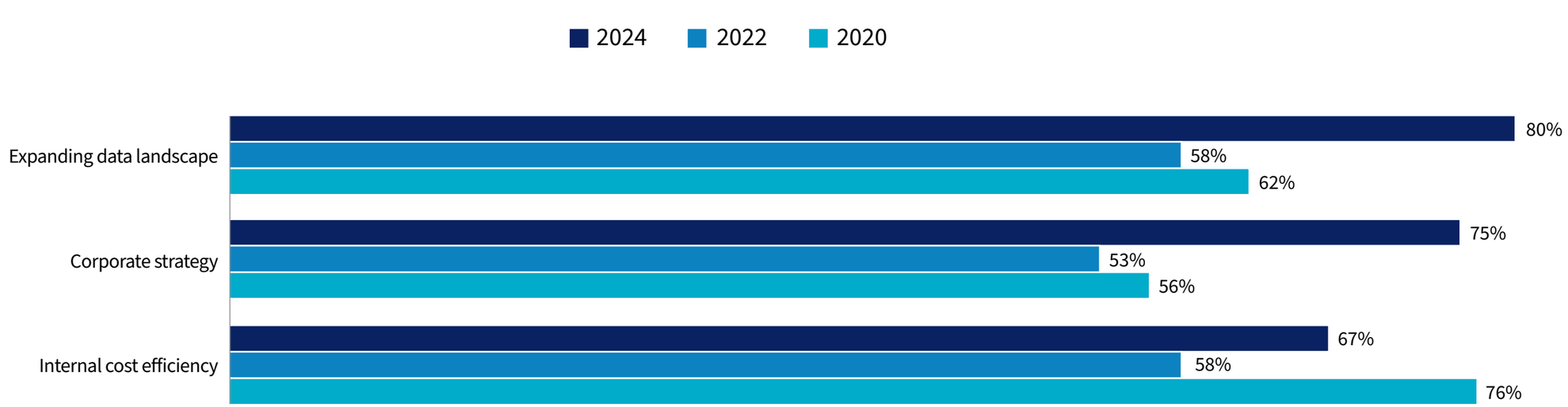
OBSERVATIONS

STRATEGY

Observations

- Utilities with a formalized plan for long-term analytics direction and goals score 17% higher, on average, than other utilities.
- There is a decrease from 67% of utilities in 2022 to 44% in 2024 who report a substantial linkage of their analytics strategy to the overall vision and mission of the organization.
- The top three drivers of analytics initiatives have remained the same over the past three surveys. However, the focus has changed.
  - In 2020, internal cost efficiency was the uniting motivation for analytics initiatives, trailed by an expanding data landscape and then corporate strategy.
  - In 2022, internal cost efficiency was tied with the expanding data landscape, but corporate strategy still finished in third place.
  - In 2024, data is king, but corporate strategy has taken a huge jump into second place with internal cost efficiency trailing in third.

Multi-year comparison of the top 3 drivers of your analytics initiatives



OBSERVATIONS

PEOPLE

This section evaluates:

- *The development and success of the organizational model that supports enterprise analytics.*
- *The quantity and capability of staff supporting analytics as well as the ability of the utility to provide adequate resources and training to staff.*
- *The value of data and analytics perceived by employees across the enterprise.*

Building on the idea of planned perpetual growth and that people are the center of the equation, it is easy to see how important people are in a utility's analytics maturity. Communication, approach, education, and adoption are key components of the process, but they do not transpire as an affective on their own accord; they require planning and coordination.

Invest in people

People are an investment. Finding the right people for the right roles is critical, but immensely more efficient and effective when those roles are defined. The right people will never have all the skills needed to resolve the ongoing challenges utilities face. Change is inevitable and we have to be prepared to adapt and learn, which requires an educational plan.

An educational plan includes:

- Understanding the analytics roles needed within the organization to meet ongoing goals and challenges.
- Ongoing technical and soft skills of the analytics staff.
- Illuminating the significance of including analytics in the organizational strategic plan and the importance of a data and analytics governance foundation to leadership.
- Highlighting the benefits of analytics to leadership and across functional groups and helping them understand the economies of scale gained from making data accessible.

The observations below provide some measurable insight into how people have an affect on analytics maturity.

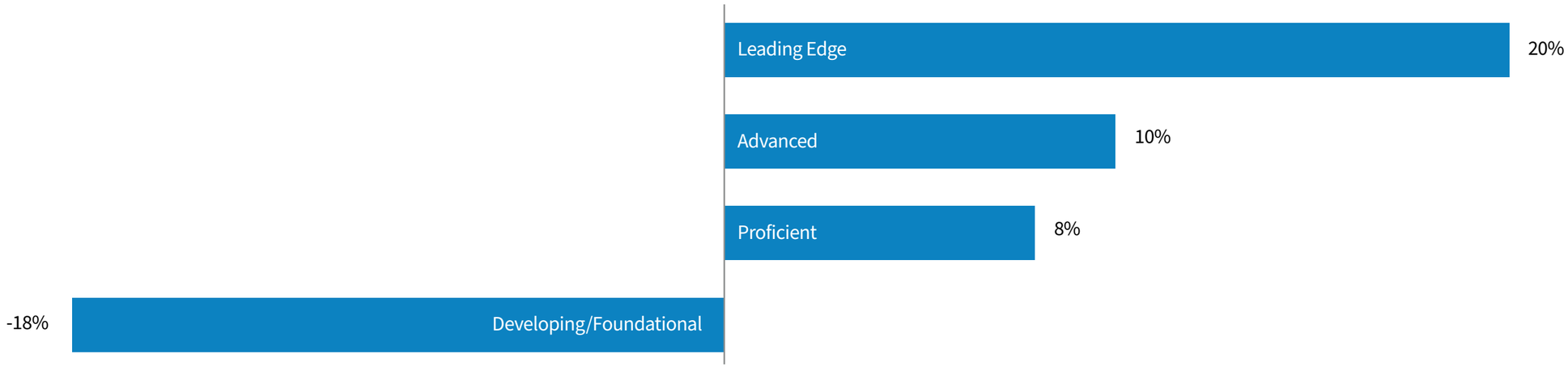
OBSERVATIONS

PEOPLE

Observations

- Only 11% of utilities have their Board driving the analytics initiative. On average, these utilities scored 14% higher than other utilities.
- Data Architects, Data Engineers, and Data Scientists are the roles that most constrain utility analytics teams , with 65-68% of utilities citing limited staffing capacity. Notably, these positions also tend to be among the highest paid within the roles listed in the survey.
- Utilities with enterprise-wide analytics-specific roles and responsibilities defined scored 24% higher than average. 59% of that population, which also indicated a structured growth plan for staff skill set, scored 27% higher than average.
- Overall, utilities with a structured growth for staff skill set scored 17% higher than average while utilities with no plan to invest in their staff's analytics skills scored 26% lower than average.
- Utilities that indicate a staff skill set of "leading edge" scored 20% higher, on average, while utilities indicating a developing or foundational skill set scored 18% lower than average.

The effect of overall staff skill level of the analytics team working within your organization on average scores.



ANALYTICS GOVERNANCE

This section evaluates the capability of the organization to create and manage analytics processes, policies, and information.

There is much discussion about governance in general. We hear a lot about data governance, but what is the meaning of analytics governance? Since analytics governance is not an entry in the dictionary, we need to break it up into its separate words.

Again, we consult the Merriam-Webster Dictionary to define these terms and find analytics to be “the method of logical analysis (Analytics, n.d.).” To complete the word, we find the mathematical definition for “analysis” to be “proof of a mathematical proposition by assuming the result and deducing a valid statement by a series of reversible steps (Analysis, n.d.).” Looking now at the word “governance”, we find the meaning of “overseeing the control and direction of something (Governance, n.d.).”

Combining the words, we find that “analytics governance” is “overseeing the control and direction of proof of a mathematical proposition by assuming the result and deducing a valid statement by a series of reversible steps.” In other words, we are making sure the results of the calculations and models we produce are accurate and reproducible, which is a critical consideration when we realize that the decisions made by these products affect regulatory compliance, rates, reliability, customer experience, and even the safety of our communities.

Accurate and reproducible

OBSERVATIONS

ANALYTICS GOVERNANCE

The logical next question is “How do we oversee the proof of the proposition is accurate and reproducible?” UAI and the EAC identified eight areas of concentration as a guide:

Business value

Should we create this product? Note: business value is not always monetary.

Product integrity

Do we know how the results were obtained, and can we do again and get the same result?

Model reliability

How do we make sure the model continuously produces accurate results as new data reflects environmental and behavior changes?

Security

Are we treating data like the valuable asset that it is by storing it properly and limiting access to it?

Resources

Do we have the adequate resources available to create the analytics product in a manner that ensures integrity and reliability?

Data availability

Do we have access to the pertinent data for the model to create an accurate result?

Feature store

Can we maintain a library of validated models that can be repurposed in other products so that we maintain a standard methodology that is traceable across and saves valuable time?

Deployment

Does our process of moving models from a development stage into production ensure an uncompromised model?

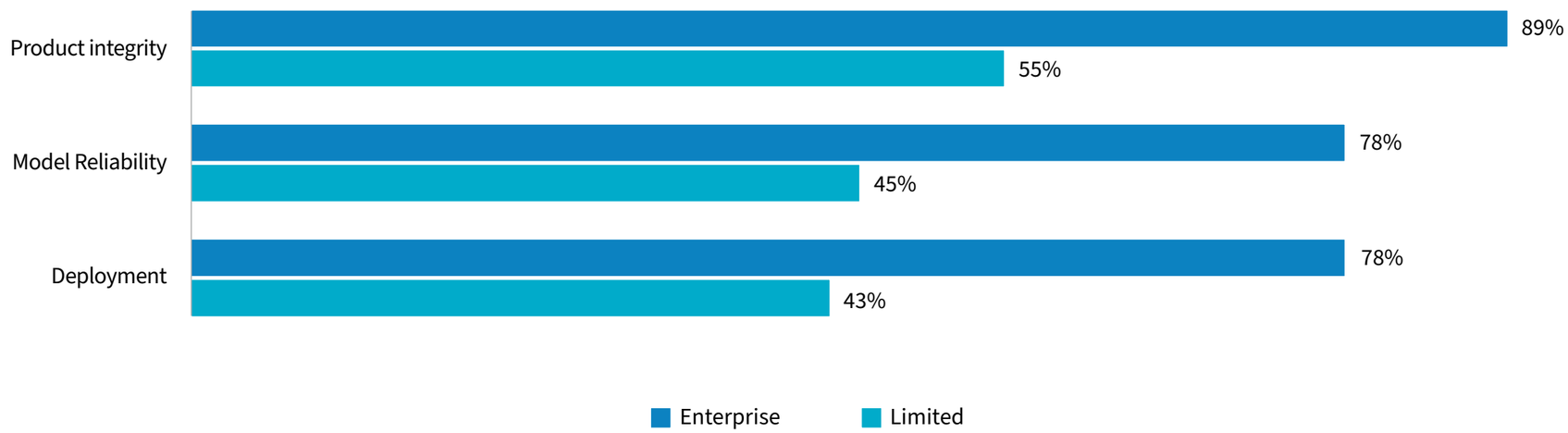
OBSERVATIONS

ANALYTICS GOVERNANCE

Observations

- Utilities are primarily concentrating on data availability and security. The percentage of utilities addressing these areas varies from 81% to 100%, based on the scope of their analytics program.
- Though 82% of the utilities with a nonexistent or limited analytics governance scope are developing predictive models, only 45% of them are focusing on model reliability.
- A much higher percentage of utilities with an enterprise-level analytics program scope are also focused on product integrity, model reliability, and deployment (89% to 78%, respectively) as compared to utilities with a limited or nonexistent scope (55% to 43%, respectively).

Comparing analytics program areas by scope.



OBSERVATIONS

BUSINESS PROCESS INTEGRATION

This section evaluates the degree to which data and analytics drive business processes and inform business KPIs.

How many of the functional groups (departments, divisions, etc.) within the organization are aware of the benefit of analytics? An analytics tool is not always made available through a centralized analytics platform; many of the enterprise systems incorporate business intelligence tools and analytics tools.

Build relationships

If we are not actively engaging with the subject matter experts within the organization about their business challenges, we may not be aware of processes that data and analytics could be standardizing and simplifying for them. In doing so, we build relationships and trust in data and analytics, and we free those experts to research and respond to the insights data and analytics can be used to deliver. But there's more! We effectively increase analytics resources by putting these tools in the hands of people across the organization and we accelerate our analytics maturity in the process.

If you don't have an enterprise-level analytics platform, can you be providing tools to business users by helping them understand what is available to them in the systems they use every day or create something for them in another tool they can easily get access to? Tools that you may consider simplistic may not be part of their everyday processes but are readily accessible to them.

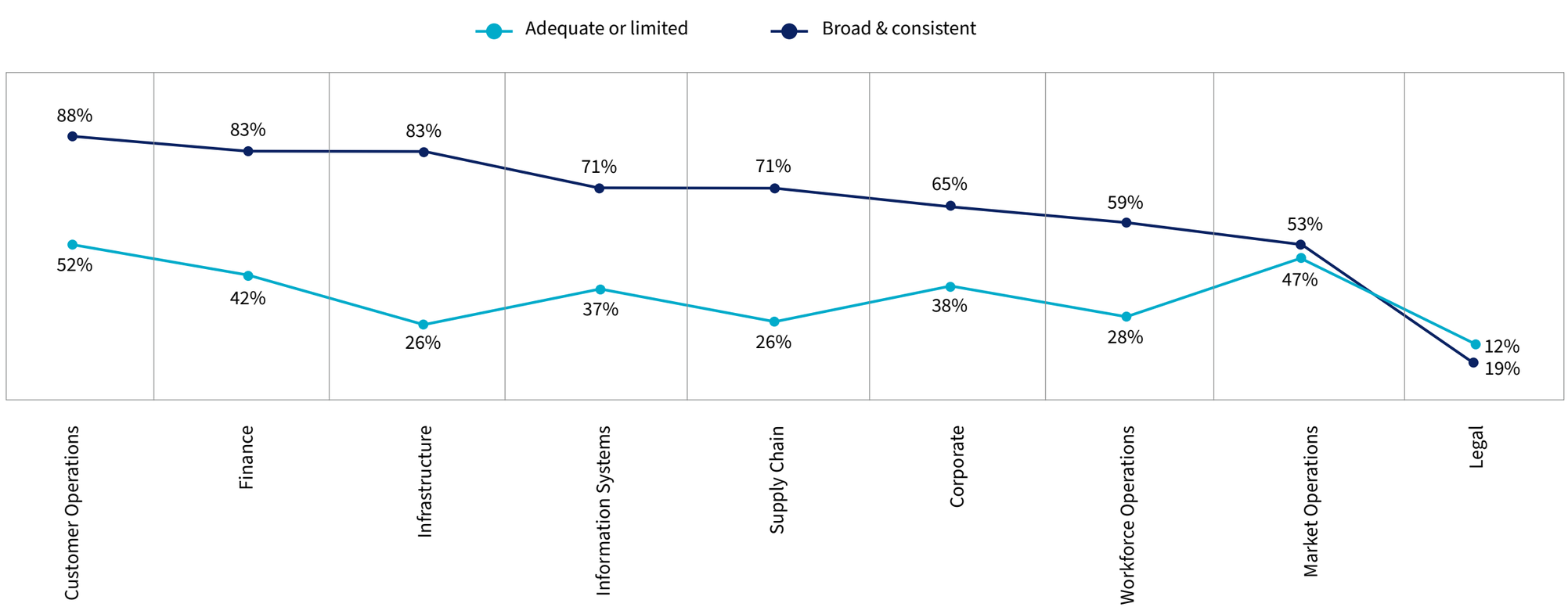
OBSERVATIONS

BUSINESS PROCESS INTEGRATION

Observations

- Utilities who provide broad and consistent access to analytics tools by business users and process owners have a 22% higher average score. Utilities who provide limited access to these tools score, on average, 28% lower.
- On average, functional groups were 90% more likely to use data and analytics to inform the development of KPIs when they have broad and consistent access to analytics tools.

Comparing the degree functional groups use data and analytics to inform the development and measurement of relevant business process KPIs based on access to analytics tools by business users and process owners.



OBSERVATIONS

DATA GOVERNANCE

This section evaluates the overall management of the availability, usability, integrity, and security of data used in the organization, including metadata management.

There's a well-known saying about data: "Garbage in; garbage out." Since bad data (everyone has bad data) can lead to bad decisions, keeping control and direction over it is essential. However, data quality is not the only reason to apply data governance and is not even the data management component UAI utility members are most focused on.

Data Governance affects productivity

Here's a few questions to just scratch the surface of how data governance affects your productivity.

- Can you quickly update all of your data sets when a data source has been modified?
- How do you know you have updated all of them?
- Are you holding on to data so long that it is outdated and negatively affects your models?
- How fast can you get to your data in an emergency and which data has the highest priority?
- How do you know if your data pipeline came to a stop?
- Do you know what data you have available for upcoming analytics projects?

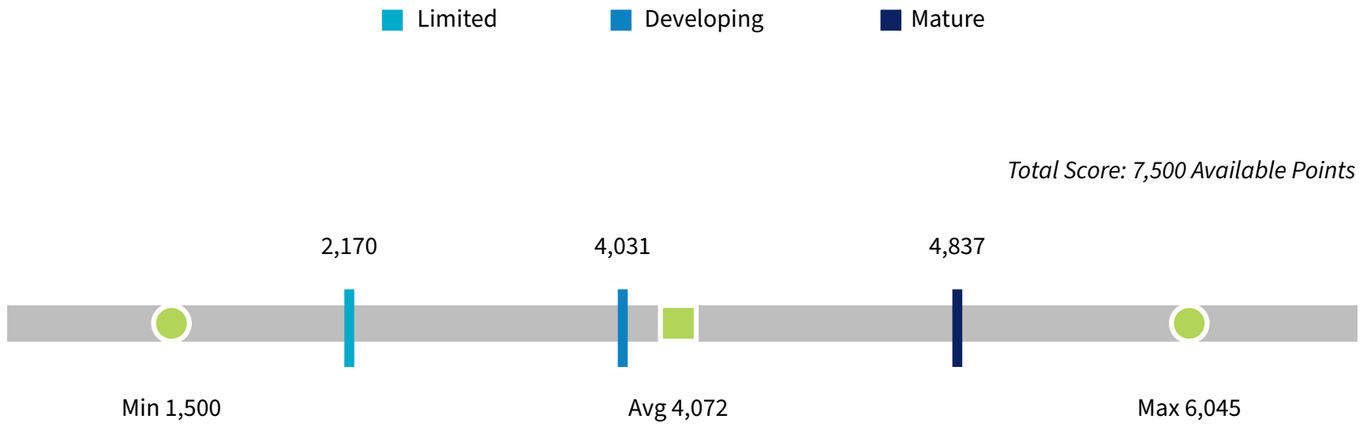
OBSERVATIONS

DATA GOVERNANCE

Observations

- Only 17% of utilities have a mature data governance program; however, 78% of utilities are developing a formal data governance program.
- Utilities are focused on data security: 100% of utilities either have an enterprise-level process for data security or are in progress of doing so.
- On average, 84% of utilities include security in their enterprise analytics governance program. In comparison, only 65% of utilities have progressed to an enterprise-level data governance program for data security.
- 65% of utilities have limited ability to trace the data used in analytics products back to the source.
- Utilities with an enterprise data governance program have a 19% higher than average score; utilities with no data governance program have a 47% lower than average score. Those higher and lower than average scores are illustrated below, next to the benchmarked scores from the Results section above.

Data governance program:



OBSERVATIONS

ANALYTICS CAPABILITIES

This section evaluates the organization's current analytics capabilities across functional groups and as a whole.

Analytics capabilities are born out of necessity to solve ongoing challenges. It is very common for an analytics team to be required to show their analytics capabilities (proof of concept) in order to secure the foundational funding that is needed. The key is to focus on putting processes into place to ensure the accuracy and repeatability of each project so that Analytics Governance (AG) and Data Governance (DG) naturally increase along with Analytics Capabilities.

See the Summary of findings and the Comparison of Analytics Capabilities by Quadrant tables:

- An analytics capability scale (ACS), has also been created to measure these findings using the following formula:

$$ACS = \frac{\textit{Sum of all percentages across all capabilities and functional groups}}{\textit{Total number of combinations (54)}}$$

- The analytics capabilities are listed in order of complexity.
- The box on each table refers to the analytics capability level (ACL), which notes the last level of complexity where more than 50% of utilities have current analytics capabilities within at least one of the functional groups.
- AI refers to the number of AI fields in production.

Summary of findings

Quadrant	ACS	ACL	AI
1	38%	Analysis	17%
2	43%	Forecasting	9%
3	67%	Automation	29%
4	64%	Optimizing	21%

OBSERVATIONS

ANALYTICS CAPABILITIES

Observations

Comparison of Analytics Capabilities by Quadrant

Quadrant 1

Analytics Capability Scale 38%

100% of these utilities have limited or developing Analytics Governance and Data Governance programs.

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	83%	67%	100%	83%	83%	67%	83%	50%	67%
BUSINESS INTELLIGENCE	67%	67%	67%	67%	50%	17%	83%	33%	67%
ANALYSIS	50%	67%	67%	17%	33%	50%	67%	50%	33%
FORECASTING	17%	33%	33%	0%	17%	0%	50%	33%	17%
OPTIMIZING	0%	0%	0%	0%	0%	0%	33%	0%	0%
AUTOMATION	17%	33%	0%	33%	33%	0%	33%	0%	17%

OBSERVATIONS

ANALYTICS CAPABILITIES

Observations

Comparison of Analytics Capabilities by Quadrant

Quadrant 2

Analytics Capability Scale 43%

70% of these utilities have a limited or enterprise-level Analytics Governance program and 87% have a limited or mature Data Governance program, with the remaining 30% and 13%, respectively, being nonexistent.

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	91%	87%	91%	96%	96%	65%	78%	87%	96%
BUSINESS INTELLIGENCE	70%	65%	65%	70%	74%	13%	52%	61%	78%
ANALYSIS	74%	70%	78%	61%	70%	4%	52%	52%	78%
FORECASTING	35%	26%	52%	30%	57%	0%	52%	30%	26%
OPTIMIZING	9%	9%	9%	13%	17%	0%	17%	9%	9%
AUTOMATION	13%	9%	9%	13%	4%	0%	9%	0%	13%

OBSERVATIONS

ANALYTICS CAPABILITIES

Observations

Comparison of Analytics Capabilities by Quadrant

Quadrant 3

Analytics Capability Scale 67%

71% of these utilities have a limited Analytics Governance program and are developing a Data Governance program, while the remaining 29% have no Analytics Governance program and a mature Data Governance program.

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	100%	100%	100%	86%	100%	86%	100%	100%	86%
BUSINESS INTELLIGENCE	100%	86%	100%	86%	100%	14%	71%	71%	71%
ANALYSIS	100%	86%	100%	100%	100%	0%	100%	71%	57%
FORECASTING	86%	57%	100%	71%	100%	14%	86%	57%	71%
OPTIMIZING	29%	43%	57%	57%	86%	0%	86%	0%	14%
AUTOMATION	29%	43%	29%	57%	57%	14%	43%	29%	14%

OBSERVATIONS

ANALYTICS CAPABILITIES

Observations

Comparison of Analytics Capabilities by Quadrant

Quadrant 4

Analytics Capability Scale 64%

67% of these utilities have an enterprise-level Analytics Governance program and 71% have a mature Data Governance program, while the remaining 33% and 29% have a limited or developing program, respectively. Overall, this group includes 78% of the utilities with an enterprise-level Analytics Governance program and 70% of the utilities with a mature Data Governance program.

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	92%	96%	100%	100%	100%	83%	79%	96%	88%
BUSINESS INTELLIGENCE	88%	96%	88%	96%	88%	58%	71%	92%	83%
ANALYSIS	88%	96%	88%	83%	96%	50%	71%	88%	83%
FORECASTING	50%	71%	83%	46%	75%	13%	58%	75%	54%
OPTIMIZING	25%	42%	42%	29%	54%	8%	46%	29%	33%
AUTOMATION	38%	46%	33%	50%	42%	8%	17%	38%	38%

OBSERVATIONS

TECHNOLOGY & TOOLS

This section evaluates the organization's performance in establishing an enterprise analytics architecture, procuring the appropriate tools and technologies, and management of analytics technology adoption across the functional groups.

In his 2011 Interview with The Rolling Stone, Steve Jobs said, "*What's important is that you have a faith in people, that they're basically good and smart, and if you give them tools, they'll do wonderful things with them*."

People are indeed the most important ingredient in analytics maturity, but having the right tools sure helps.

Tools = Productivity

Utilities are exploring new technology. That technology may not be brand new, but it is new to the utility industry. UAI members are exploring and embracing generative AI, robotics, large language models, AMI 2.0, EVs, etc. The list is impressive. Take a look at question 63 and reach out to UAI if you want to get in touch with the utilities exploring these different technologies.

Do you know what data you have available for upcoming analytics projects?

Observations

- Utilities with an advanced analytics toolset have a 32% higher than average total score; those with an integrated analytics toolset have a 5% higher than average total score.
- Utilities with an enterprise analytics architecture scored an average of 22% higher overall.
- Utilities with a Hybrid Cloud Analytics Platform performed 50% higher on their Analytics Capabilities Score and landed at a higher Analytics Capability Level. See the Comparison of Analytics Capabilities by Analytics Platform Host tables.

OBSERVATIONS

TECHNOLOGY & TOOLS

Observations

Comparison of Analytics Capabilities by Analytics Platform Host

On Premise

Analytics Capability Scale 38%

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	100%	86%	100%	100%	100%	57%	29%	86%	71%
BUSINESS INTELLIGENCE	43%	57%	57%	71%	57%	29%	14%	57%	43%
ANALYSIS	71%	71%	71%	57%	71%	43%	14%	29%	43%
FORECASTING	29%	57%	71%	29%	57%	0%	14%	29%	0%
OPTIMIZING	14%	29%	14%	0%	29%	0%	14%	14%	0%
AUTOMATION	0%	14%	0%	14%	0%	0%	0%	0%	0%

OBSERVATIONS

TECHNOLOGY & TOOLS

Observations

Comparison of Analytics Capabilities by Analytics Platform Host

Cloud

Analytics Capability Scale 52%

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	75%	100%	100%	100%	100%	75%	100%	100%	100%
BUSINESS INTELLIGENCE	75%	100%	100%	100%	75%	50%	100%	100%	100%
ANALYSIS	50%	100%	75%	25%	75%	0%	100%	100%	100%
FORECASTING	50%	50%	50%	0%	25%	0%	50%	50%	25%
OPTIMIZING	25%	25%	25%	0%	25%	0%	0%	0%	0%
AUTOMATION	25%	0%	50%	25%	25%	0%	0%	0%	0%

OBSERVATIONS

TECHNOLOGY & TOOLS

Observations

Comparison of Analytics Capabilities by Analytics Platform Host

Hybrid Cloud

Analytics Capability Scale 57%

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	92%	90%	96%	94%	96%	78%	88%	88%	90%
BUSINESS INTELLIGENCE	86%	82%	80%	82%	84%	31%	69%	71%	82%
ANALYSIS	84%	82%	86%	76%	82%	27%	71%	71%	76%
FORECASTING	47%	47%	69%	43%	69%	8%	65%	55%	49%
OPTIMIZING	16%	24%	29%	29%	41%	4%	45%	16%	29%
AUTOMATION	29%	35%	24%	39%	33%	6%	22%	22%	29%

RECOMMENDATIONS

Prioritize

- Recognize data as an asset by listing new data sources available for future projects as part of your analytics project business value.
- Maintain the value of your data by investing in a data management tool to bring data governance and mobility into your processes.
- Focus on the process rather than the code with drag-and-drop tool options that increase analytics capabilities, create standardization, reduce the need to code, improve efficiency, and speed up time-to-market.

Integrate

- Incorporate line items for analytics governance and data governance processes within your project task template.
- Invite stakeholders from multiple functional groups, at various levels, including internal auditors in your project team to get a 360° view of the project and develop relationships, build trust and gain adoption of analytics, and create accountability and traceability of analytics assets.
- Include performance alerts within automated processes and actual vs. forecasted results along with alerts within models for continuous monitoring.

Evangelize

- Reach out to functional groups not heavily utilizing analytics; help them use analytics to resolve their daily challenges and automate routine processes.
- Convert your prioritization process into a marketing tool by making your project intake list highly visible and searchable with descriptions that help business users see how analytics can benefit them.
- Encourage business system owners and users across functional groups to join UAI community conversations and let these member presentations enlighten them about analytics.

DEFINITIONS

FUNCTIONAL GROUPS

CORPORATE

Provides various support functions across the organization, including human resources, safety, security, and communications. Manages corporate governance and oversees strategic planning and initiatives.

CUSTOMER OPERATIONS

Manages the entire customer journey, from account opening and billing to service calls, complaints, and marketing. Ensures customer satisfaction and retention.

FINANCE

Manages the financial health of the organization, including budgeting, forecasting, accounting, and risk management. Ensures financial stability and supports investment decisions.

INFORMATION SYSTEMS

Designs, implements, and maintains the technology infrastructure to support all business operations, including application development and cybersecurity. Also includes data management and analytics where not otherwise contained within a specific functional group.

INFRASTRUCTURE

Designs and monitors the physical infrastructure that produces and delivers the product, including pipelines, power lines, plants, and facilities.

LEGAL

Provides legal advice and guidance on compliance with relevant regulations and laws. Represents the organization in legal matters and manages regulatory affairs.

MARKET OPERATIONS

Manages the trading and optimization of commodities in wholesale markets. Ensures sufficient and efficient product procurement to ensure product availability and maximize revenues.

SUPPLY CHAIN

Procures materials, equipment, and services needed for operations. Manages contracts with vendors and ensures timely delivery at competitive prices.

WORKFORCE OPERATIONS

Oversees the physical delivery of the product. Responsible for field operations, maintenance, construction, and workforce management.

DEFINITIONS

STRATEGY

22. TO WHAT DEGREE DOES YOUR UTILITY TREAT, MANAGE, AND VALUE DATA AS A STRATEGIC CORPORATE ASSET?
LITTLE TO NONE Data is not considered an asset, with minimal or no dedicated resources for its management or analysis.
LIMITED Data is used in specific areas or projects, but not consistently across the organization.
EXPANDING APPROACH Actively building data capabilities and awareness, but not fully mature.
FORMALIZED PRACTICE Data embedded in strategic planning, governance, and decision-making.

23. WHAT ARE THE TOP THREE DRIVERS OF YOUR ANALYTICS INITIATIVES?
CORPORATE STRATEGY Aligning analytics with long-term goals and objectives.
ENVIRONMENTAL CONSIDERATIONS Reducing the impact of or increasing opportunities from our ever-changing environment.
EXPANDING DATA LANDSCAPE Utilizing the wealth of information at our fingertips to make data-informed decisions.
INCREASE REVENUE STREAMS Optimizing existing products/services and identifying opportunities to launch new products/services to improve profitability and customer satisfaction.
INTERNAL COST EFFICIENCY Streamlining processes and reducing operational costs.
DEMOGRAPHIC CHANGES Identifying the evolving customer wants and needs to continuously improve customer experience.
REGULATORY REQUIREMENTS Meeting compliance standards and industry regulations.
RISK MANAGEMENT Proactively identifying and mitigating potential threats.

DEFINITIONS

STRATEGY

24. HOW DO YOU APPROACH ESTABLISHING LONG-TERM ANALYTICS DIRECTION AND GOALS?
REACTIVE FOCUS We primarily prioritize immediate operational needs, with analytics primarily supporting existing processes.
ADAPTIVE ROADMAP We set high-level goals and adjust our analytics approach based on emerging trends and opportunities, revisiting periodically.
FORMALIZED PLAN We have a documented, multi-year plan, revisited periodically, outlining specific analytics objectives and initiatives aligned with future business needs.

26. DESCRIBE THE SCOPE OF YOUR ORGANIZATION'S ANALYTICS STRATEGY.
NONE No formal data and analytics strategy has been defined or documented. Decisions related to data use are ad hoc.
LIMITED A data and analytics strategy exists but does not apply to the organization as a whole.
ENTERPRISE A well-defined data and analytics strategy guides data utilization across all functions of the organization.

27. TO WHAT DEGREE IS YOUR ANALYTICS STRATEGY ALIGNED WITH THE OVERALL VISION AND MISSION OF THE ORGANIZATION?
NONEXISTENT Vision and mission are not considered in analytics planning or execution.
INCONSISTENT Analytics contributes to certain goals, but not consistently or comprehensively.
SUBSTANTIAL Vision and mission are core drivers of analytics initiatives and decision-making.

DEFINITIONS

PEOPLE

28. WHICH LEADERSHIP LEVEL(S) ARE DRIVING THE ANALYTICS INITIATIVE AT YOUR ORGANIZATION?
BOARD Highest governing body sets strategic direction.
EXECUTIVES Top-level managers (CEO, CFO, etc.) responsible for overall operations.
SENIOR LEADERSHIP Department heads or directors driving specific initiatives within the organization.
SUBJECT MATTER EXPERTS Analysts or specialists embedded within specific departments who utilize data for departmental tasks.
DEDICATED ANALYTICS TEAM Centralized team with expertise in data analysis, not tied to any specific department.

29. DESCRIBE YOUR ANALYTICS ORGANIZATIONAL MODEL.
NONEXISTENT No dedicated analytics organization, and future development is not a current priority.
DEVELOPING An analytics organization is actively being planned or implemented.
MATURE A fully operational analytics organization.

30. YOUR CURRENT OR PROPOSED ANALYTICS ORGANIZATIONAL MODEL IS BEST DEFINED AS:
CENTRALIZED Single decision-making body manages and executes all analytics across the organization.
DECENTRALIZED Independent analytics teams in each business unit with no shared structure or collaboration.
FEDERATED Decentralized teams operate with common standards, platforms, or governance, enabling collaboration.
HYBRID Combination of centralized and decentralized elements, balancing control with local expertise.

DEFINITIONS

PEOPLE

31. HOW DOES YOUR ORGANIZATION CURRENTLY DETERMINE ANALYTICS PROJECT ROLES AND RESPONSIBILITIES?
NO FORMAL PROCESS No designated method for assigning roles and responsibilities in analytics projects.
DEPARTMENT LEVEL Individual departments solely define and assign roles and responsibilities for their own analytics projects. Little to no cross-departmental coordination.
ENTERPRISE LEVEL Defined roles and responsibilities for analytics projects are established at the organizational level, applying to all departments. Centralized coordination and governance exist.
HYBRID Combination of department and enterprise-level approaches, with some flexibility within set guidelines.

32. DESCRIBE YOUR ORGANIZATION'S PRIMARY APPROACH TO INNOVATION.
EXTERNAL Vendor partnerships are relied upon to identify areas of opportunity or outside-of-the-box problem solving.
INFORMAL Innovation is encouraged; no formal team has been established.
SPECIALIZED Dedicated teams are set up as needed for a specific purpose or specific functional groups.
ENTERPRISE An enterprise-level team has been established for the sole purpose of exploring innovative solutions and opportunities.

33. HOW DOES YOUR ORGANIZATION ACQUIRE NEW ANALYTICS TALENT?
INTERNAL ACQUISITION Develop analytics skills through training, promotion, and internal recruitment.
EXTERNAL RECRUITMENT Focus on hiring experienced analytics professionals from the external job market.
VENDOR SUPPORT Primarily rely on external consultants or vendors for specific analytics projects or ongoing needs.
EDUCATIONAL PARTNERSHIPS Collaborate with universities or colleges for talent sourcing, internships, or joint research initiatives.

34. HOW WOULD YOU CHARACTERIZE THE OVERALL SKILL LEVEL OF THE ANALYTICS TEAM WORKING WITHIN YOUR ORGANIZATION?
FOUNDATIONAL Basic knowledge and skills, aware of learning needs as the field evolves.
DEVELOPING Competent in core tasks, actively filling knowledge gaps and adapting to new trends.
PROFICIENT Strong understanding of analytics, effectively handling most tasks while recognizing the need for continuous learning.
ADVANCED Highly skilled in various areas, proactively seeking new knowledge to stay ahead of the curve.
LEADING EDGE Expert knowledge and experience, actively shaping the field through innovation and research.

DEFINITIONS

PEOPLE

35. DESCRIBE YOUR ORGANIZATION'S STAFFING CAPACITY FOR VARIOUS JOB ROLES AS DEFINED FOR THIS SURVEY.
STAFFING CAPACITY
LIMITED CAPACITY Struggling to meet current workload demands.
FULL CAPACITY Operating at maximum capacity to meet current demands.
EXCESS CAPACITY Meeting current workload demands with plenty of room for growth.
JOB ROLES
BUSINESS ANALYST Interprets business needs into technical requirements.
DATA ANALYST Gathers, analyzes, and reports on data findings.
DATA ARCHITECT Determines the efficient layout and flow of data within the organization.
DATA ENGINEER Designs, deploys, and maintains data integrations.
DATA SCIENTIST Applies advanced analytics for predictive and prescriptive insights.
SYSTEMS ADMINISTRATOR Ensures stable infrastructure for hardware and software.

DEFINITIONS

PEOPLE

36. HAVE ANALYTICS-SPECIFIC JOB ROLES AND RESPONSIBILITIES BEEN DEFINED AT YOUR ORGANIZATION?
UNDEFINED No formal analytics roles or plans to create them.
IN DEVELOPMENT Initial role outlines exist, but details and responsibilities still evolving.
PARTIALLY DEFINED Some specific analytics roles exist, but responsibilities lack full scope or consistency across the organization.
ENTERPRISE-WIDE ROLES Well-defined analytics roles established and standardized across the entire organization.

37. HOW DOES YOUR ORGANIZATION ACTIVELY INVEST IN BUILDING AND STRENGTHENING THE SKILLS OF ITS ANALYTICS PROFESSIONALS?
NO INVESTMENT No formal skill development programs or plans.
BUILDING STRATEGY Initial framework for skills development underway.
STRUCTURED GROWTH Established programs and resources for continuous learning.

38. DESCRIBE HOW EXECUTIVES IN YOUR ORGANIZATION LEVERAGE ANALYTICS TO MAKE STRATEGIC DECISIONS.
INTUITION LED Decisions primarily rely on experience, intuition, and industry knowledge, with limited use of analytics or data.
DATA INFORMED Intuition guides decision-making, but historical data and expert insights are consulted for validation and deeper understanding.
DATA ENABLED Data analysis plays a key role in identifying options and informing decisions, with intuition used for interpretation and final choice.
DATA GUIDED Decisions are heavily influenced by advanced analytics and insights, even if they challenge initial instincts.
DATA DRIVEN Strategic decisions are primarily based on robust data analysis and advanced analytics, with experience and intuition used to refine or adapt those recommendations.

DEFINITIONS

PEOPLE

39. SELECT ALL THE WAYS YOUR ORGANIZATION CURRENTLY USES DATA AND ANALYTICS.
SUMMARIZE DATA Generate basic reports and visualizations to understand current state.
ESTABLISH AND INFORM KPIs Define key metrics and use data to track progress.
ANALYZE HISTORICAL TRENDS Identify patterns and insights from past data.
DEVELOP PREDICTIVE MODELS Forecast future outcomes based on historical data and trends to influence decision-making.
DEVELOP PRESCRIPTIVE MODELS Generate recommendations and actions to optimize processes and decisions.
EXPLORE EMERGING TECHNOLOGIES Go beyond established tools and techniques to discover innovative ways to solve problems and seize opportunities.

DEFINITIONS

ANALYTICS GOVERNANCE

40. DESCRIBE THE SCOPE OF YOUR ORGANIZATION'S ANALYTICS GOVERNANCE PROGRAM.
NONEXISTENT No analytics governance in place, and future development is not a current priority.
LIMITED Analytics governance exists but is not complete or does not apply to the organization as a whole.
ENTERPRISE An analytics governance program is in place across the organization.

41. YOUR CURRENT OR PROPOSED ANALYTICS GOVERNANCE MODEL IS BEST DEFINED AS:
CENTRALIZED Single decision-making body manages and executes all analytics across the organization.
DECENTRALIZED Independent analytics teams in each business unit with no shared structure or collaboration.
FEDERATED Decentralized teams operate with common standards, platforms, or governance, enabling collaboration.
HYBRID Combination of centralized and decentralized elements, balancing control with local expertise.

42. WHICH OF THE FOLLOWING AREAS DOES YOUR ORGANIZATION'S ANALYTICS GOVERNANCE PROGRAM CURRENTLY ADDRESS?
BUSINESS VALUE Investments in analytics generate business value.
PRODUCT INTEGRITY Accountability, transparency, and traceability of analytics products.
MODEL RELIABILITY Accuracy and performance of analytics models.
SECURITY Secure and compliant management of data, derived data, and analytics products.
RESOURCES Availability of adequate analytics resources.
DATA AVAILABILITY Availability of data to analysts and developers.
FEATURE STORE Developer access to model features for development of new models.
DEPLOYMENT Standardized process to deploy analytics products into production.

DEFINITIONS

BUSINESS PROCESS INTEGRATION

51. TO WHAT DEGREE DO DATA AND ANALYTICS INFORM THE DEVELOPMENT AND MEASUREMENT OF RELEVANT BUSINESS PROCESS KEY PERFORMANCE INDICATORS (KPIs) FOR EACH FUNCTIONAL GROUP?

NOT AT ALL
KPIs are defined and tracked manually, with limited or no data or analytics input; business processes operate independently of data-driven insights.

SOMEWHAT
Some KPIs incorporate basic data analysis, but insights are not consistently used for development or measurement; data might inform some process improvements, but not systematically or comprehensively.

GREATLY
Data and analytics play a significant role in defining, measuring, and refining key performance indicators; data-driven insights regularly guide process optimization and decision-making for KPIs, and automated systems may leverage data to track and adjust KPIs in real time.

COMPLETELY
Data and analytics are fully integrated into the development and measurement of all relevant business process; KPIs are optimized based on real-time data analysis and feedback loops; advanced analytics and automation drive process efficiency and performance improvement.

NOT APPLICABLE
The organization does not include a functional group matching the description provided for the purpose of this survey.

52. DESCRIBE THE ACCESS TO DATA AND ANALYTICS TOOLS BY BUSINESS USERS AND PROCESS OWNERS.

LIMITED AND INCONSISTENT
Access varies across groups, often lacking self-service tools and facing data silos.

ADEQUATE WITH CHALLENGES
Basic tools available, but access control, training, or data limitations hinder full utilization.

BROAD AND CONSISTENT
Standardized tools and data access across groups, enabling self-service analysis and informed decision-making.

DEFINITIONS

DATA GOVERNANCE

43. DESCRIBE THE STATE OF YOUR ORGANIZATION'S FORMAL DATA GOVERNANCE PROGRAM. NOTE: THE FORMAL DATA GOVERNANCE PROGRAM MUST MANAGE AT LEAST ONE OF THE FOLLOWING DATA ASPECTS: AVAILABILITY, USABILITY, INTEGRITY, SECURITY.
NONEXISTENT No formal data governance program, and future development is not a current priority.
DEVELOPING A formal data governance program is actively being planned or implemented.
MATURE A formal data governance program is in place.

44. YOUR CURRENT OR PROPOSED DATA GOVERNANCE MODEL IS BEST DEFINED AS:
CENTRALIZED Single decision-making body manages and monitors data governance across the organization.
DECENTRALIZED Independent analytics teams in each business unit with no shared structure or collaboration.
FEDERATED Decentralized teams operate with common standards, platforms, or governance, enabling collaboration.
HYBRID Combination of centralized and decentralized elements, balancing control with local expertise.

46. DESCRIBE THE SCOPE OF YOUR ORGANIZATION'S DATA DICTIONARY.
NONEXISTENT No data dictionary in place, and future development is not a current priority.
LIMITED A data dictionary exists but does not apply to the organization as a whole.
ENTERPRISE A data dictionary is in place for data across the organization.

47. DESCRIBE THE STATE OF YOUR ORGANIZATION'S FORMAL PROCESS TO MAINTAIN AND UPDATE THE DATA DICTIONARY.
NONEXISTENT No formal process in place, and future development is not a current priority.
DEVELOPING A formal process to maintain and update the data dictionary is in progress.
MATURE A formal process to maintain and update the data dictionary is fully operational.

DEFINITIONS

DATA GOVERNANCE

48. TO WHAT DEGREE HAS YOUR ORGANIZATION ADOPTED DATA MANAGEMENT STANDARDS?
NONEXISTENT No data management standards in place, and future development is not a current priority.
DEVELOPING Adoption of data management standards is planned or in progress.
MATURE Data management standards have been adopted.

49. DESCRIBE YOUR ORGANIZATION'S ABILITY TO TRACE THE DATA USED IN ANALYTICS PRODUCTS BACK TO THE ORIGINAL SOURCE?
LITTLE TO NONE No formal mechanism or attempt at data traceability.
LIMITED Partial traceability for some analytics products; gaps require manual effort.
GENERAL Established system for basic data lineage but lacks granularity or automation.
FULLY TRACEABLE Automated and comprehensive data lineage mapping for all analytics products.

DEFINITIONS

DATA GOVERNANCE

50. INDICATE YOUR ORGANIZATION'S PROGRESS TOWARD ENTERPRISE-LEVEL IMPLEMENTATION OF THE DATA MANAGEMENT COMPONENTS AS DEFINED BY DATA MANAGEMENT ASSOCIATION (DAMA).
PROGRESS
NONE No future plans identified.
IN PROGRESS Deployment planned and/or in progress.
IN PLACE Deployed across the organization.

DEFINITIONS

DATA GOVERNANCE

50. INDICATE YOUR ORGANIZATION'S PROGRESS TOWARD ENTERPRISE-LEVEL IMPLEMENTATION OF THE DATA MANAGEMENT COMPONENTS AS DEFINED BY DATA MANAGEMENT ASSOCIATION (DAMA).
COMPONENTS FROM THE DATA MANAGEMENT BODY OF KNOWLEDGE (DMBOK) 2ND EDITION. (DAMA.ORG/CPAGES/BODY-OF-KNOWLEDGE).
DATA GOVERNANCE The exercise of authority, control, and shared decision-making (planning, monitoring, and enforcement) over the management of data assets.
DATA ARCHITECTURE Identifying the data needs of the enterprise (regardless of structure) and designing and maintaining the master blueprints to guide data integration, control data assets, and align data investments with business strategy.
DATA MODELING AND DESIGN The process of discovering, analyzing, and scoping data requirements, and then representing and communicating these data requirements in a precise form called the data model. This process is iterative and may include a conceptual, logical, and physical model.
DATA STORAGE AND OPERATIONS The design, implementation, and support of stored data to maximize its value.
DATA SECURITY Definition, planning, development, and execution of security policies and procedures to provide proper authentication, authorization, access, and auditing of data and information assets.
DATA INTEGRATION AND INTEROPERABILITY Managing the movement and consolidation of data within and between applications and organizations.
DOCUMENT AND CONTENT MANAGEMENT Planning, implementation, and control activities for lifecycle management of data and information found in any form or medium.
REFERENCE AND MASTER DATA Managing shared data to meet organizational goals, reduce risks associated with data redundancy, ensure higher quality, and reduce the costs of data integration.
DATA WAREHOUSING AND BUSINESS INTELLIGENCE Planning, implementation, and control processes to provide decision support data and support knowledge workers engaged in reporting, query, and analysis.
METADATA MANAGEMENT Planning, implementation, and control activities to enable access to high quality, integrated metadata.
DATA QUALITY The planning, implementation, and control activities that apply quality management techniques to data in order to assure it is fit for consumption and meets the needs of data consumers.

DEFINITIONS

ANALYTICS CAPABILITIES

53.-61. WHICH OF THE FOLLOWING ANALYTICS CAPABILITIES DOES YOUR ORGANIZATION CURRENTLY UTILIZE FOR EACH FUNCTIONAL GROUP?

REPORTING
Arranging historical data together in a basic report with no insights highlighted.

BUSINESS INTELLIGENCE
Creating dynamic dashboards that intuitively identify when and where something happened.

ANALYSIS
Statistical analysis of historical data to identify patterns and trends.

FORECASTING
Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.

OPTIMIZING
Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.

AUTOMATION
Automated decision-making using analytic insights with continuous monitoring and human oversight.

NOT APPLICABLE
The organization does not include this functional group.

62. INDICATE WHICH FIELDS OF ARTIFICIAL INTELLIGENCE (AI) YOUR ORGANIZATION CURRENTLY HAS IN PRODUCTION. These fields may include multiple subsets that are not expressly identified; may be utilized to increase the effectiveness of other AI fields; and/or may be derived from a combination of fields within AI.

MACHINE LEARNING (ML)
Employs algorithms to learn patterns from data. Examples include predictive modeling, recommendation systems, and image recognition.

NATURAL LANGUAGE PROCESSING (NLP)
Enables machines to understand, interpret, and respond to human language. Examples include chatbots, language translation, and sentiment analysis.

LARGE LANGUAGE MODELS (LLM)
Enables machines to understand, interpret, and respond to human language. Examples include knowledge based chatbots, language translation, and summarization.

COMPUTER VISION
Utilizes algorithms to enable machines to interpret and make decisions based on visual data. Examples include facial recognition, object detection, and image segmentation.

ROBOTICS
Blends mechanical engineering and computer science to create systems capable of performing tasks autonomously or semi-autonomously.

GENERATIVE AI
Utilizes multiple fields of AI to create new content, such as images, text, or audio, by learning patterns and structures from existing data.

INTELLIGENT SEARCH
Applies multiple AI fields to comprehend user queries, retrieve relevant information, and personalize results based on user behavior to enhance the accuracy and relevance of search results.

PERSONALIZED RECOMMENDATIONS
Combines ML and NLP to proactively make personalized suggestions based on user preferences, behaviors, and interactions.

VENDOR APPLICATIONS ONLY
AI has only been utilized or explored through out-of-the box vendor solutions that have incorporated AI into their solution.

DEFINITIONS

TECHNOLOGY & TOOLS

64. DOES YOUR ORGANIZATION HAVE AN ENTERPRISE ANALYTICS ARCHITECTURE CURRENTLY IN PLACE?
NONEXISTENT No enterprise analytics architecture in place, and future development is not a current priority.
DEVELOPING An enterprise analytics architecture is planned or in progress.
MATURE An enterprise analytics architecture is in place and fully functional, expanding as needed.

65. TO WHAT EXTENT IS YOUR ORGANIZATION INTEGRATING INFORMATION FROM VARIOUS SOURCES ACROSS THE ORGANIZATION?
SILOED Data remains isolated within systems requiring manual extraction.
BASIC CONNECTIVITY Integration exists between systems.
FOCUSED DATA HUB Strategic data selection with automated refresh for key use cases.
ENTERPRISE DATA HUB Unified platform with seamless automated data flows for centralized insights.

66. TO WHAT EXTENT DOES YOUR ORGANIZATION LEVERAGE EXTERNAL DATA SOURCES?
NONE No external data sources are currently used.
LIMITED Occasional manual integration of specific external data points.
SUPPLEMENTAL External data used for targeted analyses or specific projects.
EMBEDDED External data is routinely integrated into core analytics pipelines.

67. WHAT IS THE HOSTING ENVIRONMENT FOR YOUR ORGANIZATION'S DATA STORAGE AND ANALYTICS TOOLSET, INCLUDING DATA MANAGEMENT?
ON-PREMISE Hosted exclusively on local servers.
CLOUD Maintained exclusively in a cloud environment.
HYBRID CLOUD Includes both on-premise and cloud solutions.

DEFINITIONS

TECHNOLOGY & TOOLS

68. DESCRIBE YOUR ORGANIZATION'S CURRENT ANALYTICS TECHNOLOGY AND TOOLSET.
LIMITED Primarily manual processes and basic reporting tools.
FUNCTIONAL Stand-alone data management and visualization tools for basic analytics.
INTEGRATED Unified analytics platform enabling data integration and diverse analysis.
ADVANCED Comprehensive architecture with automated workflows, AI/ML integration, and real-time data processing.

69. HOW DOES YOUR UTILITY ASSESS THE NEED FOR UPDATES OR CHANGES TO YOUR ANALYTICS TOOLSET?
LIMITED FOCUS Investment in modernizing our analytics toolset is not a current priority, and we have no plans for a comprehensive evaluation in the near future.
REACTIVE RESPONSE We primarily evaluate our toolset when issues arise such as limitations in capabilities, performance issues, security concerns, or compliance requirements.
PROACTIVE PLANNING We evaluate our analytics toolset at least annually to ensure our ability to meet the organization's strategic goals.
OPPORTUNISTIC We continuously monitor new technologies and emerging trends in analytics tools and proactively assess their potential to enhance our capabilities and deliver value to the organization.

70. WHICH PROCESSES DOES YOUR ORGANIZATION UTILIZE TO EVALUATE AND SELECT ANALYTICS TECHNOLOGIES AND TOOLSETS?
BASIC EVALUATION We have a basic process that involves evaluating a few options, but decisions are primarily based on immediate needs rather than long-term strategy.
STRUCTURED EVALUATION We have a structured process for evaluating and selecting analytics technologies. We consider a defined set of criteria, but the process may not be consistently followed.
PROJECT TEAMS We involve multiple stakeholders in the evaluation process to ensure alignment with various business units and user needs.
VENDOR PARTNERSHIPS Our technology selection process includes collaboration with strategic vendor partners.
INNOVATION-CENTRIC We actively seek and evaluate emerging technologies and innovative solutions to stay ahead of the curve in analytics capabilities.

DEFINITIONS

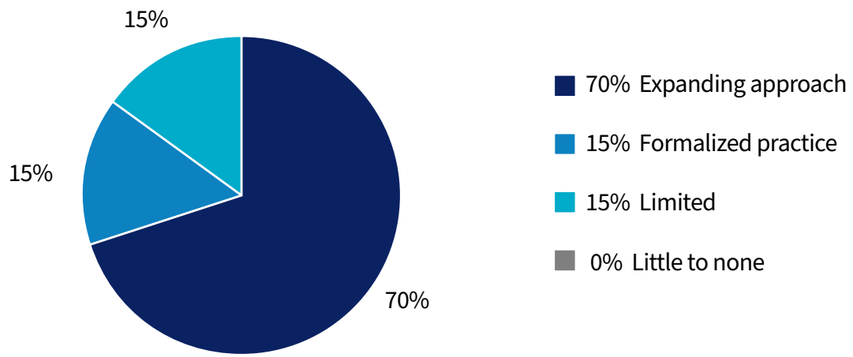
INSIGHTS

71. HOW WILL YOUR ORGANIZATION UTILIZE THIS SURVEY AND RESULTING ANALYSIS?
ASSESS Identify strengths and weaknesses in our current analytics capabilities.
GAUGE Benchmark our analytics maturity against industry peers.
PRIORITIZE Develop a roadmap for improving our analytics capabilities over time.
MEASURE Track progress toward achieving a more mature analytics environment.
EVANGELIZE Utilize the survey results to educate and advocate for increased adoption of data-driven approaches within the organization.
ENGAGE Bring departmental leaders together to discuss organizational goals, identify overlapping opportunities, and envision how data assets and analytical resources will help them to meet those goals together.
INNOVATE Use the survey findings to justify investment in new analytics tools and technologies.
COLLABORATE Contribute to industry research on analytics maturity in the utilities sector.

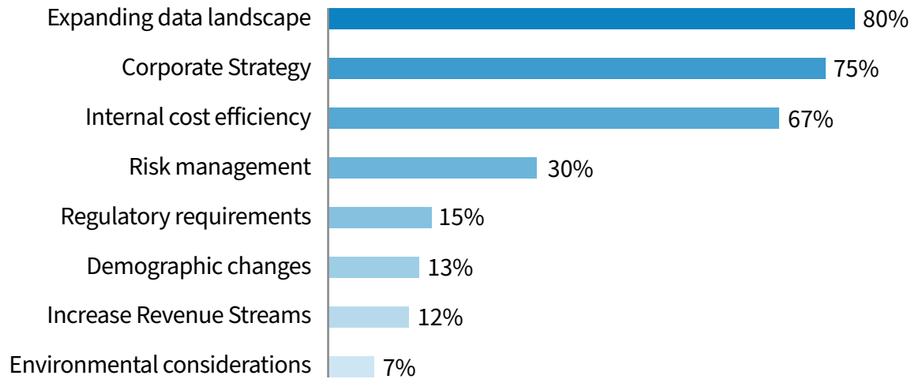
CHARTS

STRATEGY

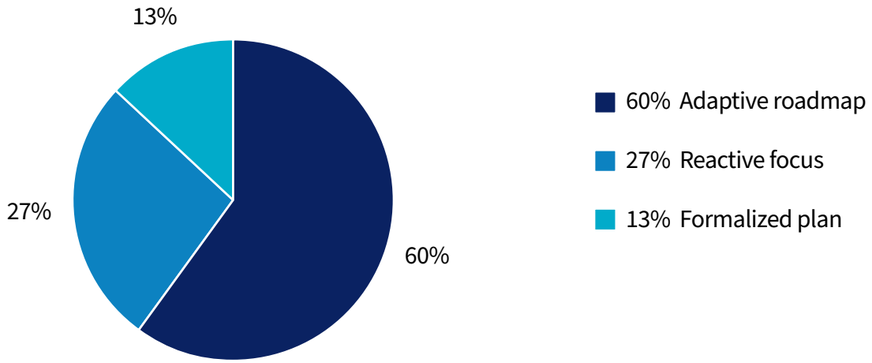
Q22. To what degree does your organization treat data as an asset?



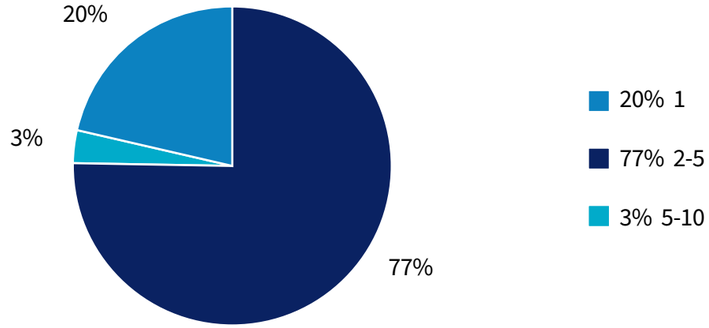
Q23. What are the top three drivers of your analytics initiatives?



Q24. How do you approach establishing long-term analytics direction and goals?



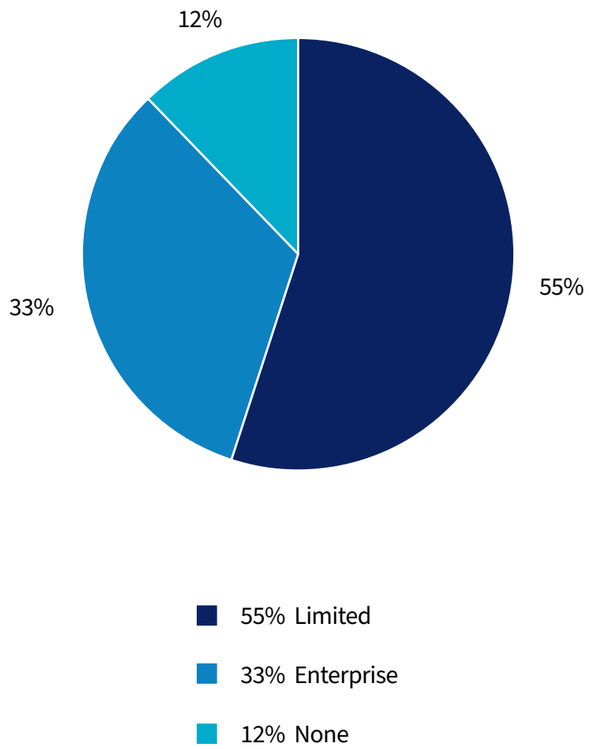
Q25. How many years into the future does your analytics roadmap extend?



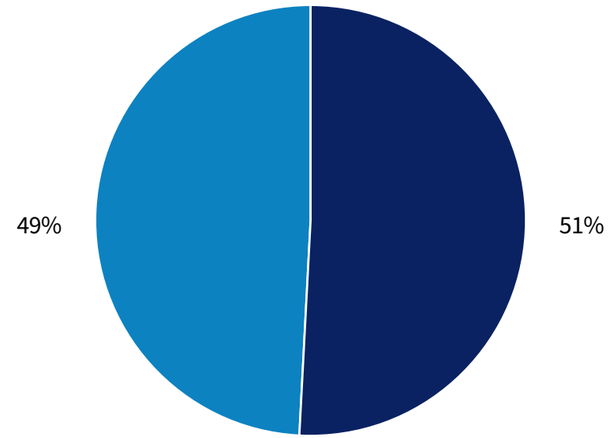
CHARTS

STRATEGY

Q26. Describe the scope of your organization's analytics strategy.



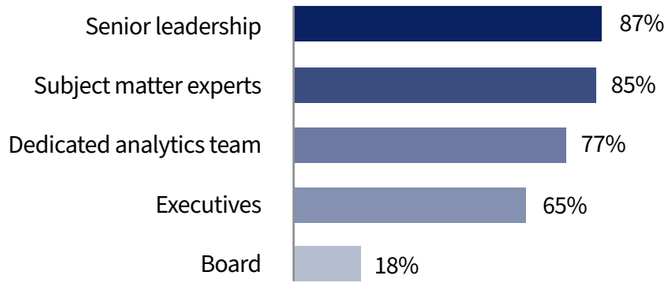
Q27. To what degree is your analytics strategy aligned with the overall vision and mission of the organization?



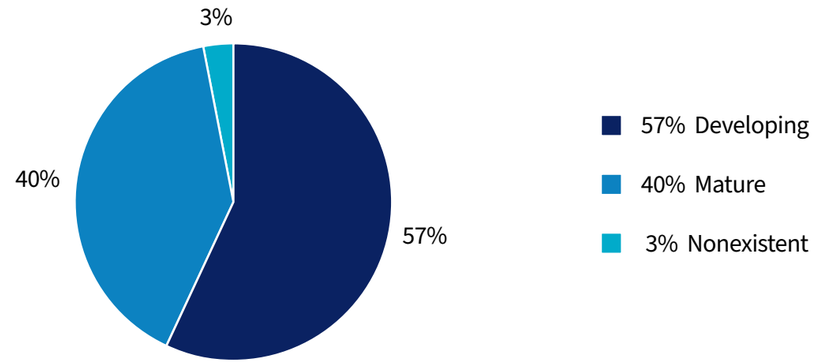
CHARTS

PEOPLE

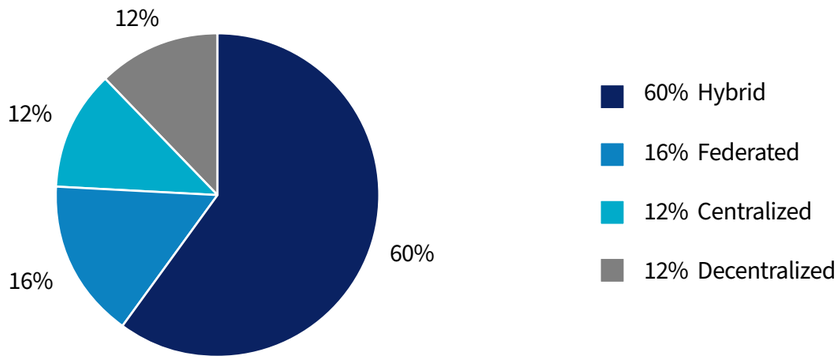
Q28. Which leadership level(s) are driving the analytics initiative at your organization?



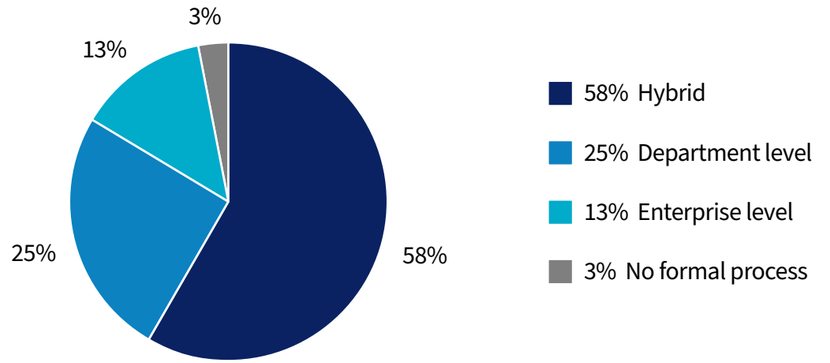
Q29. Describe your ANALYTICS organizational model.



Q30. Your organization's current or proposed "model" is best defined as:



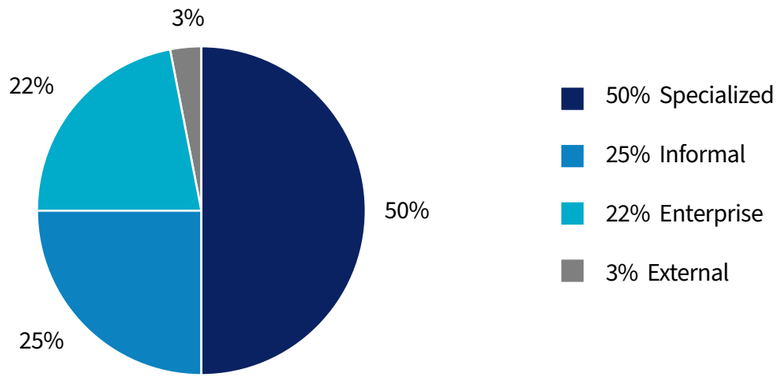
Q.31 How does your organization currently determine analytics project roles and responsibilities?



CHARTS

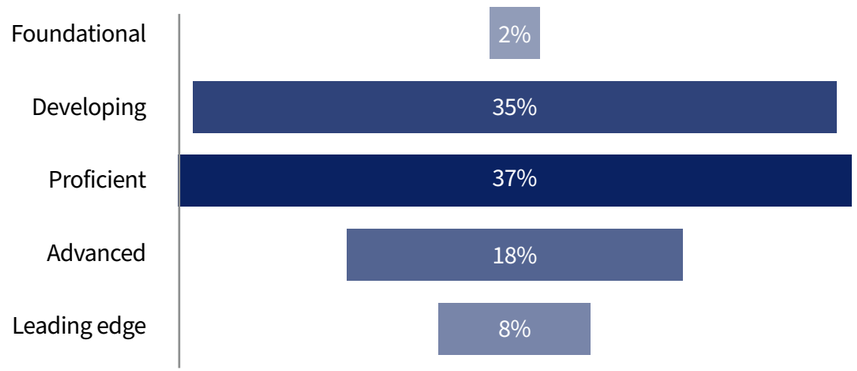
PEOPLE

Q32. Describe your organization's primary approach to innovation.



Q33. How does your organization acquire new analytics talent?

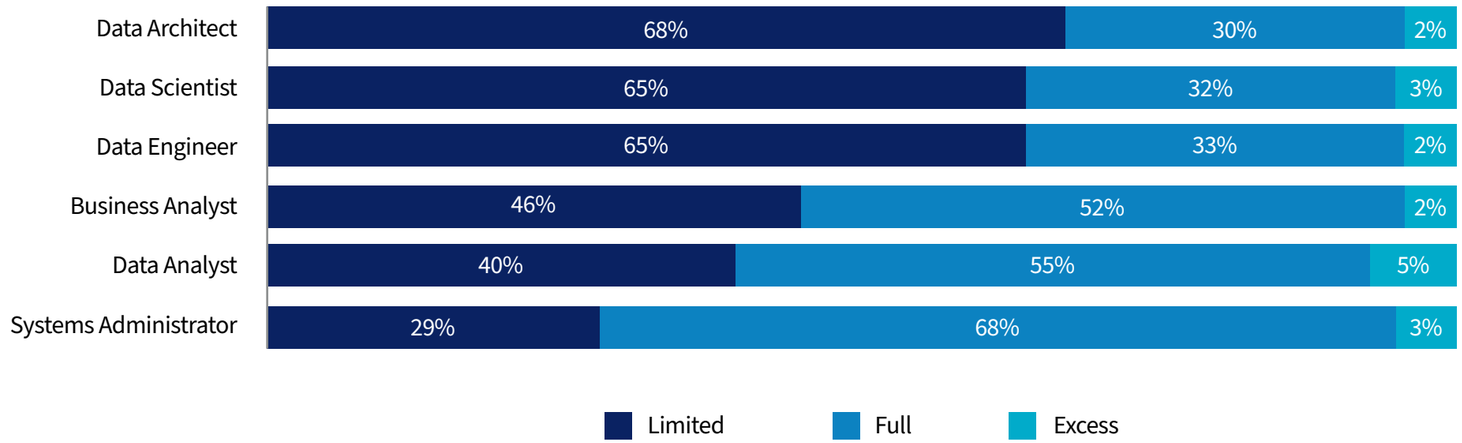
Q34. How would you characterize the overall skill level of the analytics team working within your organization?



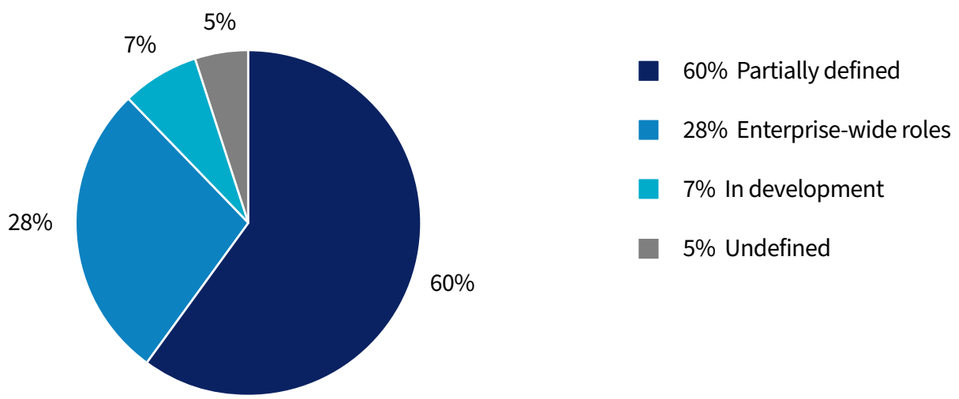
CHARTS

PEOPLE

Q35. Describe your organization's staffing capacity for various job roles as defined for this survey.



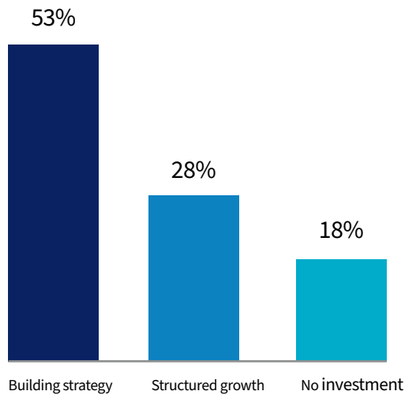
Q36. Have analytics-specific roles & responsibilities been defined at your utility?



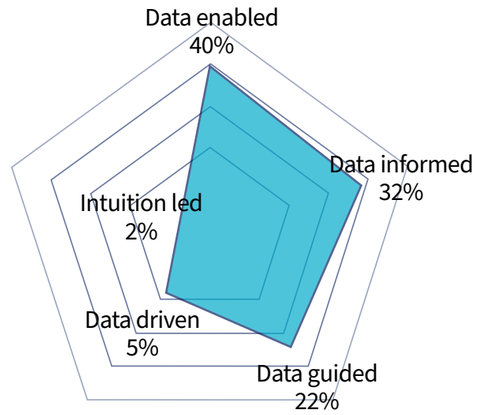
CHARTS

PEOPLE

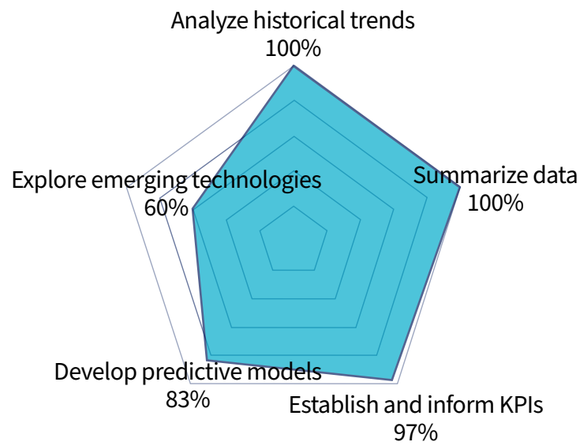
Q37. How does your organization actively invest in building and strengthening the skills of its analytics professionals?



Q38. Describe how executives in your organization leverage analytics to make strategic decisions.



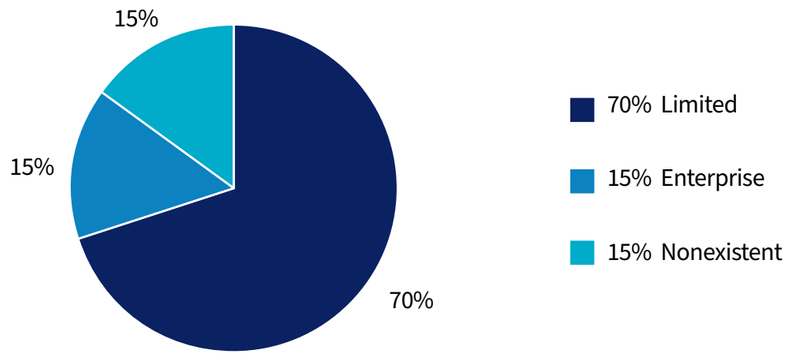
Q39. Select all the ways your organization currently uses data.



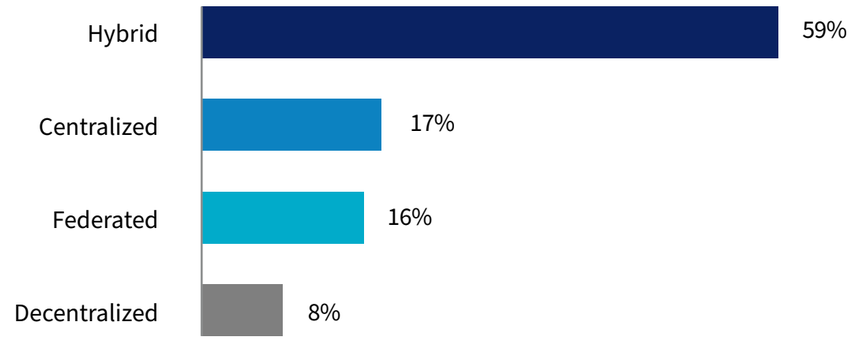
CHARTS

ANALYTICS GOVERNANCE

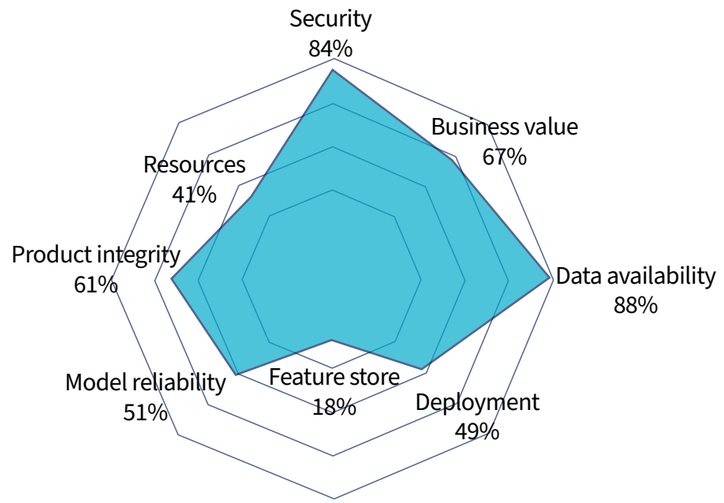
Q40.Describe the scope of your organization's ANALYTICS GOVERNANCE program.



Q41. Your current or proposed ANALYTICS GOVERNANCE model is best defined as:

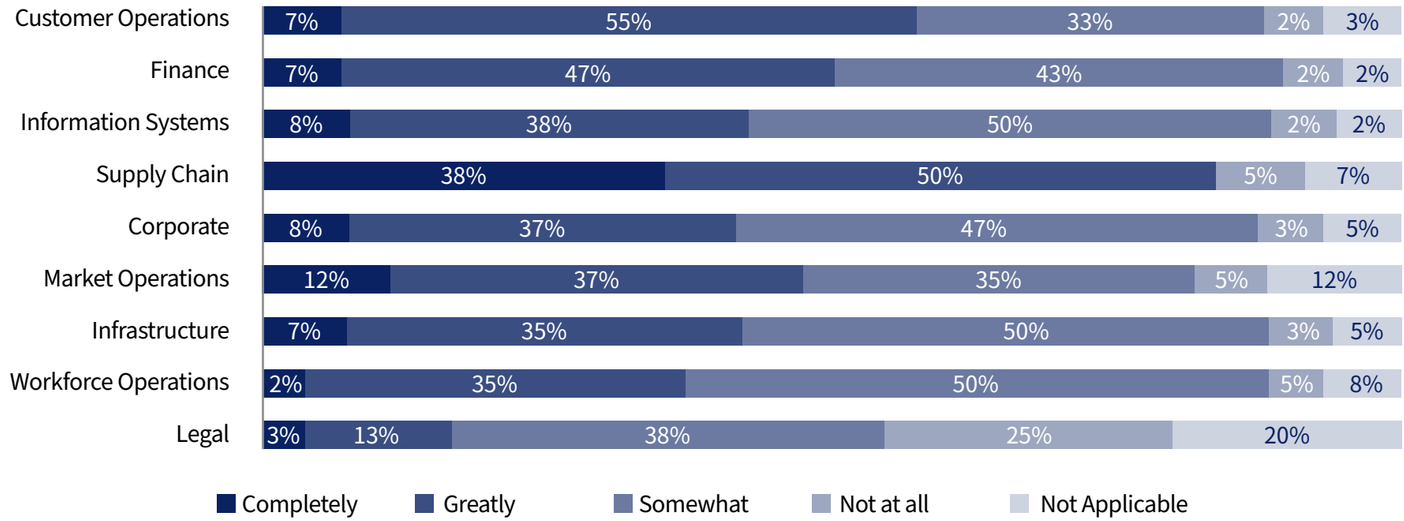


Q42. Which of the following areas does your organization's ANALYTICS GOVERNANCE program currently address?

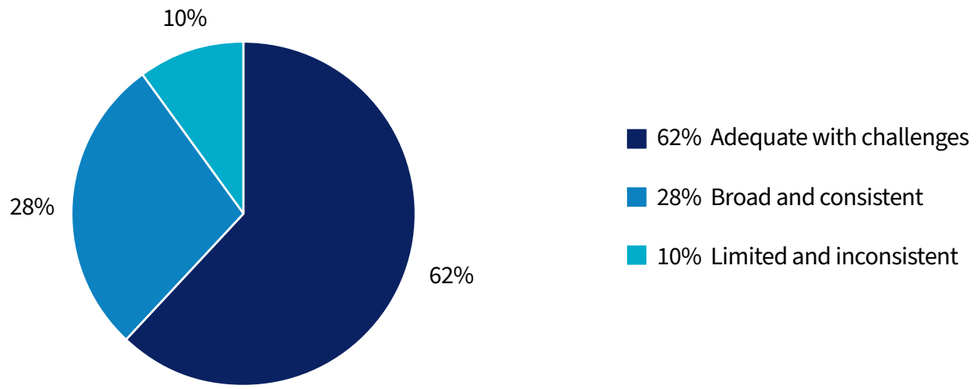


BUSINESS PROCESS INTEGRATION

Q51. To what degree do data and analytics inform the development and measurement of relevant business process KPIs for the following groups?



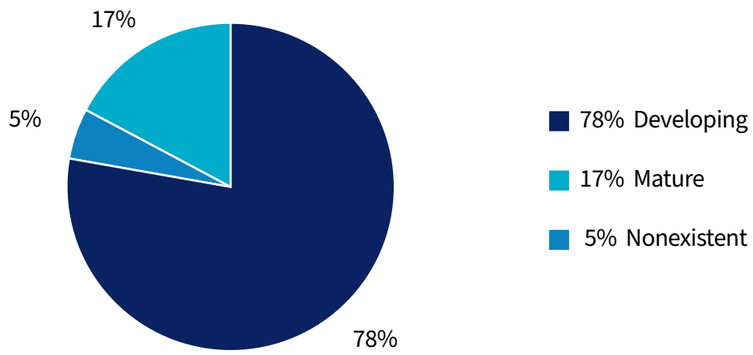
Q52. Describe the access to data and analytics tools by business users and process owners.



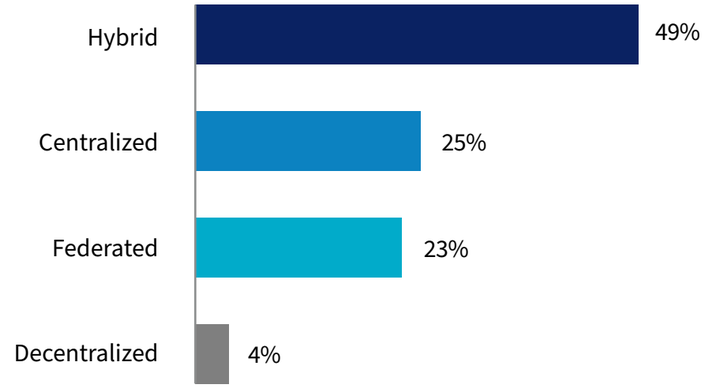
CHARTS

DATA GOVERNANCE

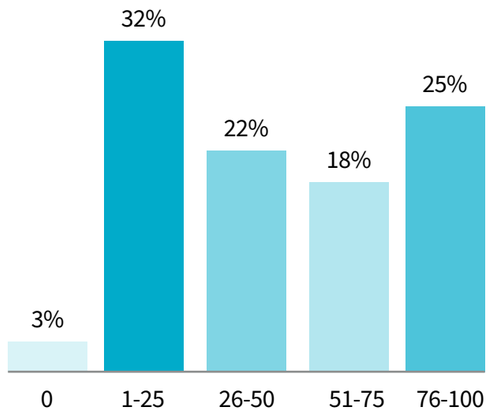
Q43. Describe the state of your organization's formal DATA GOVERNANCE program.



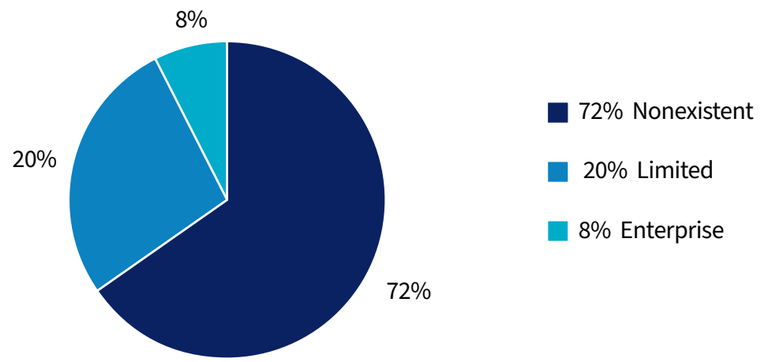
Q44. Your current or proposed DATA GOVERNANCE model is best defined as:



Q45. What percentage of your data sources, data management tools, and analytics tools have been inventoried?



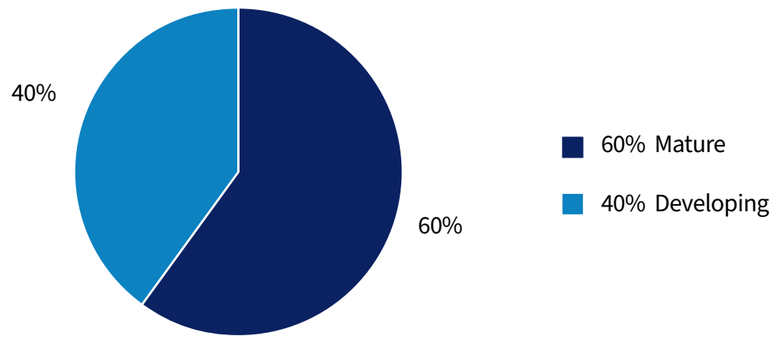
Q46. Describe the scope of your organization's data dictionary.



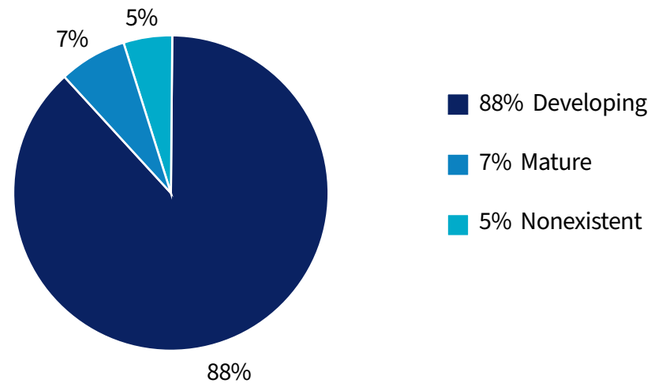
CHARTS

DATA GOVERNANCE

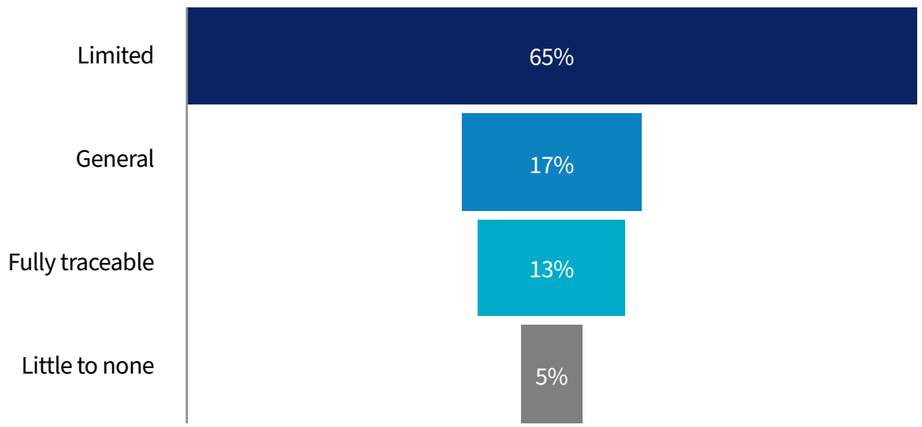
Q47. Describe the state of your organization's formal process to maintain and update the data dictionary.



Q48. To what degree has your organization adopted data management standards?



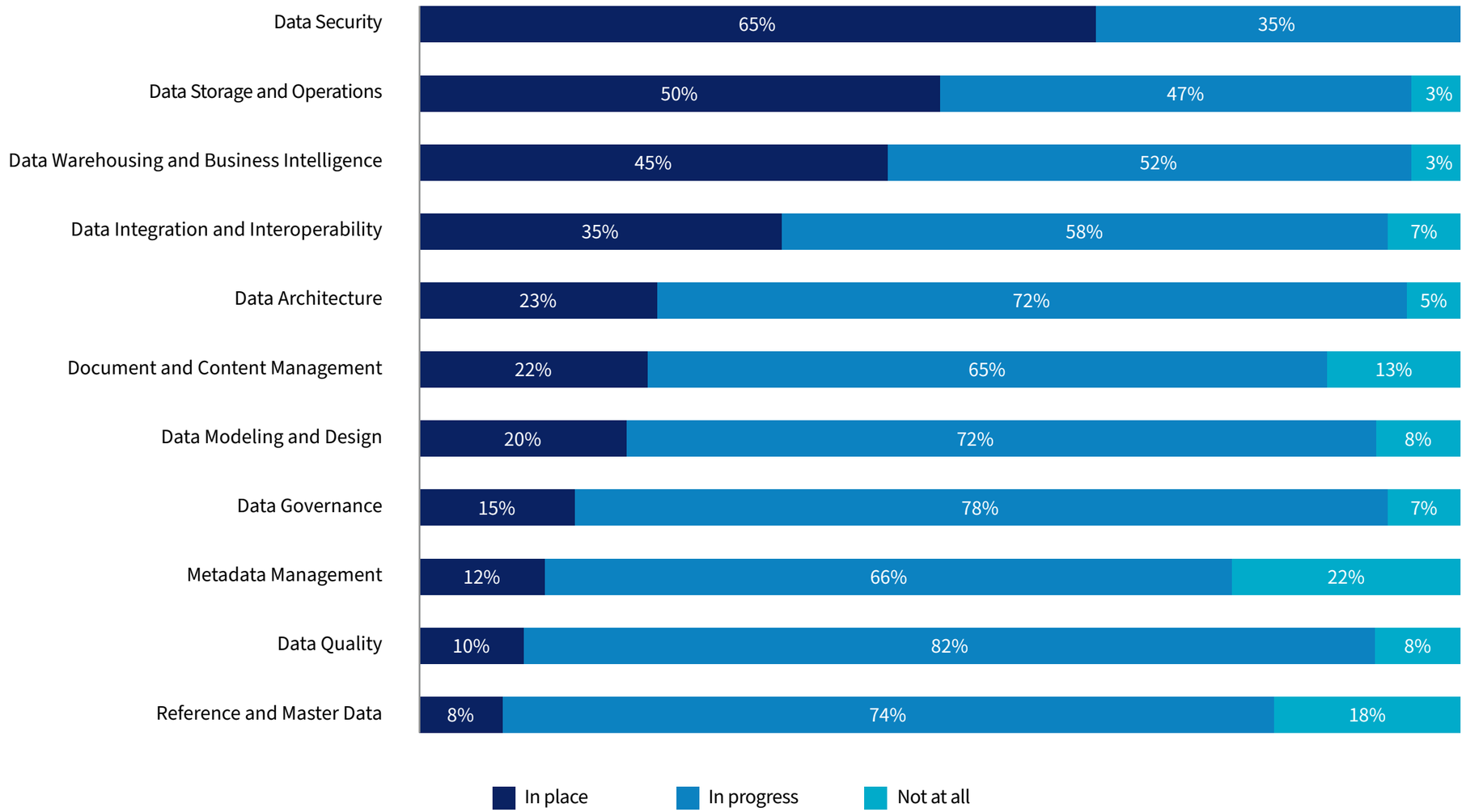
Q49. Describe your organization's ability to trace the data used in analytics products back to the original source?



CHARTS

DATA GOVERNANCE

Q50. Indicate your organization's progress toward enterprise-level implementation of the data management components as defined by Data Management Association (DAMA).



CHARTS

ANALYTICS CAPABILITIES

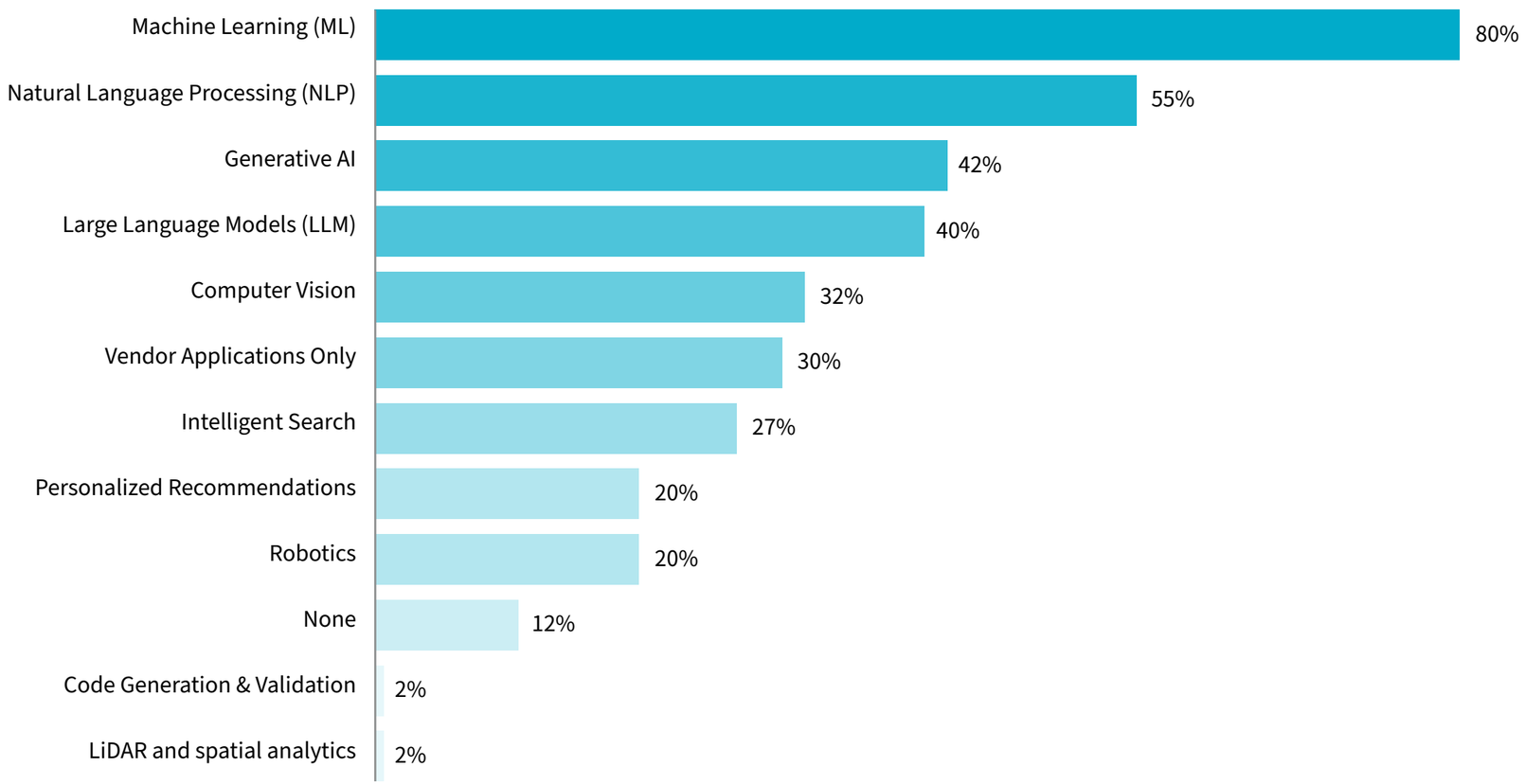
Q53-Q61. Which of the following analytics capabilities does your organization currently utilize for each functional group?

CAPABILITY	CORPORATE	CUSTOMER OPERATIONS	FINANCE	INFORMATION SYSTEMS	INFRASTRUCTURE	LEGAL	MARKET OPERATIONS	SUPPLY CHAIN	WORKFORCE OPERATIONS
REPORTING	92%	90%	97%	95%	97%	75%	82%	88%	88%
BUSINESS INTELLIGENCE	80%	80%	78%	82%	80%	32%	65%	72%	78%
ANALYSIS	80%	82%	83%	70%	80%	27%	67%	68%	73%
FORECASTING	45%	48%	68%	38%	65%	7%	58%	52%	42%
OPTIMIZING	17%	25%	27%	23%	38%	3%	38%	15%	18%
AUTOMATION	25%	30%	23%	35%	28%	5%	18%	18%	23%
NOT APPLICABLE	5%	10%	2%	3%	3%	25%	18%	12%	12%

CHARTS

ANALYTICS CAPABILITIES

Q62. Indicate which fields of artificial intelligence (AI) your organization currently has in production.

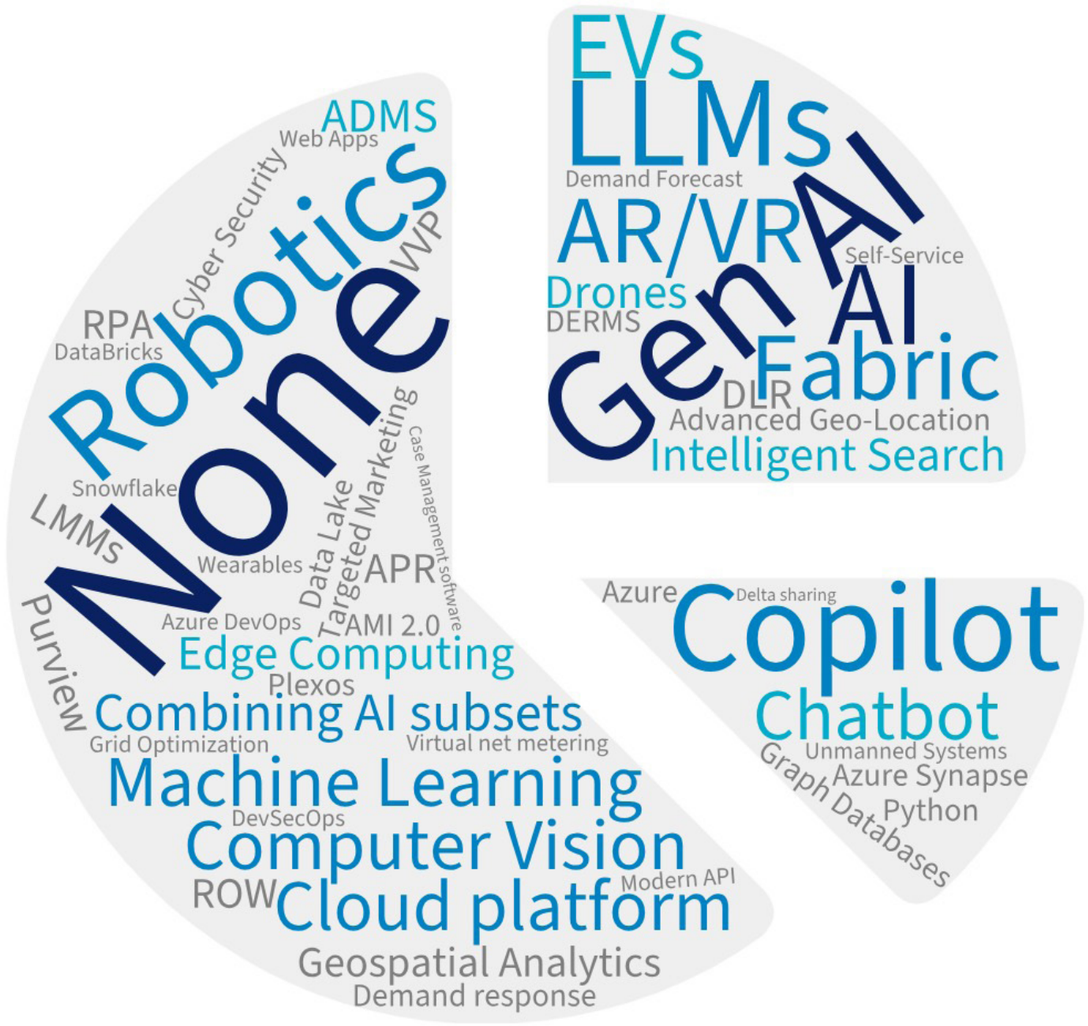


ADVANCE TO TOPICS

CHARTS

ANALYTICS CAPABILITIES

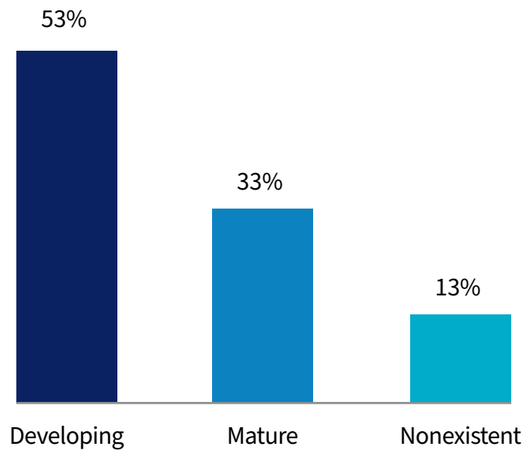
Q63. What other emerging technologies is your organization exploring?



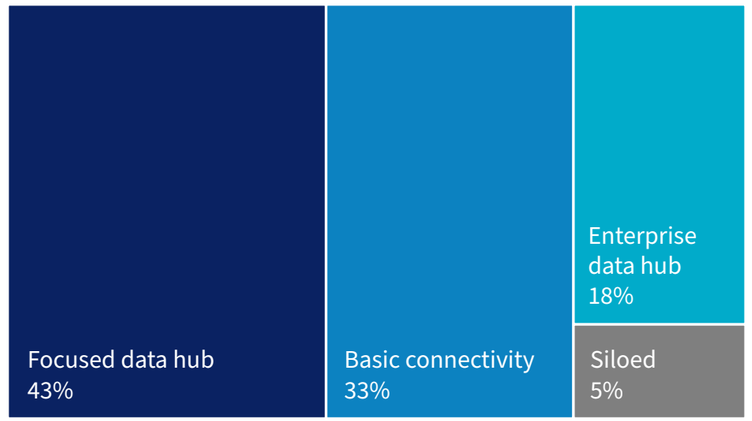
CHARTS

TECHNOLOGY & TOOLS

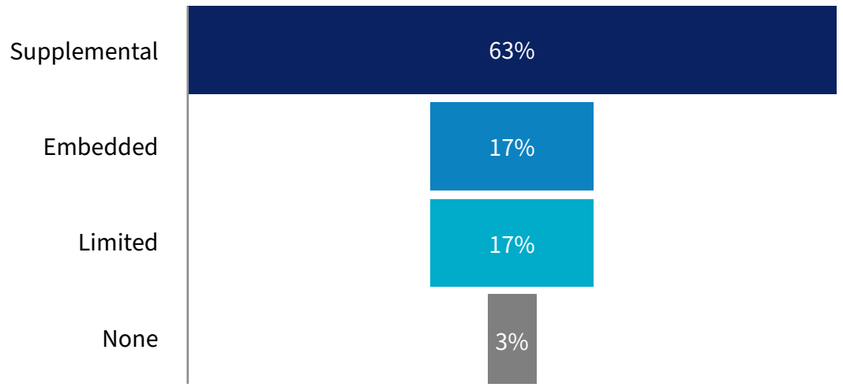
Q64. Does your utility have an enterprise analytics architecture currently in place?



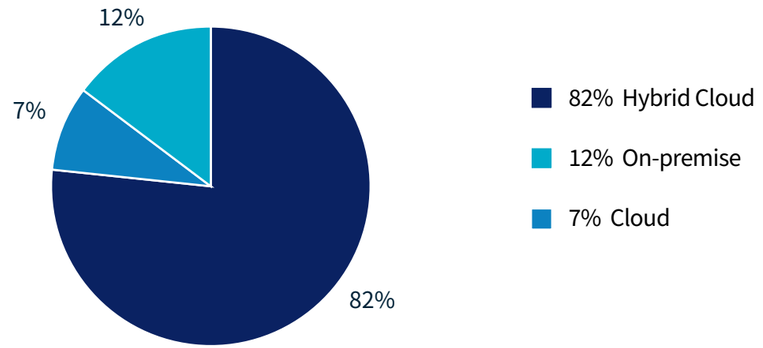
Q65. To what extent is your organization integrating information from various sources across the organization?



Q66. To what extent does your organization leverage external data sources?



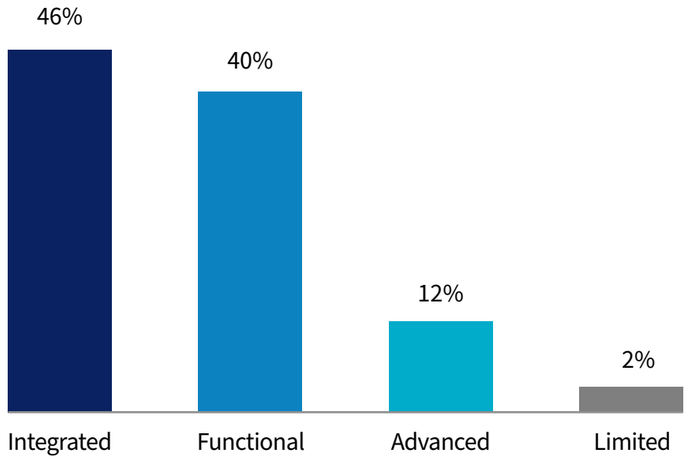
Q67. What is the hosting environment for your organization's data storage and analytics toolset, including data management?



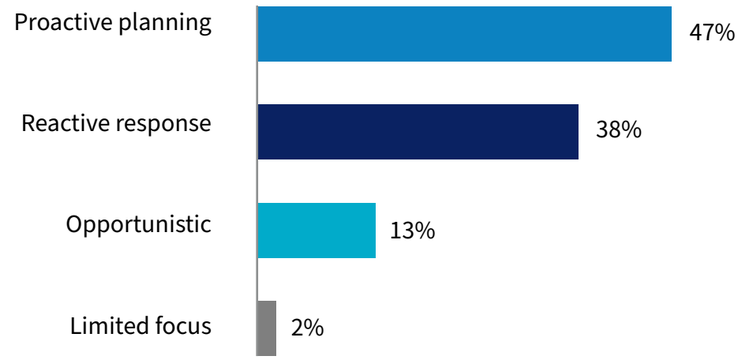
CHARTS

TECHNOLOGY & TOOLS

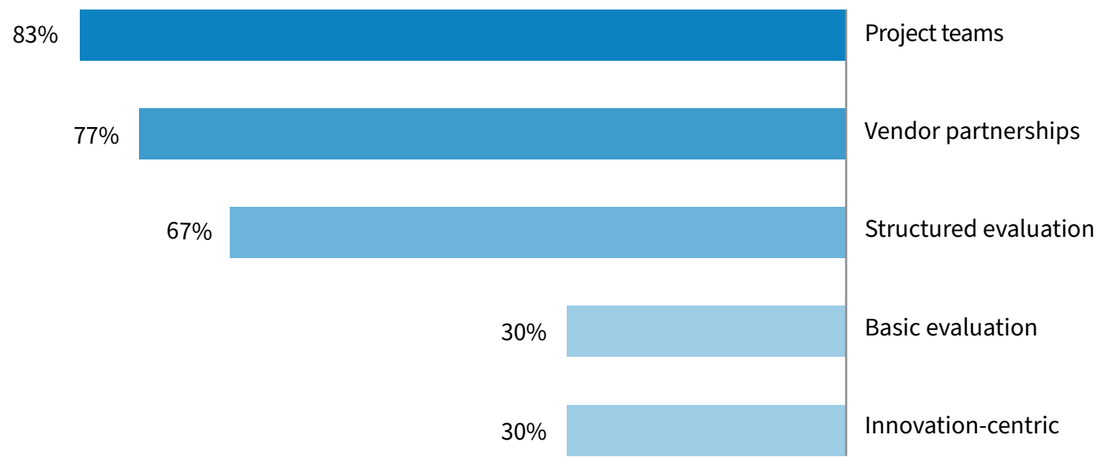
Q68. Describe your organization's current analytics technology and toolset.



Q69. How does your utility assess the need for updates or changes to your analytics toolset?



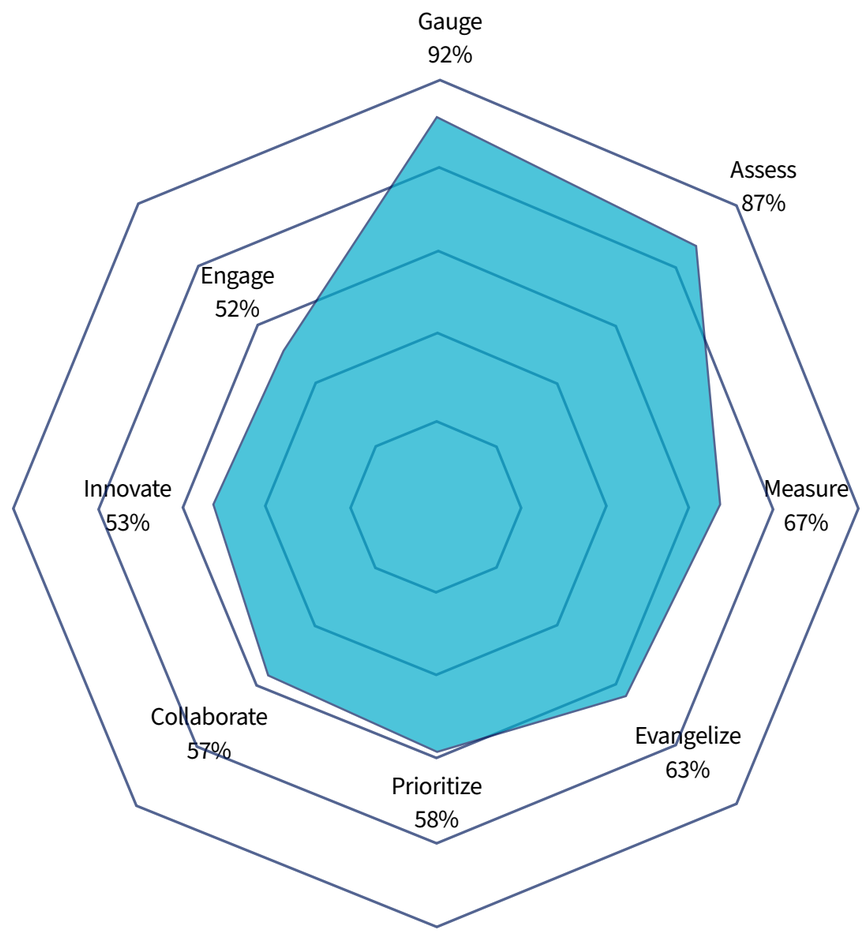
Q70. Which processes does your organization utilize to evaluate and select analytics technologies and toolsets?



CHARTS

INSIGHTS

Q71. How will your organization utilize this survey and resulting analysis?



Other:
- Drive improved data governance
- Learn how others view themselves

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