



## Beyond the Backlog Gaining Clarity with WHY

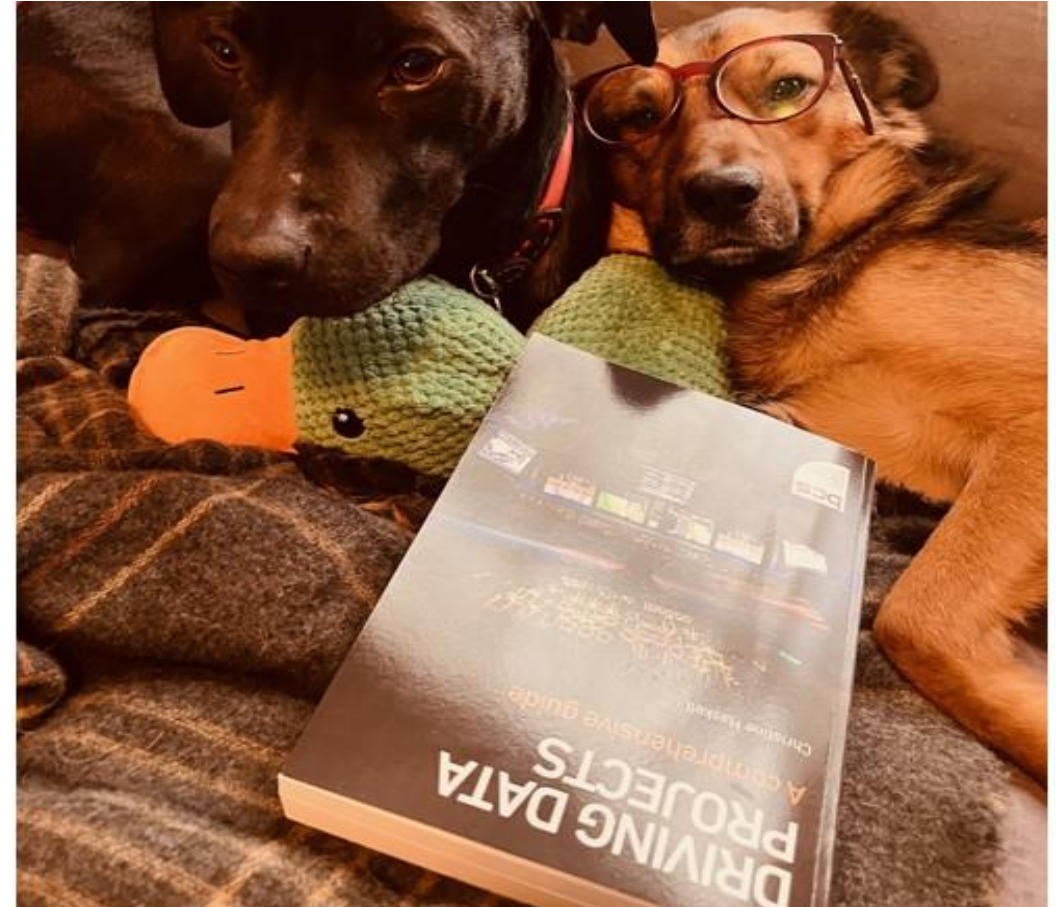
Christine Haskell, Ph.D.

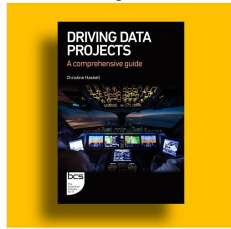
**Waterfall question:**  
Where are you joining  
us from today?

SEPT 2024 | 1 HOUR

## 👋 Why I'm here

- 25+ years in technology—delivery and leadership roles—from start ups to late-stage organizations;
- 8 years leadership consulting and executive coaching experience
- Led multiple business intelligence initiatives from strategic planning to governance
- 8 years teaching graduate courses in EMBA and information management programs
- I'm certified in PMP, Prosci, IFC/PCC
- M.A. Applied Behavioral Science  
Ph.D. Organizational Systems & Sustainability
- The dogs' names are Bean (the spicy kind) and Booker (yes, after the bourbon).





## Beyond the Backlog

Gaining Clarity  
with  
WHY


### Setting the Stage

- Level-Set and Point of View
- How I Help / What I Do

### What We'll Cover

- Leadership in Context
- Tools & Methods in context
- The WHY paradox
- 3 Methods
  
- Wrap Up

# Setting The Stage



Existing, analog businesses are used to thinking of digital information technology (IT) as a utility—something that enables their business to be faster, better, or cheaper.



We need to start thinking of digital as a *capability* that's not in just one department but across the *entire organization*.

A photograph of a beach littered with numerous discarded plastic water bottles. The bottles are scattered across the sand, some lying on their sides and others partially buried. The background shows the ocean and a cloudy sky. The overall tone is somber and environmental.

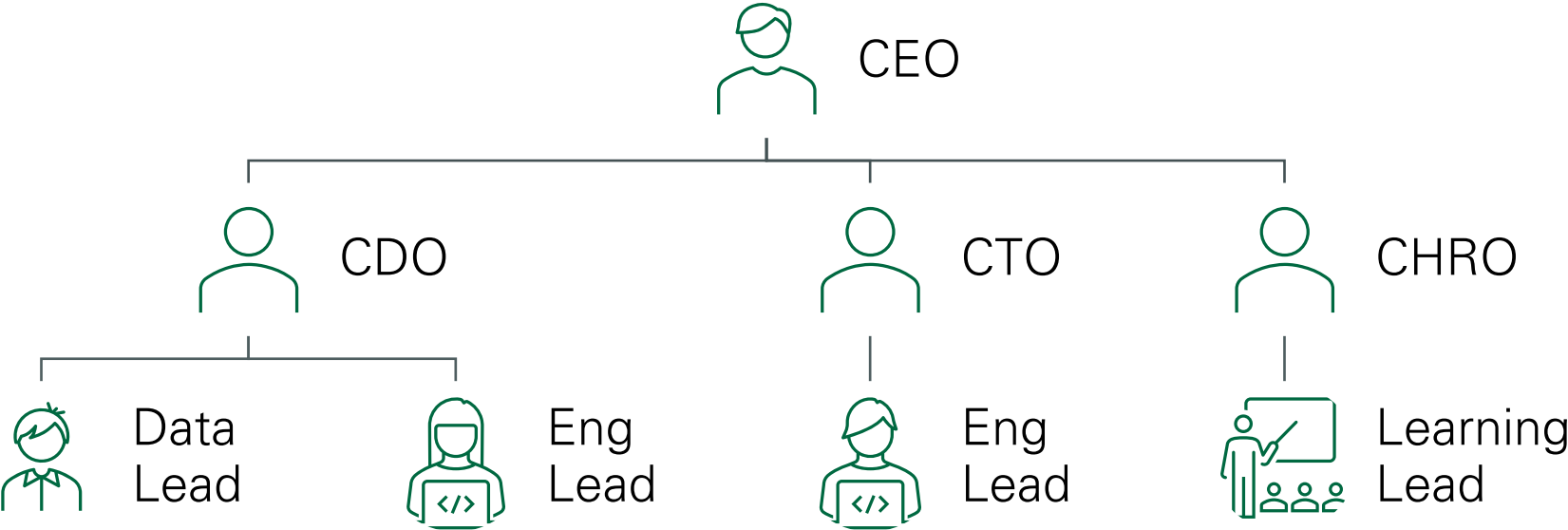
***“Data is like garbage. You’d better know what you are going to do with it before you collect it.”***

**Mark Twain**

# Leadership Dynamic

## In context

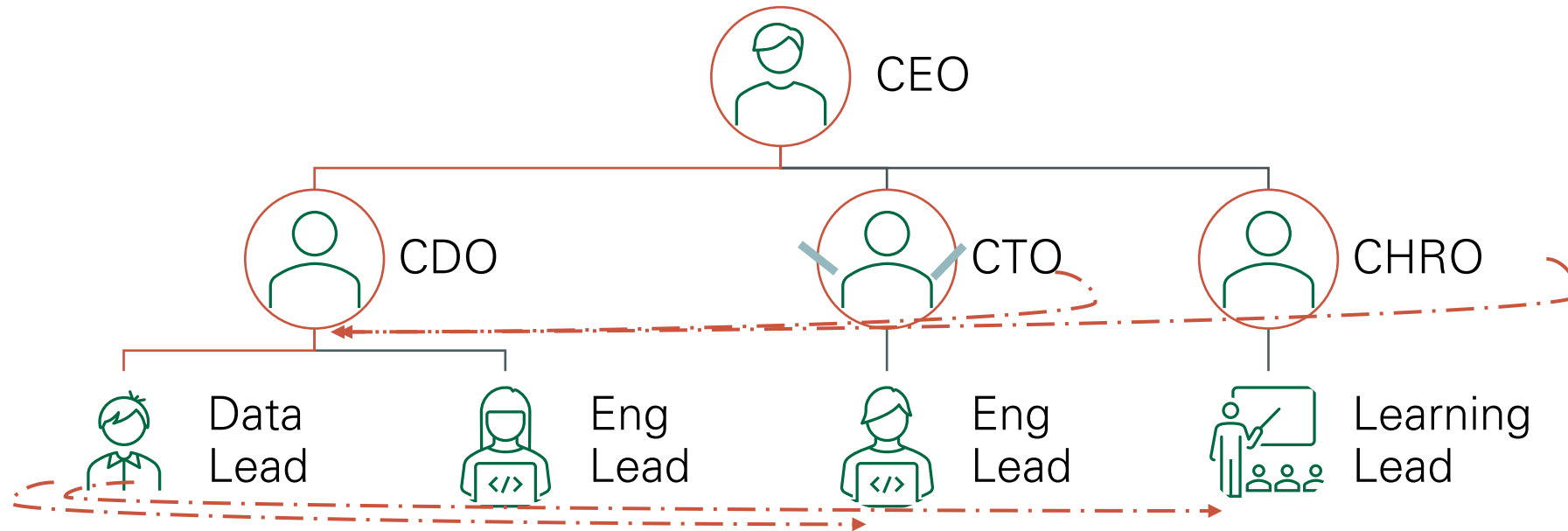
How does understanding and speaking data change the dynamic of leadership?



# Leadership Dynamic

## In context

How does ineffective sponsor impact data project success?





# Challenge / Opportunity

## In context

If all technology projects are data projects...

From Current State	To Future State
Lack of understanding how language from day-to-day report requests impacts technical debt	<i>Opportunity to enhance organizational efficiency:</i> By educating business stakeholders on how everyday report requests impact technical debt, data teams can streamline processes and significantly reduce long-term costs.
Unclear activities within the data supply chain	<i>Opportunity to improve data quality and accountability:</i> Clarifying roles and responsibilities within the data supply chain will lead to more accurate, reliable data and foster a culture of shared ownership.
Lack of project and change management rigor for data services	<i>Opportunity to ensure long-term success of data initiatives:</i> Implementing robust project and change management practices for data services will drive sustained value, enabling the organization to fully leverage its data assets over time.

**The good news?** Organizations are never starting from nothing; everyone is trying to find a path forward.

## Tools and Methods in context

The adoption and use of data tools and methodologies are not culturally neutral.









(Observations)	(Data)	(Model)	
A BIASED WORLD	DATA GENERATION	LEARNING	EVALUATION
Historical Bias: <ul style="list-style-type: none"><li>• <i>Co-occurrence bias</i></li><li>• Framing bias</li><li>• Language bias</li><li>• Coverage bias</li></ul>	<ul style="list-style-type: none"><li>• <i>Specification bias</i></li><li>• Annotation bias</li><li>• Measurement bias</li><li>• Sampling bias</li></ul>	<ul style="list-style-type: none"><li>• <i>Hyper-parameter bias</i></li><li>• Inductive bias</li><li>• Uncertainty bias</li></ul>	<i>Model bias</i> <ul style="list-style-type: none"><li>• Overall misclassification bias:</li><li>• False +/- rate</li><li>• Equalization odds</li><li>• Calibration</li></ul>

Conway, M. E. (1968). How do committees invent? *Datamation*, 14(4), 28-31.

# Does it Still Sound Simple?

## Examples of Tools in Context

For examples of how cultural biases influence tool selection and methodology implementation – we only need to look in our own organizations.

Organizational Value	Culture 1	Culture 2
“run fast and break things”		
“bias toward action”		
“don’t do evil”		
“think like owners”		

## Leadership, Tools, and Methods in Context

The role of psychological safety in fostering a questioning culture.

- Asking "why" requires more than just curiosity—it needs executive support  
→ C- Suite must design a culture with intention not by checkbox
- Skills for effective questioning are often undervalued in traditional hierarchies  
→ Leaders must embody *and model* effective sponsorship skills
- Performance management systems (which are tools within organizational systems) may inadvertently discourage deep questioning  
→ “Every system is perfectly designed to produce the results it is producing.” – E. Deming

## Challenges of the Status Quo

1. **Time Pressure:** All methods require time for thoughtful analysis, which can be challenging in fast-paced environments.
2. **Cultural Barriers:** Organizational culture may resist deeper questioning or strategic thinking regardless of the method.
3. **Short-Term Focus:** All three methods aim for long-term, strategic solutions, which can conflict with short-term priorities.
4. **Lack of Training:** Effective use of any of these methods requires some level of training and practice.
5. **Leadership Support:** Without top-down support, any strategic method is likely to be underutilized.



## 5 Whys

- Helps identify the root cause of problems
- Example application in data quality issue



## Golden Circle

- Aligns data initiatives with organizational purpose
- Enhances buy-in from stakeholders



## Human-Centered Design (HCD)

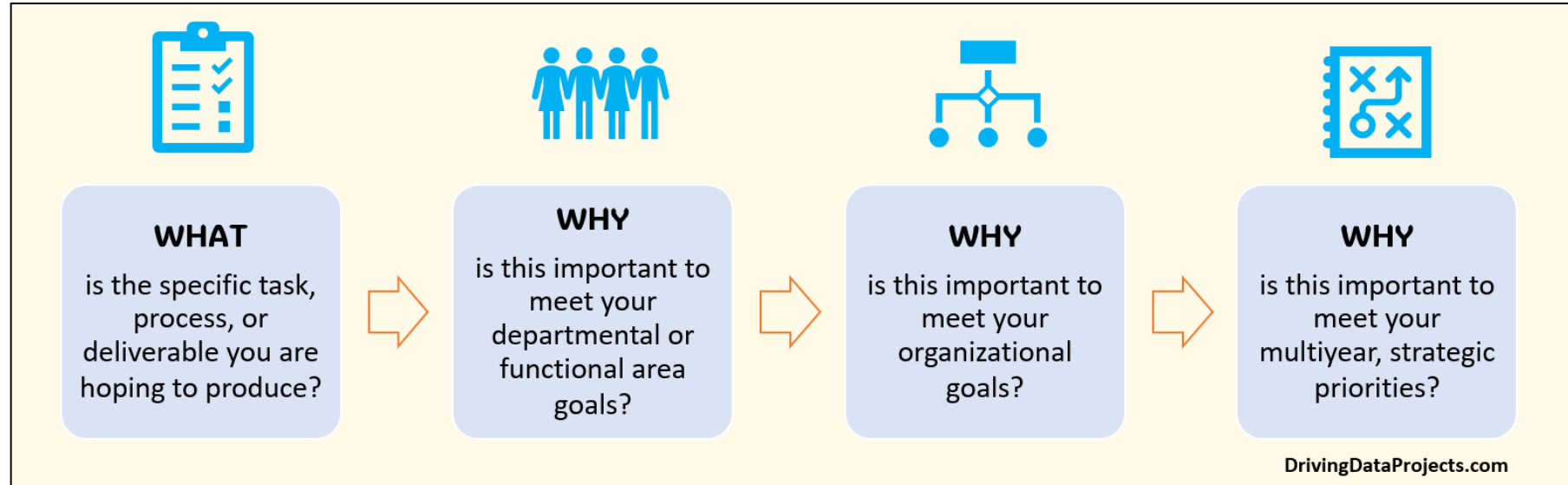
- Applies design thinking to data problems
- Encourages asking "why" from multiple perspectives

# Method 1: The 5 Whys

## What Is It?



### 5 Whys



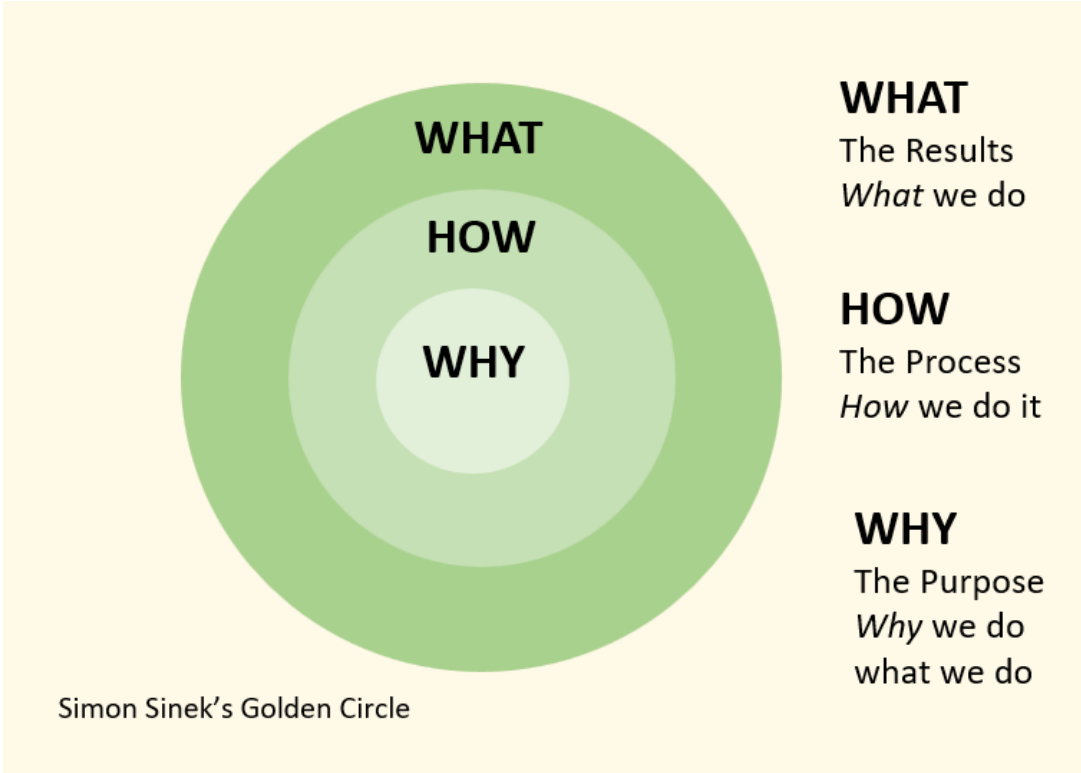
The 5 Whys is an iterative problem-solving method that aims to identify the root cause of an issue by repeatedly asking "Why?" (typically, five times). It helps to dig beneath the surface of a problem to find the underlying cause, rather than just addressing symptoms.

# Method 2: The Golden Circle

## What Is It?



Golden Circle



The Golden Circle is a concept that prioritizes the "Why" (purpose) before the "How" (process) and "What" (actions) in organizational strategy and communication. It emphasizes starting with the core purpose to inspire action and drive decision-making at all levels of an organization.



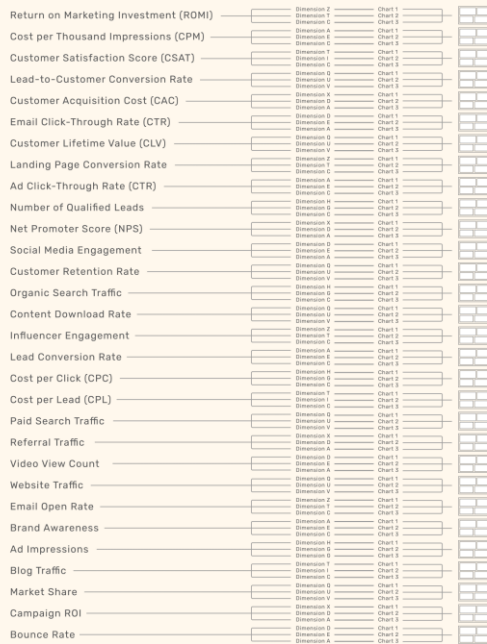
# Method 3: Human-Centered Design

## What Is It?



HCD

From these **30 KPIs** we could create **90 charts** arranged in **30 dashboards**



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1. Receive initial request (e.g., " a customer behavior report") turns into "I want a dashboard for all my KPIs")
2. Resist immediate agreement to the request
3. Probe for underlying strategy, priorities, and problems
4. Understand the user's environment and intended dashboard use
5. Assess data complexity and business rules
6. Guide stakeholder to articulate specific needs (e.g., "As a [role], I want to [action] so that [benefit]")
7. Identify core KPIs based on articulated needs
8. Design focused dashboard addressing core needs
9. Iterate based on user feedback

Aurélien Vautier

Author of *The Dashboard Assessment*, Newsletter "Dataviz Clarity Newsletter"



### HCD

#### Common Scenario

Marketing Director requests a “comprehensive customer behavior report” for an upcoming strategy meeting, and there’s scope creep.

Some new challenges

#### Challenges for Data Team

- *Overwhelming number of KPIs*
- Lack of context for the request
- No clear connection to overall business strategy
- Unclear priorities or specific metrics needed
- *Potential for data overload*
- Potential misalignment with existing data structures

Same issues

#### Key Point

Ad hoc requests often leave data teams flying blind, unable to leverage their full potential to support business goals.

# 3: Human-Centered Design

## Santa's List: In Action



HCD



Return on Marketing Investment (ROMI)  
Cost per Thousand Impressions (CPM)  
Customer Satisfaction Score (CSAT)  
Lead-to-Customer Conversion Rate  
Customer Acquisition Cost (CAC)  
Email Click-Through Rate (CTR)  
Customer Lifetime Value (CLV)  
Landing Page Conversion Rate  
Ad Click-Through Rate (CTR)  
Number of Qualified Leads  
Net Promoter Score (NPS)  
Social Media Engagement  
Customer Retention Rate  
Organic Search Traffic  
Content Download Rate  
Influencer Engagement  
Lead Conversion Rate  
Cost per Click (CPC)  
Cost per Lead (CPL)  
Paid Search Traffic  
Referral Traffic  
Video View Count  
Website Traffic  
Email Open Rate  
Brand Awareness  
Ad Impressions  
Market Share  
Campaign ROI  
Blog Traffic  
Bounce Rate

**WHY:** Ensure timely follow-ups and maximize conversions

Lost Opportunity: Focusing on KPI quantity instead of strategic goals

**HOW:** Track lead response times and conversion rates

Lost Opportunity: Missing chance to develop targeted metrics for sales process optimization

**WHAT:** Dashboard with core KPIs (landing page conversion rate, lead conversion rate, response time, email open rates)

Lost Opportunity: Creating an overwhelming dashboard instead of an actionable tool

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## Implications of Disconnected Requests

HCD

- 1. Cognitive Overload**
  - Too many KPIs lead to difficulty in decision-making
  - Important insights may be lost in the noise
- 2. Resource Inefficiency**
  - Time spent on creating charts for low-value KPIs
  - Maintenance burden for extensive dashboards
- 3. Misaligned Priorities**
  - Focus on quantity over quality of insights
  - May not address core business needs
- 4. Poor User Experience**
  - Difficulty in navigation and interpretation
  - Low adoption rates due to complexity
- 5. Missed Strategic Opportunities**
  - Failure to understand underlying business challenges
  - Lost chance to provide targeted, high-impact insights

# 3: Human-Centered Design

## Focused Request



HCD

### The trick

As a *Sales Director*

I would like to :

*track lead*

*response times*

So I could

*ensure timely*

*follow-ups and*

*maximize conversions.*



Return on Marketing Investment (ROMI)  
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Ad Click-Through Rate (CTR)  
Number of Qualified Leads  
Net Promoter Score (NPS)  
Social Media Engagement  
Customer Retention Rate  
Organic Search Traffic  
Content Download Rate  
Influencer Engagement  
**Lead Conversion Rate**  
Cost per Click (CPC)  
Cost per Lead (CPL)  
Paid Search Traffic  
Referral Traffic  
Video View Count  
**Response time**  
Website Traffic  
**Email Open Rate**  
Brand Awareness  
Ad Impressions  
Blog Traffic  
Market Share  
Campaign ROI  
Bounce Rate

### This makes it easier to:

- Customize the dashboard according to user preferences
- Gain a better understanding of their challenges
- Enhance the user experience
- Reduce cognitive overload
- Minimize filter overload
- Avoid data overload

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## Lost Opportunities = Lost Value

### HCD

#### 1. Relevance

- % of dashboard KPIs directly tied to strategic goals
- Usage frequency of each KPI

#### 2. Actionability

- % of KPIs with clear associated actions
- Time from insight to action

#### 3. Clarity

- User comprehension score for dashboard
- Time spent interpreting dashboard vs. taking action

#### 4. Timeliness

- Data refresh rate aligned with decision-making needs
- Lag time between data update and dashboard refresh

#### Key Takeaway

By addressing these data quality measures, organizations can transform lost opportunities into tangible improvements in their data strategy, directly supporting business objectives.

# 3 Methods Summary

## Unique Aspects



### 5 Whys

- **Unique Aspect:** Systematic deep-dive into root causes
- **Learning:** Reveals underlying issues behind surface-level requests



### Golden Circle

- **Unique Aspect:** Aligns data initiatives with purpose and process
- **Learning:** Emphasizes the importance of 'why' in data projects



### Human-Centered Design (HCD)

- **Unique Aspect:** Transforms broad requests into focused solutions
- **Learning:** Highlights the value of user-centric, targeted dashboards

## Method-Comparison Table

Aspect	5 Whys	Golden Circle	Human Centered Design
Key Characteristic	Iterative questioning to uncover root causes	Focuses on purpose (Why), then process (How), then actions (What)	Transforms broad requests into focused solutions
Complexity	Appears simple, requires skill to execute effectively	More complex, requires big-picture thinking	Varies based on request and stakeholder involvement
Scope of Change	Specific, targeted changes	Fundamental organizational shifts	Project-specific refinements
Unique Challenge	Risk of narrow focus, missing systemic issues	Abstract nature can be difficult to grasp and articulate	Balancing stakeholder expectations with strategic needs
Best Used When	Addressing specific, recurring problems	Defining or refining organizational strategy	Dealing with vague or overly broad stakeholder requests
Skill Set Required	Analytical thinking and problem-solving	Strategic thinking and communication	Interpersonal skills and requirement analysis expertise
Potential Pitfall	Can be perceived as confrontational	May lead to significant, potentially disruptive changes	Stakeholders may resist refining their initial requests
Implementation Tip	Start with clear, well-defined problems	Ensure alignment across all organizational levels	Begin with thorough stakeholder interviews to understand true needs



## Key Takeaways

- The 5 Whys help uncover true needs behind requests
- The Golden Circle ensures alignment with strategic goals
- The HCD Approach emphasizes the importance of focus and user-centricity
- All methods stress the importance of looking beyond the initial request
- Combining these approaches can lead to more strategic, impactful data initiatives

# What Can YOU Do Today?

## Cultivating a “Why” Culture

1. **Implement "Question Time" in meetings** (if we don't schedule the time, it won't get done – remember nothing is culturally neutral. We must understand how we enable these patterns to break them.)
2. **Reward and recognize insightful questions** (with behavioral specificity, help make connections with what the question is trying to draw out, etc.)
3. **Provide training on effective questioning techniques** (look into these methods and learn more about them, earn certifications, buy *Driving Data Projects!*, etc.)
4. **Lead by example** - leaders should openly ask "why" (people learn most by watching others, modeling is key)

# Action Steps for Data Leaders

## Cultivating a “Why” Culture

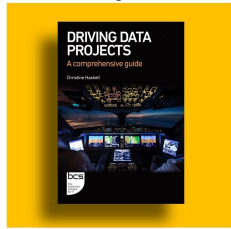
Data transformations are referred to as journeys because they are hard. These efforts require consistent effort, clear communication, and an *ongoing* willingness to challenge the status quo.

- 1. Advocate for proper executive sponsorship**
  - Develop a sponsorship roadmap
  - Identify and nurture potential sponsors
- 2. Develop and communicate a clear data strategy**
  - Align with business objectives
  - Create a compelling data vision in support
- 3. Foster a culture of curiosity and continuous learning**
  - Implement learning programs
  - Encourage experimentation
- 4. Implement cross-functional data literacy programs**
  - Tailor programs to different roles
  - Use real business problems in training
- 5. Align data initiatives with business objectives**
  - Regular strategy alignment sessions
  - Develop data-driven KPIs

# Deliverables for Breaking Silos

## Strategies for Cross-Functional Data Collaboration

Strategy Element to Develop	Description	Potential Impact
Data Mesh	Decentralized data ownership	Empowers departments, increases data quality
Cross-functional Data Teams	Diverse teams for data projects	Brings multiple perspectives, reduces blind spots
Executive Data Workshops	Regular data sessions for C-suite	Aligns leadership, drives data-driven culture from top
Data Storytelling Training	Teaching data communication skills	Improves data-driven decision-making across org



## Beyond the Backlog

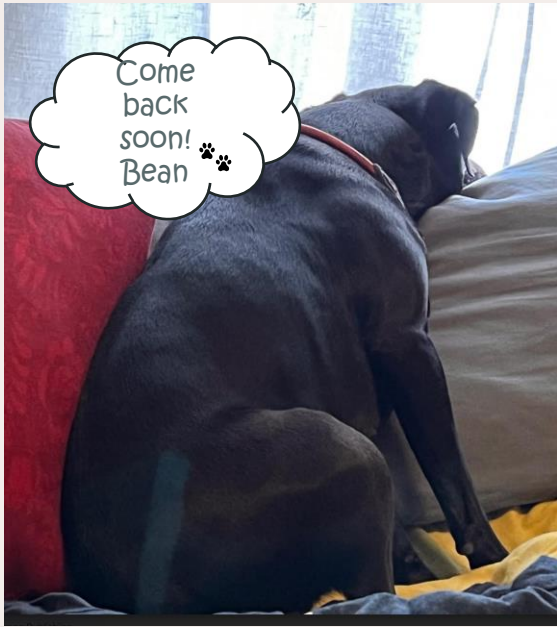
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Watch for the  
follow-up email!

Webinar replay (link)

Book a [30 -minute introductory call](#) to explore how Christine can help you navigate your data projects needs, increase your leadership effectiveness with sponsors and stakeholders – and everything in-between!

Thank you!

For more information:  
[www.christinehaskell.com](http://www.christinehaskell.com)

