



The UC Information Center

How We Did It

INSTITUTIONAL RESEARCH & ACADEMIC PLANNING (IRAP)

UNIVERSITY OF CALIFORNIA

OFFICE OF THE PRESIDENT

2015 CAIR CONFERENCE



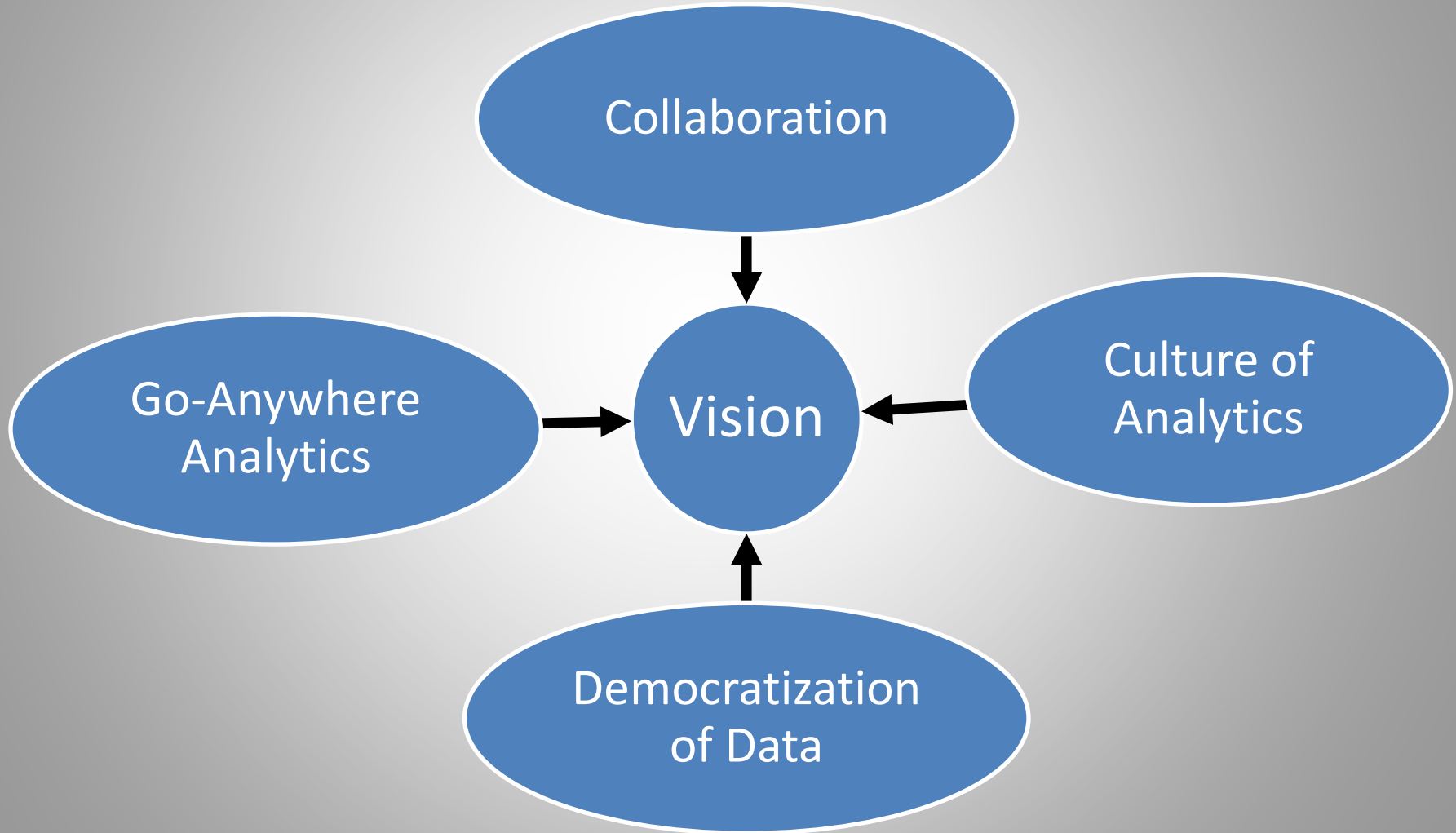
Introduction



- Planned Outcome
- A Little History
- The Need
- Our Vision
- Our Goals
- Life Before Visual Analytics

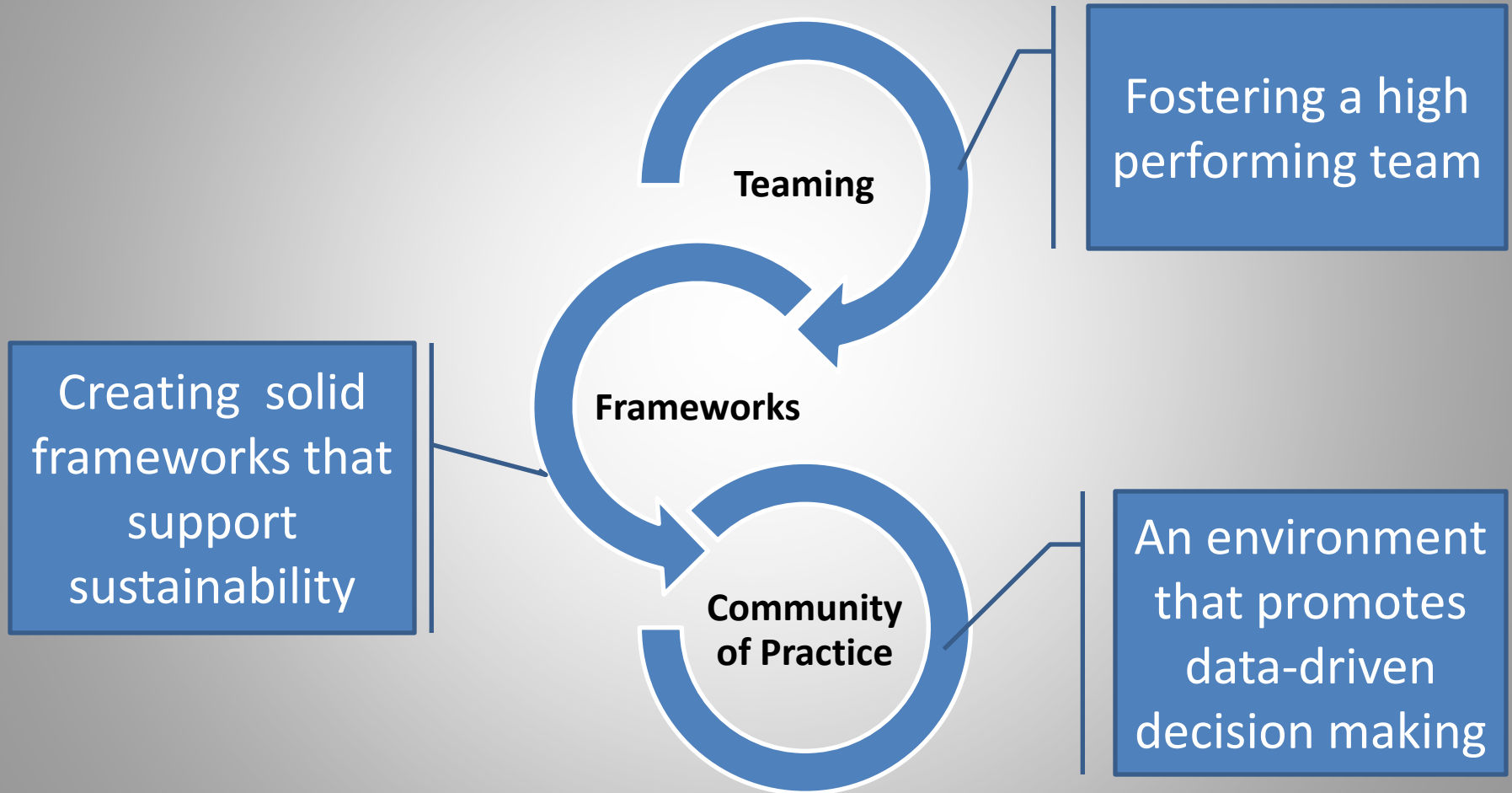


Vision





Goals





Five Key Needs

1

Quick & Easy
Access

2

Prompt
Availability

3

Centralized
Data

4

Demonstrate
Performance

5

Accountability
&
Transparency



Life Before Analytics

- Excel spreadsheets
- Struggle with large volumes of data.
- Slow and gut-driven decision making.
- Delay from data to useful analytics
- Low productivity
- Impaired enablement



Why Use Data Visualizations?

- Presentation of large amounts of data
- Opportunities to glean new insights.
- Ability to discern data relationships.





Employed Software

- Tableau Desktop Professional
- Tableau Server
- Drupal CMS





Data Platform



- Development Approach
- Development Phases
- Data Infrastructure



Development Approach

- Data Mart development.
- Development collaboration with other UCOP units
- Content collaboration with other UC offices

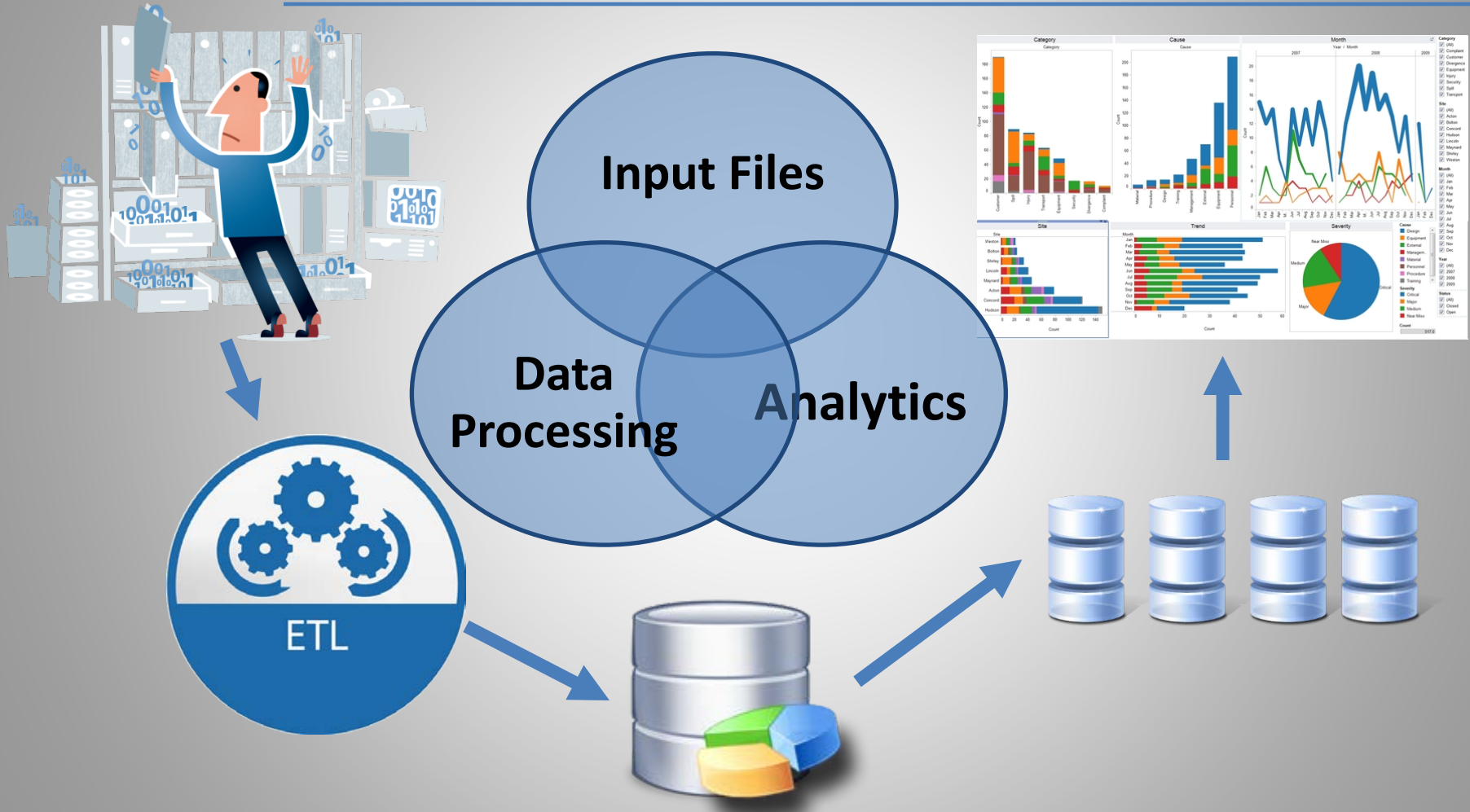


Development Phases

- Project initiation – **8/1/2014**
- Beta site development and deployment
12/19/2014
- Production site go-live – **3/31/2015**



Data Infrastructure





Project Management



- Project Team
- Key Roles
 - Project Sponsor
 - Project Manager
 - Tableau Developers



Project Team

Business Team

- Project Sponsor
- Project Lead
- Systems Analyst
 - Tableau Developers
 - Graphic Designer

Technical Team

- BI Manager
- Data Architects
- ETL Developers
 - ETL Lead
 - ETL Manager

Communications

- Web Developer
- UX Designer
- Content Editor



Key Role – Project Sponsor

- One sponsor – VP IRAP Pamela Brown
- Benefits
 - Full support of key stakeholders
 - Clearly communicated vision
 - Quick and efficient decision making
 - Politics and issue management
 - FERPA Regulations
 - Champions the project



Key Role – Project Manager

- One Project Manager – Me!
- Pros
 - Direct access to Project Sponsor
 - Total control – planning, estimating, scheduling and tracking
 - Analyst, Lead, Project Manager, Content Manager
- Cons
 - Multi-tasking – Project Management (P/T)
 - Often labelled as follows:
 - ✓ “The big bad wolf”
 - ✓ “The lady with the crowbar”



Key Role – Tableau Developers

- *Five Core Developers and One Graphic Designer*
 - Who really wants to be a part of the team?
 - Focusing on the champions
 - Providing support
 - Creating an atmosphere for collaboration
 - Coaching, encouraging and motivating



Lessons Learned



- Strategies That Worked
- Strategies That Didn't Work
- Challenges We Faced



Strategies that worked...

- Project management - focus on leadership and people skills
- Clear objectives – ongoing reminders!
- Good organization skills
- Identifying and celebrating each milestone
- Frequent core group meetings
- Sponsor engagement throughout the process

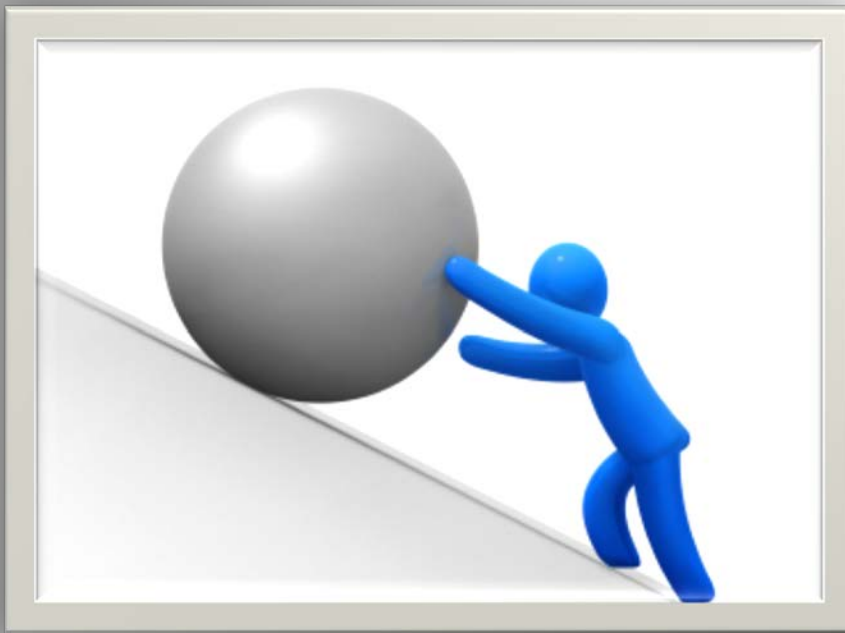


Strategies that didn't work...

- Rigid singular operational style guide.
- Using ad-hoc data files.
- Avoiding a robust testing and validation methodology.
- Managing a cross-functional team in the same way as a functional team.



Challenges



Cross-functional
team

management -
One plan; three
teams



Branding and
creativity conflict



One vision;
multiple ideas



Other Critical Success Factors



- Collaborating for Success
- Motivate, Motivate, Motivate
- Feedback Process
- What Next?



Collaboration Means Success



- Collaboration with other key units within UCOP and UC campuses:
 - To avoid multiple inconsistent views of the same data.
 - To avoid sporadic development of data sharing websites.



Motivate, Motivate, Motivate



- Clear vision
- Communicate!
- Coach and encourage
- Provide the right tools
- Focus on crucial contributors
- Be firm about deadlines
- Make project exciting!



Feedback Process



- Email address created for feedback.
- Defined timeline for feedback.
- Action on feedback received.



What Next?



- Ongoing updates based on continuous feedback
- Three planned releases per year
 - July 15
 - Dec 15
 - March 15
- Implementation of Tableau Server for enhanced security
- Integration of D3.js with Tableau



Leave You With This...

“Once you start spending money, the data becomes even more important. The culture we’re growing is data hungry, and the best idea driven by the best data wins.” —
Head of analytics for an insurance company

Data is the new bacon!



Questions





Thank You for Coming!



- Questions and Comments
 - Ola.Popoola@ucop.edu
 - Ryan.Chan@ucop.edu
 - Darin.Jensen@ucop.edu
 - irap@ucop.edu