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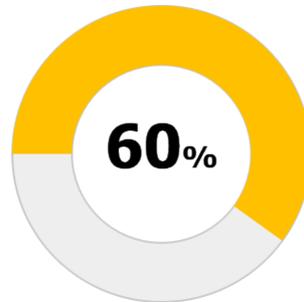**Shawn Helwig**

Data Quality Assessment for Business Users

Wednesday, March 11, 2026

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Summary: Overall Results

Your Overall Score is:
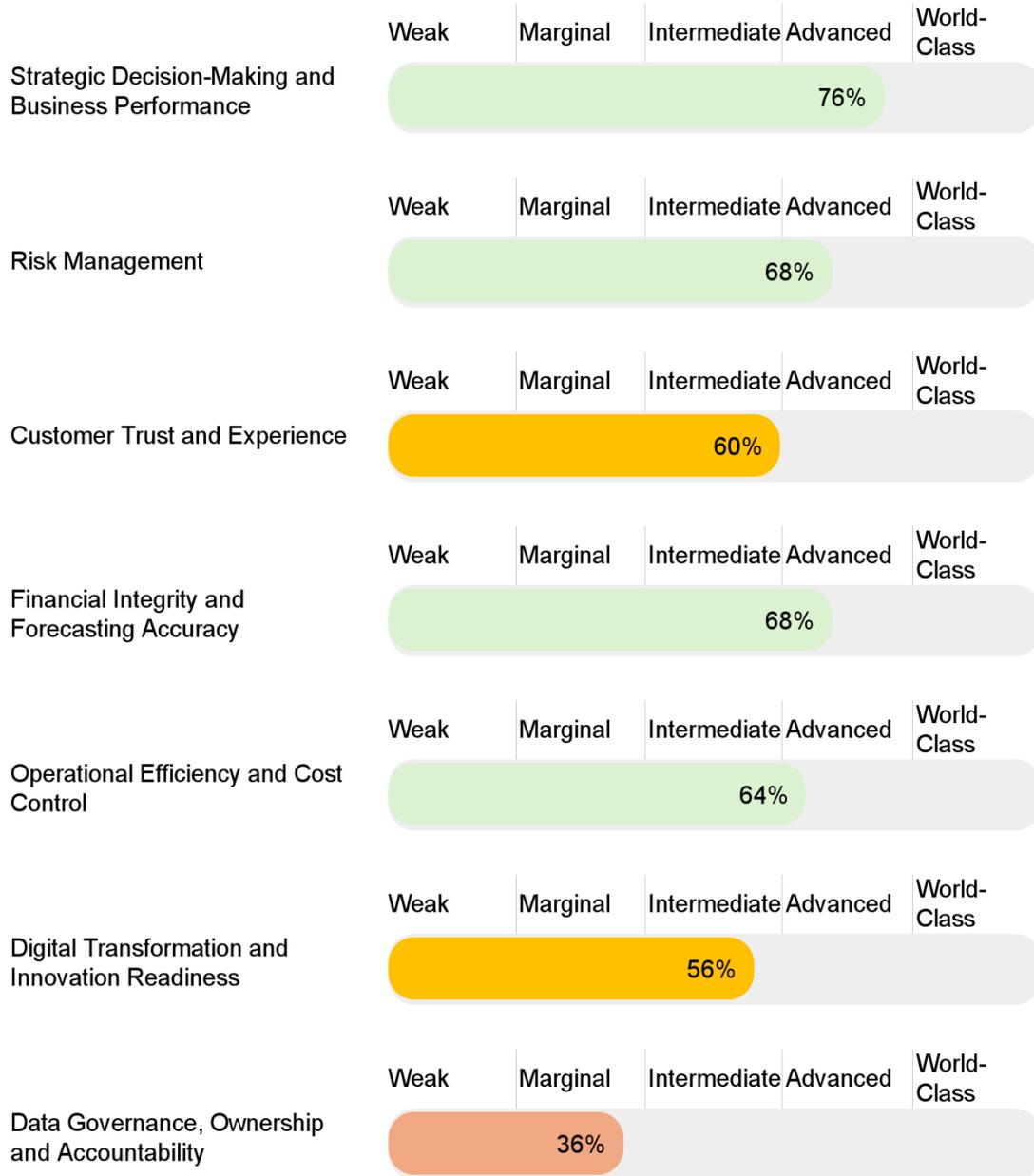

60%

Your Company Rating is: <u>Intermediate</u>

<u>Overall Assessment Findings:</u>

Core data processes appear to be reasonably formalized with data quality generally improving and supported by emerging governance practices. There are also signs that data quality is being aligned with business goals and outcomes. Consequently, data is starting to be trusted in some areas, enabling better decisions and early-stage digital use.

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Competency   ## Results

Strategic Decision-Making and Business Performance

Weak	Marginal	Intermediate	Advanced	World-Class
			76%	

Risk Management

Weak	Marginal	Intermediate	Advanced	World-Class
		68%		

Customer Trust and Experience

Weak	Marginal	Intermediate	Advanced	World-Class
		60%		

Financial Integrity and Forecasting Accuracy

Weak	Marginal	Intermediate	Advanced	World-Class
		68%		

Operational Efficiency and Cost Control

Weak	Marginal	Intermediate	Advanced	World-Class
		64%		

Digital Transformation and Innovation Readiness

Weak	Marginal	Intermediate	Advanced	World-Class
		56%		

Data Governance, Ownership and Accountability

Weak	Marginal	Intermediate	Advanced	World-Class
	36%			

Competency: Strategic Decision-Making & Business Performance

Your Strategic Decision-Making & Business Performance Score is:

76%
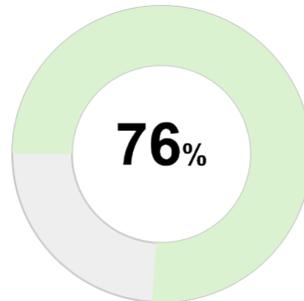
Your Rating is: <u>Advanced</u>
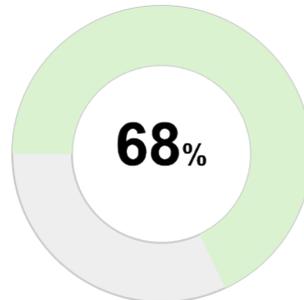
<u>Assessment Findings:</u>

Data appears to perform a key role in both shaping business strategy and tracking strategy execution through analytical dashboards that deliver data-driven, performance-related insight to business leaders. Equally, strategic KPIs seem to be tied directly to data quality with regular reviews to ensure the right data is on hand at all to facilitate pro-active business decisions. In summary, there appears to be a high degree of trust in data across the entire organization.

<u>Recommended Actions:</u>

Continue to automate all data sources, pipelines and delivery engines across all business operations to improve the relevance, immediacy and accuracy of business insights feeding into executive dashboards. Similarly, seek to extend current data sets with historical data and external data sources to provide expanded coverage and spread for business insight and increased forecasting accuracy. Finally, consider reviewing and enlarging the scope of current KPIs to link performance metrics more closely with strategic initiatives, thereby allowing for greater alignment and prioritization of investment decisions and resources.

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Competency: Risk Management

Your Risk Management Score is:

68%

Your Rating is: Advanced
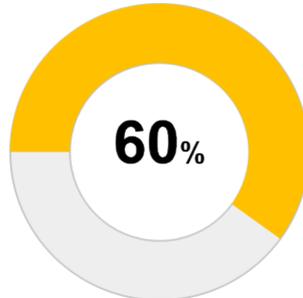
Assessment Findings:

The organization appears to have defined, developed, implemented and successfully integrated risk policies for most, if not all, core processes and systems. Highly-quality, standardized and consistent risk-oriented data supports these procedures, thereby enabling a seamless approach for risk management across business operations. Dashboards monitor risk events and emerging threats are seemingly identified in real-time with alert procedures, meaning risks can be mitigated as they surface or occur. Finally, the business functions appear to be educated in potential threats, risk policies and procedures with some cross-functional collaboration to address data-related issues that should facilitate more proactive capabilities over time.

Recommended Actions:

Augment current competencies by introducing more regular and formal risk reviews to ensure real-time monitoring procedures remain fully aligned with constantly changing and evolving risks and potential threats. Similarly, expand the use of predictive analytics to identify potential internal risks, such as fraud or malpractice, across operational procedures as well as potential external (cyber) threats. Finally, mitigate the potential impact of the occurrence of risk incident by reviewing and augmenting governance frameworks to ensure business continuity procedures are embedded in the risk management framework.

Competency: Customer Trust and Experience

Your Customer Trust and Experience Score is:

60%

**Your Rating is: <u>Intermediate</u>**

Assessment Findings:

Core customer data appears to be reasonably complete, stable and accurate such that a holistic single view of the customer is evolving. The organization has seemingly started to focus on customer journeys with some limited personalization of offerings but efforts are being hampered by both a lack of depth in customer profiles and real-time updates. There is evidence to suggest some customer interests and behaviours are being gathered but not yet acted upon. Progress is clearly being made on customer experience management but gaps in customer data continue to impact trust.

Recommended Actions:

Improve timeliness and accuracy of customer data for all interactions and customer touchpoints by improving refresh rates and cycles for all customer-facing systems. Consider enriching customer data sets by leveraging data from external sources and third-party data providers to build a rich, holistic, single 360° view of the customer. Map and analyse customer journeys to determine how and when data quality issues severely impact customer experiences. Finally, introduce customer feedback loops to better understand customer experience breakdowns and build plans to mitigate the most frequently occurring issues.

Competency: Financial Integrity and Forecasting Accuracy

Your Financial Integrity and Forecasting Accuracy Score is:

68%
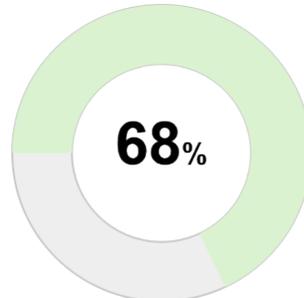
Your Rating is: Advanced
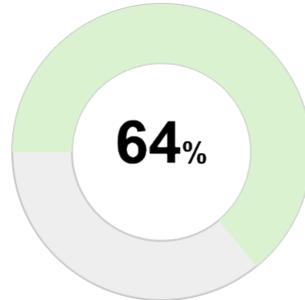
Assessment Findings:

A high level of financial system integration appears to be in place, underpinned by highly consistent data and embedded financial controls, that is facilitating financial integrity across all business functions. Forecasting is seemingly data-driven with regular refreshes based on real-time inputs to ensure that the business can monitor KPIs and proactively measure performance against forecasts and budgets. Furthermore, it seems that governance over financial master data is strong, meaning that finance has confidence to play a strategic role in advising business decisions.

Recommended Actions:

Create a more unified and holistic planning approach by linking operational data to financial data. Extend monitoring to cover forecasting accuracy and subsequently optimize models to ensure forecasting is fully aligned with financial disciplines. Take steps to enhance existing analytical tools supporting the finance function with scenario planning and stress testing capabilities to better anticipate and forecast the impact of potential shifts on the financial stability and integrity of the organization. Strive to introduce key data-driven financial insights at board-level in support of strategic decisions.

Competency: Operational Efficiency and Cost Control

Your Operational Efficiency and Cost Control Score is:

64%

Your Rating is: Advanced
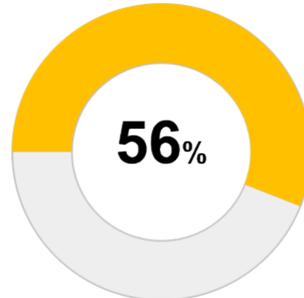
Assessment Findings:

Operational data appears highly consistent, accurate and reliable with operations and processes automated and integrated across business functions, resulting in business performance being monitored and measured via KPIs in real-time. Cost control measures appear to be proactive with any inefficiencies being identified early and remedial action undertaken. Equally, operational planning and execution is seemingly tightly aligned through shared data across the business teams. In summary business leaders have real-time insights and use data proactively to manage costs, reduce waste, and optimize processes.

Recommended Actions:

Enhance the ability to pro-actively measure and manage business operations by embedding analytics into workflows for live decision support across business operations. Develop and deploy a procedural data-driven approach to link operational efficiency metrics to financial outcomes, thereby integrating KPIs and metrics into operational scorecards. Expand the use of predictive modelling for cost scenarios and operational risks. Finally, consider introducing benchmarks across operational processes to determine any performance gaps or deficiencies across functional teams, while also linking supplier, workforce and asset data for full-cost visibility.

Competency: Digital Transformation & Innovation Readiness

Your Digital Transformation & Innovation Readiness Score is:

56%

**Your Rating is: Intermediate**

Assessment Findings:

There is evidence of some digital initiatives being in place, supported by a foundational data platform, which are seemingly showing early signs of positive impact on business performance. Data quality appears to be improving on the back of evolving data governance practices which should stimulate more transformation and innovation projects. However, cross-functional collaboration is only just emerging and seemingly not yet consistent or advanced enough to facilitate tangible, effective organization-wide digital transformation and innovation.

Recommended Actions:

Expand and embed analytical capabilities more fully within business procedures to deliver rich data-driven insights as a foundation for innovation and transformation. Consolidate existing transformation projects and aspire to leverage the potential and benefits by launching an enterprise-wide digital innovation program with clearly defined goals, supported by KPIs to measure the ultimate effectiveness of the program. Finally, introduce and formalize policies supporting agile innovation and digital transformation as a mandate under the evolving data governance framework.

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Competency: Data Governance, Ownership and Accountability

Your Data Governance, Ownership and Accountability Score is:

36%
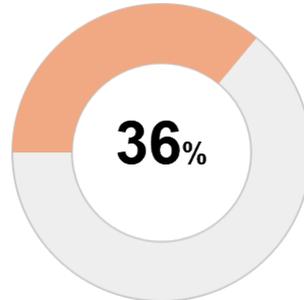
Your Rating is: <u>Marginal</u>

Assessment Findings:

Ownership is apparent in some isolated business domain but seems to be highly dependent on the inspiration and engagement of individual managers or data experts, leading to siloed pockets of ownership. The organization appears to have grasped the importance of accountability for data by creating the data steward role with some appointments also in place, however discrepancies in terms of strategy and approach between IT and business teams is hampering progress. Although some procedures have been adopted, escalation paths are not clear, causing current initiatives to stall.

Recommended Actions:

With active support and sponsorship from the senior management team, commence activities to create a data ownership framework that should specify data domains aligned to business owners and provide consistent definitions of roles and responsibilities for managing data across the organization. Communicate the framework emphasizing expectations on adherence to the framework principles by both business teams and IT groups. Finally, instigate a project to map domains to data sets and evaluate resource and skills requirements for the potential assignment of staff to ownership and stewardship roles.

Competency: Questions for Regulated Industries

Your Questions for Regulated Industries Score is:

52%
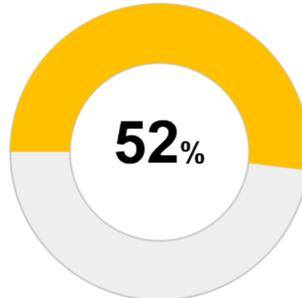
Your Rating is: Intermediate

Assessment Findings:

Compliance data is seemingly largely consistent, fit-for-purpose and reliable. There are signs that automation initiatives together with the introduction of structured reporting policies are starting to deliver more uniform and robust compliance and reporting procedures across the organization. Audit readiness seems to be improving but might be hampered by a lack of more generic, standardized and coordinated governance practices across the business functions. Glitches in operational procedures and data readiness continue to prevent seamless compliance processes and regulatory reporting.

Recommended Actions:

Aspire to improve the efficiency and effectiveness of existing compliance procedures by expanding automation including the development and deployment of specific compliance-oriented workflows. Similarly, enhance existing control procedures by introducing change logs and audit trails to gain greater insight into the use and flow of data across compliance activities. Finally, consider aligning departmental processes with common data standards to enhance the accuracy, timeliness and effectiveness of compliance reporting.
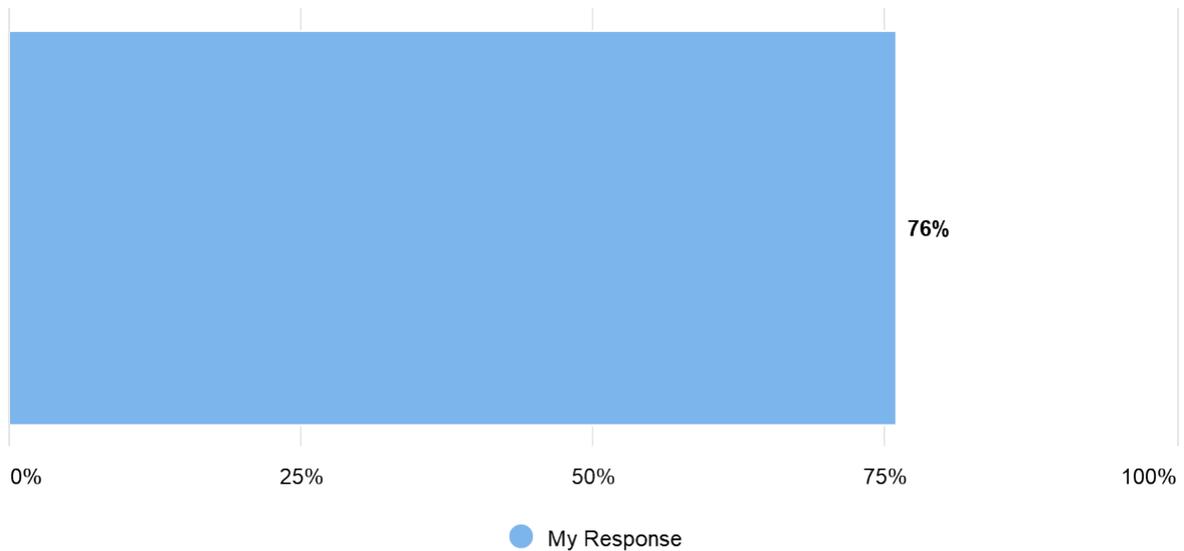
Benchmarking: **Summary**

Overall Score Benchmark
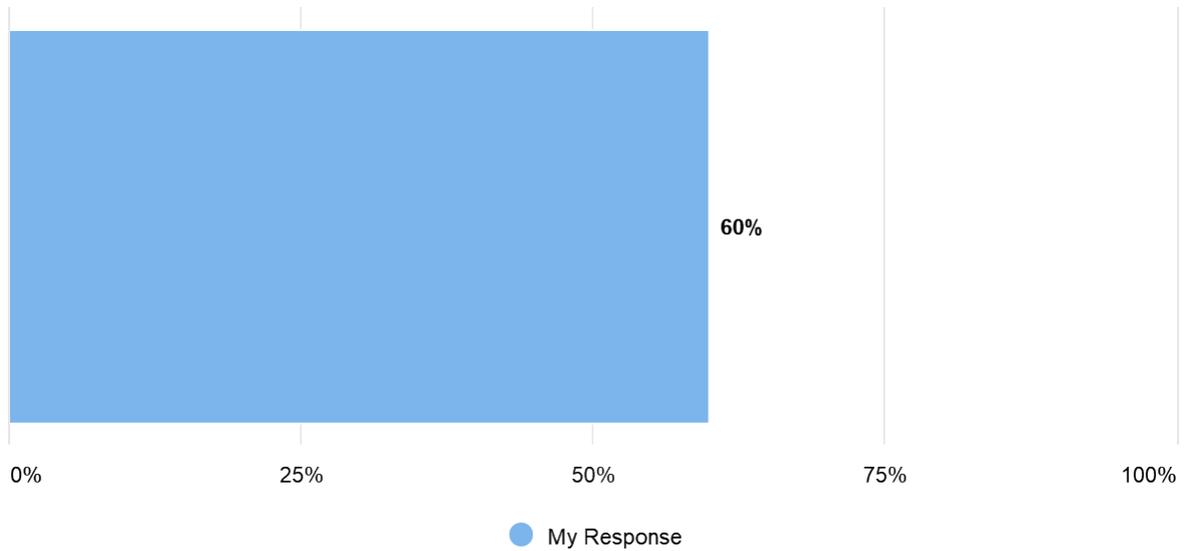
60%

Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

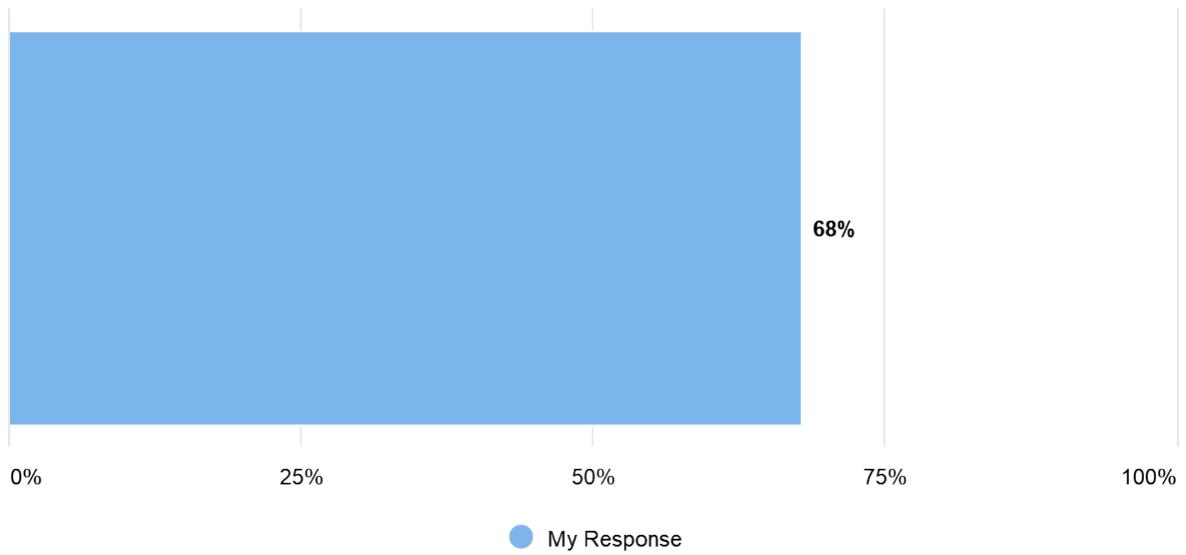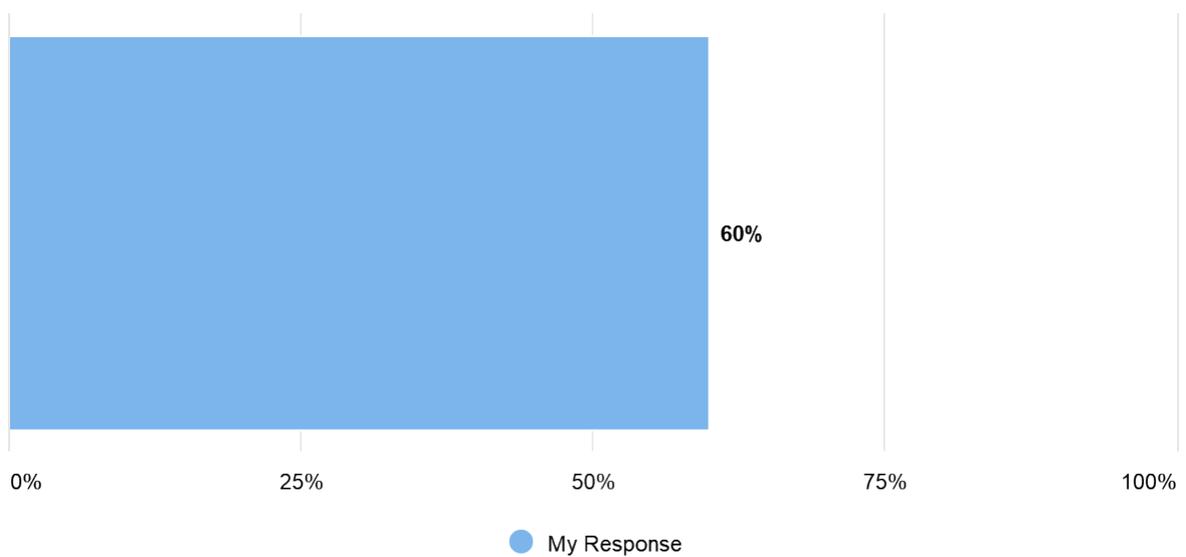## Strategic Decision-Making and Business Performance Benchmark

76%

Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

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Risk Management Benchmark

68%

⬤ My Response

*Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

Customer Trust and Experience Benchmark

60%

⬤ My Response

*Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

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Financial Integrity and Forecasting Accuracy Benchmark
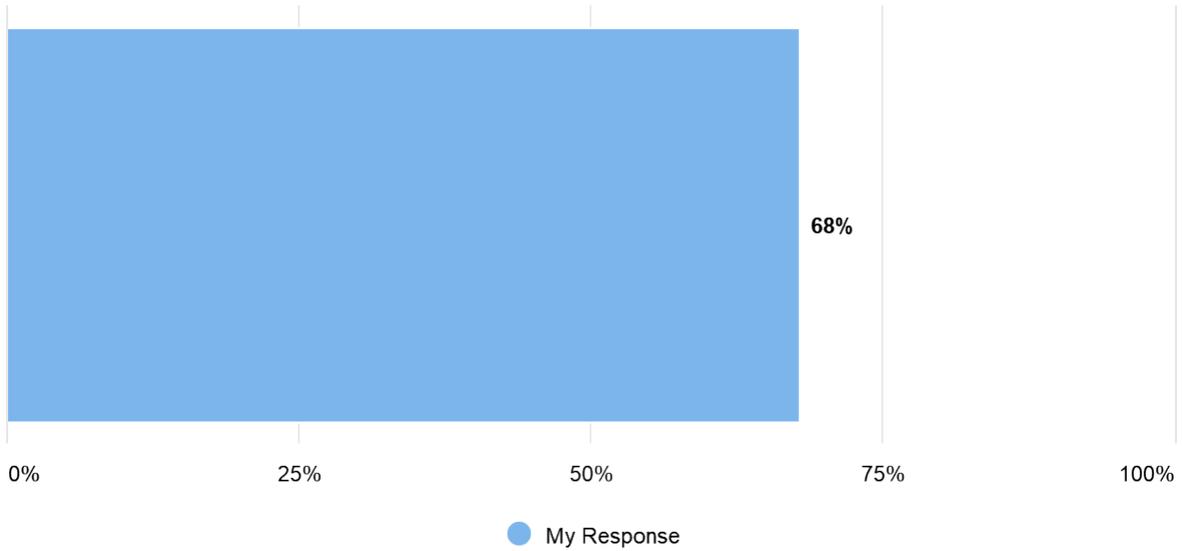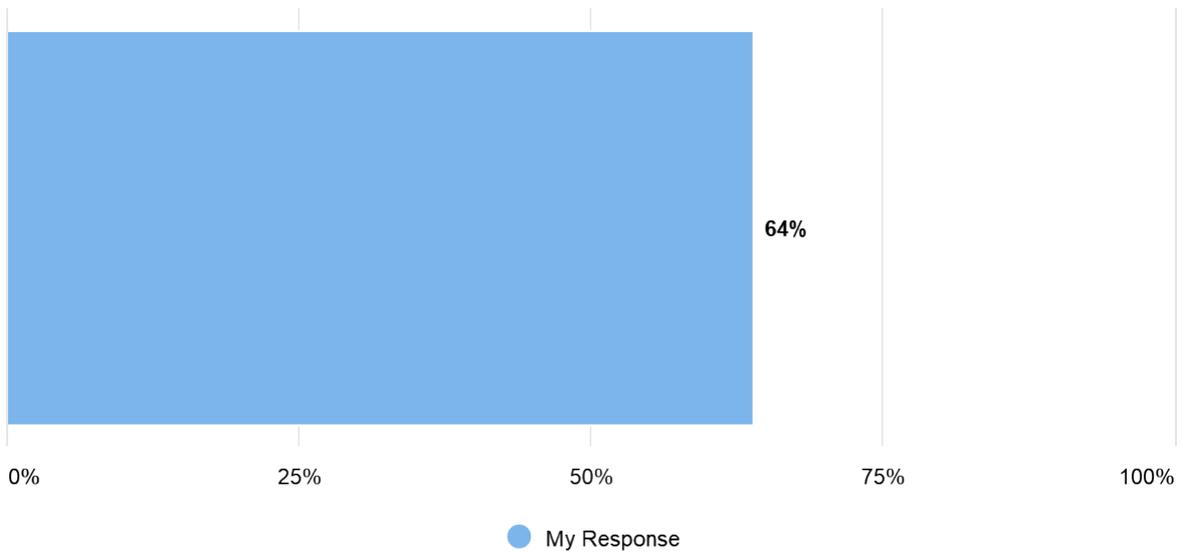
68%

0%   25%   50%   75%   100%

● My Response

Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

Operational Efficiency and Cost Control Benchmark

64%

0%   25%   50%   75%   100%

● My Response

Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

Digital Transformation and Innovation Readiness Benchmark

56%

⬤ My Response

*Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

Data Governance, Ownership and Accountability Benchmark

36%

⬤ My Response
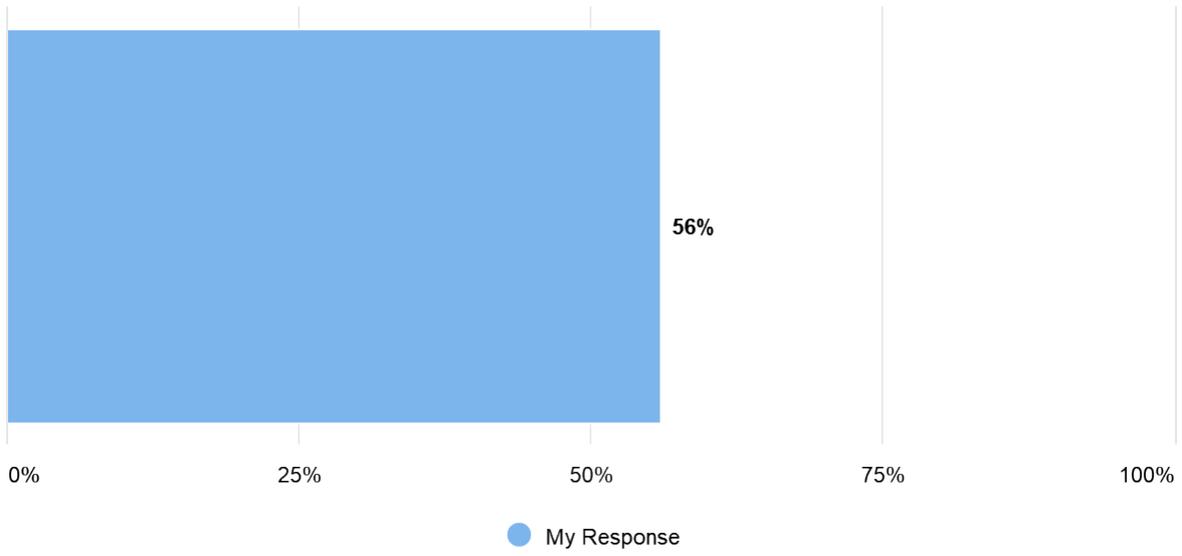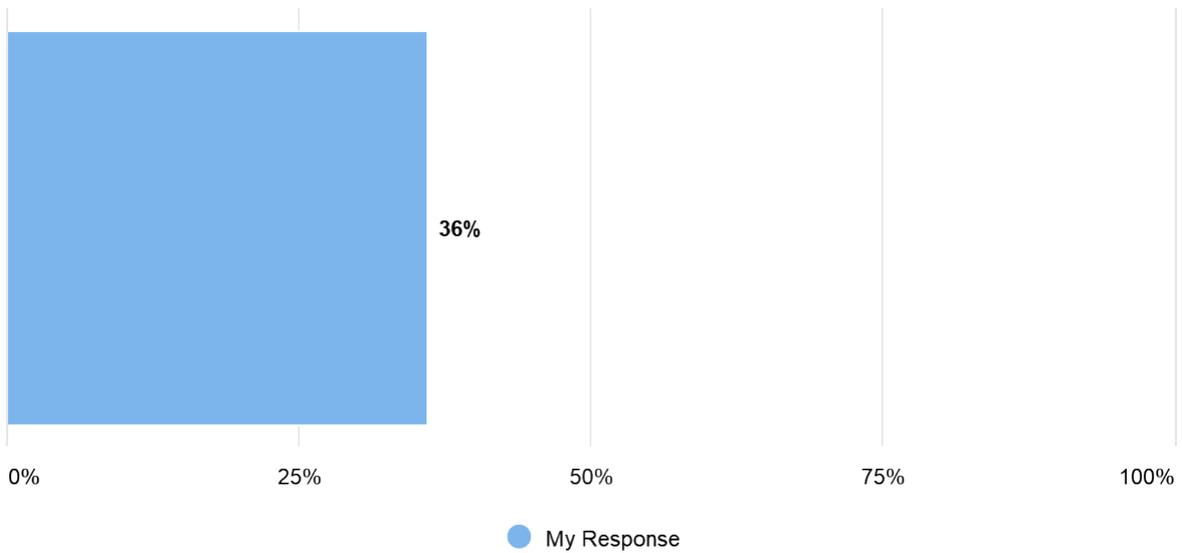
*Note: If any benchmarks are missing or appear to be incomplete, there are fewer than three assessment responses for that benchmark category.

Appendix – Questions & Responses

All the assessment questions and your responses are shown in the tables below.

Strategic Decision-Making and Business Performance

Question	Response	Score
1) Our leadership team has full confidence in the accuracy of the data used for strategic planning and investment decisions.	4 - Agree	4 out of 5
2) We have experienced delays or reversals in major business decisions due to data quality concerns.	2 - Seldom	4 out of 5
3) Our executive dashboards and reports are consistently supported by reliable and trusted data sources.	4 - Agree	4 out of 5
4) Inconsistent or incomplete data has contributed to missed revenue or market expansion opportunities.	2 - Disagree	4 out of 5
5) We have effective processes in place to validate data before it's used in high-level decision-making.	3 - Neutral	3 out of 5

Risk Management

Question	Response	Score
6) Our organization has experienced compliance or audit issues directly tied to poor data quality or traceability.	2 - Seldom	4 out of 5
7) We have reliable data controls in place to meet U.S. (e.g., SOX) and/or European (e.g., GDPR) compliance requirements.	4 - Agree	4 out of 5
8) Regulatory reports and audit trails can be generated without last-minute data clean-up or manual fixes.	2 - Disagree	2 out of 5
9) Data access, security, and retention policies are consistently enforced across all departments.	5 - Strongly Agree	5 out of 5
10) Executives are confident that our current data governance framework reduces legal and reputational risk.	4 - Very Confident	2 out of 5

Customer Trust and Experience

Question	Response	Score
11) Customer satisfaction or trust has been negatively impacted by outdated, incorrect, or duplicate data.	2 - Disagree	2 out of 5
12) Inaccurate customer data has caused service errors, miscommunication, or delivery failures.	2 - Seldom	4 out of 5
13) Our marketing and customer service systems are synchronized and based on a unified customer view.	3 - Neutral	3 out of 5
14) We are confident that experiences can be personalized without risking missteps from faulty customer data.	4 - Very Confident	4 out of 5
15) Data issues are quickly flagged and resolved before they affect the customer experience.	2 - Disagree	2 out of 5

Financial Integrity and Forecasting Accuracy

Question	Response	Score
16) Budgeting, forecasting, or quarterly reporting has been disrupted by inconsistent or inaccurate financial data.	2 - Seldom	4 out of 5
17) We regularly reconcile financial figures across systems without significant manual intervention.	3 - Neutral	3 out of 5
18) Our finance team trusts the integrity of revenue, cost, and margin data across all business units.	4 - Agree	4 out of 5
19) Inaccurate or inconsistent data has previously led to incorrect financial reporting or restatements.	2 - Disagree	4 out of 5
20) We can reliably track and report financial performance in real-time or near-real-time.	2 - Disagree	2 out of 5

Operational Efficiency and Cost Control

Question	Response	Score
21) Operational processes are delayed or made less efficient by missing, inaccurate, or outdated data.	2 - Seldom	4 out of 5
22) Our teams spend significant time manually cleaning or verifying data rather than analyzing it.	2 - Disagree	2 out of 5

23) Data quality issues regularly increase operational costs through rework, duplication, or errors.	2 - Disagree	4 out of 5
24) Poor master data (e.g., product, vendor, pricing) has caused supply chain or fulfillment issues.	2 - Seldom	4 out of 5
25) Our organization actively tracks and reduces the hidden costs of poor data quality.	2 - Disagree	2 out of 5

Digital Transformation and Innovation Readiness

Question	Response	Score
26) Data quality issues have slowed or undermined major IT initiatives such as ERP, CRM, or cloud migrations.	2 - Seldom	4 out of 5
27) A significant portion of our digital transformation budget has been used for data clean-up or remediation.	2 - Disagree	2 out of 5
28) We assess data readiness before launching automation, transformation and innovative AI or analytics projects.	2 - Disagree	2 out of 5
29) Innovation pilots have failed or underperformed due to foundational data problems.	3 - Neutral	3 out of 5
30) Our data infrastructure is strong enough to support innovation at scale.	3 - Neutral	3 out of 5

Data Governance, Ownership and Accountability

Question	Response	Score
31) Data quality ownership is clearly defined and embedded in leadership accountability.	1 - Strongly Disagree	1 out of 5
32) Both IT and business leaders share responsibility for maintaining high data quality.	2 - Disagree	2 out of 5
33) Data governance policies are consistently applied across business units and systems.	2 - Disagree	2 out of 5
34) Data quality metrics and issues are reviewed regularly by senior leadership.	2 - Seldom	2 out of 5
35) Business performance metrics include goals related to data quality improvement.	2 - Disagree	2 out of 5

Questions for Regulated Industries

Question	Response	Score
36) Our organization has experienced compliance or audit issues directly tied to poor data quality or traceability.	4 - Agree	2 out of 5
37) Compliance processes often come to a standstill due to a lack of trust in the data.	4 - Regularly	4 out of 5
38) We have confidence in the quality of information in the compliance reports that are submitted to regulatory bodies.	2 - Somewhat Confident	2 out of 5
39) The lack of quality in compliance data directly impacts and increases the risk of compliance breaches to our organization.	3 - Moderate Impact	3 out of 5
40) We have developed a governance framework that is highly effective in supporting compliance practices.	2 - Disagree	2 out of 5