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## The Dispiriting Dilemma of Dueling Data Sets

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Maybe this has happened to you. You're trying to develop an important strategy, and you need crucial information to make a big decision. You call together your relevant team leaders to gather input.

Each gives you a piece of the puzzle, but somehow the pieces don't fit. Page after page of "analysis" produced by various analytics partners raise more questions than they answer and only add to the uncertainty you already feel. After an hour of debate, you're not close to an answer and are rapidly losing hope that one can be found. You flash back to other times you've run into the same problem and flash forward to the times it will happen again. You grow increasingly frustrated and begin to seriously question all the hype around data and analytics. It doesn't have to be this way.

The goal of an analytics team should be to answer questions and inform productive debate. If data drives conversation about the business, then the analytics team has done its job; if the conversation is all about the data itself, then the team has failed. While there are tactics that make it relatively easy and quick to resolve each individual instance, to make long-term change an organization must also evolve its analytics culture and uplevel its analytical talent.

Too often, there's little or no coordination among analysts who support different departments, so their analyses, while valid from their limited perspectives, tell only part of the story and cloud the bigger picture. I call it the Dispiriting Dilemma of Dueling Data Sets. At many companies, there is no one person charged with reconciling two or more seemingly contradictory data sets and getting closer to the truth. It's a necessary role that requires a fair amount of time and energy but, if done right, will save much more.

## First, figure out what's happening

To prevent dueling data sets from causing a dilemma that is, well, dispiriting, the analytics team must prepare an analysis that will yield a single, objective measure of the truth. This often requires a third-party — probably a senior analytics leader — to take the role of lead investigator, and is usually kicked off by a request that sounds something like, “Hey, senior analytics leader, can you take a look and figure out what’s going on?”

These investigations start with a series of targeted conversations to gather a deep understanding of the problem. In those conversations, I, as the senior analytics leader, would ask questions and look for clues that help me identify the root of the issue: Does everyone agree what the objective is? Do they agree what success looks like? Are metrics defined consistently? Is there a process problem (e.g., the leads are good, but they get to the sales team too late)?

I also ask a series of discovery questions: Do you have a hypothesis? Did something change? What makes you think the problem is X and not Y? Is it possible that...? Why has this question been so hard to answer?

Last, I ask about all of the hallway conversations that swirl around what has likely become a third-rail question. Nature abhors a vacuum, and in the absence of objective intelligence, all sorts of theories emerge and can eventually anchor themselves as truth.

## Answering the question

Once I've gathered the pieces of the puzzle, I am ready to start developing an analytical plan — always with an eye toward the conversation it will drive.

First, I develop my own perspective. This almost always requires cleaning up noise created by earlier analyses that were inconsistent, incomplete, and cobbled together like Frankenstein's monster through a series of uncontextualized data requests.

Once I know the complete story, I contrast that answer with previously presented theories. If a question has been debated for any length of time, simply throwing another answer into the mix will actually make things worse. Myths and misconceptions have to be explicitly debunked and pushed aside in order to make space for a new truth.

Next, each business leader involved is likely to have key metrics they cling to. It is critical to recognize the validity of those metrics, place them in the context of the bigger picture, and then expand the meaning of each metric by presenting it through the lens of the business as a whole.

Finally, I present my conclusion and recommendations. Impartial and informed by close study of the data from multiple perspectives, my answer is rarely perfectly aligned with any individual business leader's. In almost every case, the truth is more complicated than any single perspective, with opportunity existing on several fronts. If I've done my job well, the conversation organically pivots away from my analysis in favor of what actions the business can take. If I've done my job *really* well, those same leaders that I've just fact-checked thank me and ask me to stay close as they move forward.

## Avoiding the problem in the first place

In a perfect world, of course, undergoing data investigations like the one above would be rare. The senior analyst would proactively try to avoid a lengthy investigation by coordinating the analytical team and promoting a more coherent approach on a daily basis. I won't go into all the necessary changes in this article, but I will discuss two big ones that will help a lot.

Most analysts, through no fault of their own, are ill-equipped to deal with sensitive business scenarios. They are trained in algorithms and programming but have almost no training in applying those skills within a business context. Business leaders, on the other hand, know what they need to accomplish but aren't trained in analytical methodologies and practices. These two groups of experts are separated by a chasm that wastes time, creates frustration on both sides and ultimately blocks business value.



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To better position analysts to get to the root of the question more quickly, train them to understand business problems and help the business partner define business problems. This will enable them to act as strategic thought partners who can resolve problems rather than contribute to them. When a business leader asks for data, the analysts should respond, "Help me understand what you are trying to achieve, so I can better meet your needs." This is the start of a conversation similar to the one described above, and is absolutely essential to avoiding the chaos that misdirected analyses often spin up.

Once analysts have become the thought partners we need them to be, business leaders would also do well to adjust their approach. Instead of calling on the analytics partner once the business leader thinks he knows what data is needed, he should engage his analytics partner in a conversation and share the context behind the request. In my experience, a 15-minute conversation can mean the difference between a complete answer in one day vs. an endless stream of requests dripped out over a week or more. That will mean less frustration for you and the opportunity to finally experience what all the hype is about.



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