

Gartner Research

Tailored Engagement Approaches to Improve Data Literacy in Midsize Enterprises

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Initiatives: Midsize Enterprise CIO Leadership

Low data literacy results in uninformed decisions that impede digital business growth. This research shows CIOs how Froedtert & the Medical College of Wisconsin built data literacy by tailoring their engagement approaches to suit different stakeholder needs.

Midsize enterprises (MSEs) view data analytics as a top enabler of organizational growth. According to a recent Gartner survey, boards of directors in midsize organizations identify data and analytics (D&A) as one of their top three “breakthrough” technologies that are imperative to the digital business success of their company. ¹ D&A enables organizations to make informed data-driven decisions that support digital business goals. But to reap maximum benefits from D&A, employees and business leaders must first develop the ability to communicate in the language of data – that is, become data literate.

Gartner defines data literacy as the ability to read, write and communicate data in context, including an understanding of data sources and constructs, analytical methods and techniques applied, and the ability to describe the use-case application and resulting value.

– *Gartner IT Glossary*

Nearly half of the MSEs surveyed by Gartner report enhancing data literacy through data literacy programs and/or trainings as one their top five D&A priorities. ² However, these formal data literacy programs apply a “one-size-fits-all” approach that overlooks different learning styles and the individual needs of executives making crucial decisions.

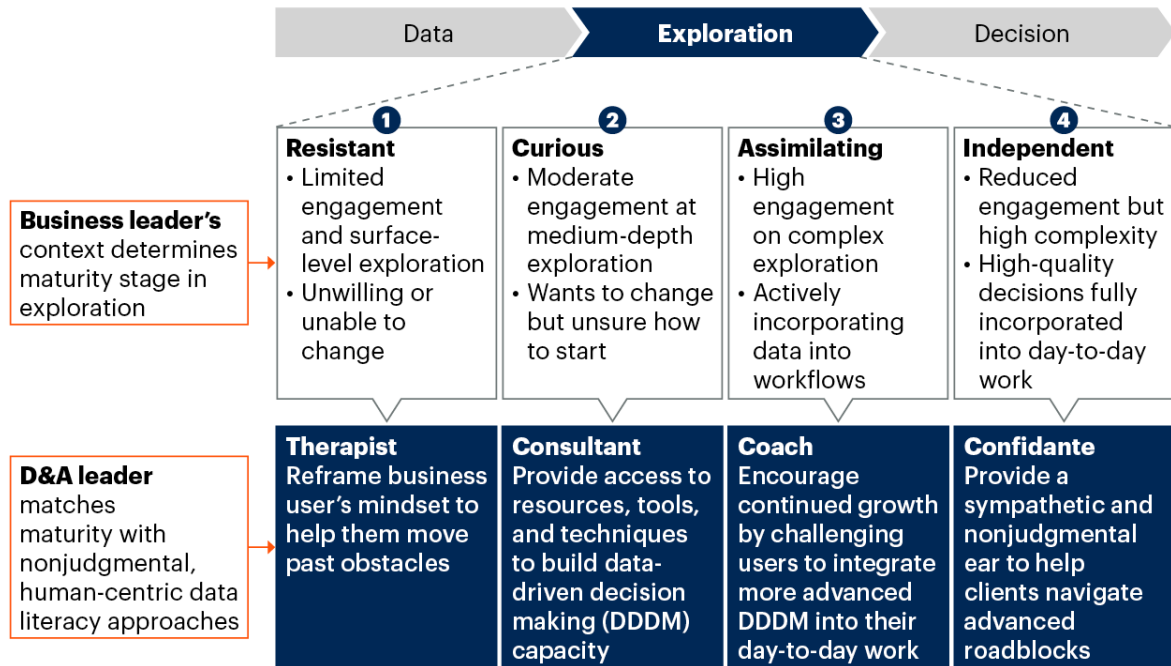
Progressive midsize organizations tailor engagement approaches to match different levels of maturity and learning styles. Doing so serves executives’ needs and gradually builds their confidence in data-informed decisions.

The chief data and analytics officer (CDAO) of Froedtert & the Medical College of Wisconsin, Stephanie Lenzner, takes executives’ beliefs and behaviors into consideration to build a tailored but scalable data literacy program. Based on D&A maturity levels, Stephanie segments executives and business partners into four categories: Resistant, Curious, Assimilating and Independent. These categories represent an executive’s attitude toward D&A as well as their skill level. She then matches each category to a unique engagement approach that best-serves executives’ needs (see Figure 1):

- **Resistant** – Embody a **therapist** role to reframe executives’ mindsets when they are unwilling to learn
- **Curious** – Adopt a **consultant** role to provide access to relevant resources that help build foundational capabilities
- **Assimilating** – Perform the role of a **coach** by facilitating the advanced use of data for day-to-day decision making
- **Independent** – Act as a **confidante** that provides expert guidance and helps overcome advanced roadblocks

Figure 1: Tailored Engagement Approaches

Engagement Types



Source: Adapted From Froedtert & the Medical College of Wisconsin
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To identify the best way to engage, Stephanie uses the executive’s context and D&A maturity levels. Existing data from platform usage statistics, service request intake forms and anecdotal evidence are used to support segmentation decisions. Once the four categories are determined, she tailors engagement postures to improve data literacy skills. After Stephanie adopted more mindful engagement approaches, she saw substantial improvements in data-driven decision-making in the organization. As MSE CIOs look to increase investments in digital initiatives, they must recognize business leaders’ learning needs and adapt engagement approaches accordingly. Doing so will help shape business leaders’ mindsets and improve their data literacy skills over time.

by Hemantika Malik

Recommended by the Authors

Data and Analytics Use Cases for Midsize Enterprises
 4 Data and Analytics Personas for Midsize Enterprise CIOs
 Case Study: A Culture of Data Literacy and Data-Driven Decision Making (Froedtert & the Medical College of Wisconsin)

Evidence

¹ **2023 Gartner Board Of Directors Survey on Business Strategy in an Uncertain World.**

This survey was conducted to understand the new approaches adopted by non-executive boards of directors (BoDs) to drive growth in a rapidly changing business environment. The survey also sought to understand the BoDs' focus on investments in digital acceleration; sustainability; and diversity, equity and inclusion. The survey was conducted online from June through July 2022 among 281 respondents from North America, Latin America, Europe and Asia/Pacific. Respondents came from all industries, except governments, nonprofits, charities and NGOs, and from organizations with \$50 million or more in annual revenue. Respondents were required to be a board director or a member of a corporate board of directors. If respondents served on multiple boards, they answered for the largest company, defined by its annual revenue, for which they are a board member. Note: Here midsize organizations refer to those with revenue of \$50 million to less than \$500 million. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

² **Gartner Chief Data Officer Agenda Survey for 2022.** This study was conducted to explore and track the business impact of the CDO role and/or the Office of the CDO and the best practices to create a data-driven organization. The research was conducted online from September through November 2021 among 496 respondents from across the world. Respondents were required to be the highest level Data and Analytics leader in the organization: Chief Data Officer, Chief Analytics Officer, the most senior leader in IT with data and analytics responsibilities, or a business executive such as Chief Digital Officer, or other business executives with data and analytics responsibilities. The survey sample was gleaned from a variety of sources (including LinkedIn), with the greatest number coming from a Gartner-curated list of over 4519 CDOs and other high-level data and analytics leaders. The study was developed collaboratively by Gartner D&A Analysts and the Primary Research Team. Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect the sentiment of the respondents and companies surveyed.

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Research

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