Harvard Business Review
ANALYTIC SERVICES

Pulse Survey

TURNING DATA INTO UNMATCHED BUSINESS VALUE

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Google Cloud

Turning Data into Unmatched Business Value

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GOOGLE CLOUD

Organizations around the globe are looking to data to drive better outcomes. They want to better serve their customers. They want to develop better products. They want to run more efficiently. They want to expand their businesses and develop competitive advantages. Seemingly everyone knows that data has a role to play in today's highly digitized environment, but too many organizations think data alone will light their path. In reality, data is just the raw material needed to generate the insights that can change a business. So, how do we harness the data in a way that generates insights that, in turn, create value? What do industry leaders do differently in this space compared to other businesses?

Google Cloud and Harvard Business Review Analytic Services partnered to better understand business leaders whose organizations have been the most effective in harnessing data to create new business value and to see how they compare to their industry peers with similar aspirations. This report analyzes where data leaders are prioritizing technology investments, how they operationalize the development of business value, and the results they've seen. From revenue to profitability and from customer retention to employee satisfaction, data-to-value leaders are finding success where others continue to struggle.

At Google Cloud, we've helped customers distinguish themselves from their peers and competitors by delivering the right set of data analytics and artificial intelligence (AI) tools. We help customers break down their data silos. We help businesses bring in real-time data and make it available across the organization. We provide users with AI-powered data analysis, and we do it with tools they already know and understand.

Put another way, Google Cloud delivers a data platform on which leaders have designed drastically more responsive businesses. A "responsive" business is connected, real-time, and intelligent. Here's how we help bring that vision to reality:

- **Empower everyone to develop insights without limits.** Google Cloud unlocks the potential hidden in your data with a cloud-native, serverless approach that decouples storage from compute and lets you analyze terabytes to petabytes of data in a fraction of the time. Remove traditional constraints of scale, performance, and cost so you can ask any question of data and solve business problems. Operationalize insights across the enterprise with a proven enterprise cloud data platform.

- **Optimize business outcomes with real-time intelligence.** Automatically process real-time data from billions of streaming events, and serve insights in milliseconds to respond to changing business demands. Generate highly accurate predictive insights with industry-leading AI and machine learning services to optimize decisions and customer experiences. Augment existing skills to scale the impact of AI with automated, built-in intelligence in familiar tools.

- **Maximize value from data with a flexible, open, and multi-cloud platform.** Analyze data across multi-cloud environments from a single pane and bring analytics to data where it is. Run your analytics workflow in the most impactful way by choosing the best tool for the job and combining it through a seamless, unified experience. Google Cloud supports choice and flexibility, protecting your business from lock-in.

I hope you'll learn from the perspectives and insights we've gathered in this report. At Google Cloud, we know that data-driven innovation doesn't have a finish line—it's a continuous journey. Wherever you are on that journey, I'm confident that we can help with the right technologies for your business. If, after reading this report, you're eager to learn more about Google Cloud, I'd encourage you to visit our **Smart Analytics** site.

TURNING DATA INTO UNMATCHED BUSINESS VALUE

As organizations move further along their digital transformation journeys, it is becoming clear that data alone is not a competitive differentiator; it's what organizations are able to accomplish with data that counts, whether that's improved profitability, increased innovation, or better customer experiences.

"Data gathering peaked in the big data era, when organizations wanted to get as much information as they could," says Kristian J. Hammond, professor of computer science at Northwestern University's McCormick School of Engineering. "Gathering data is easy, but gathering information is hard. Now in this world of AI [artificial intelligence] and machine learning, organizations are thinking about how to mine that data for insight and pushing hard to get really useful information out of it."

Most organizations are gathering and attempting to use increasing volumes of internal and external data, but some are doing that much more effectively than others, a recent survey by Harvard Business Review Analytic Services found. One-third of the 311 survey respondents have shown themselves to be data-to-value leaders ("leaders"), as they say their organizations are very effective at harnessing data to create new business value. More than 95% of these leaders have a clear enterprise strategy for managing and extracting value from their data, and for collecting and incorporating external sources of data, versus less than 60% of all other respondents. As a result, these leaders are more connected, more up to date, and more intelligent.

But such organizations are in the minority today. "We have been looking at digital transformation and how ready an enterprise is to achieve that by exploiting data across the business," says Brad Shimmin, distinguished analyst with Omdia, whose own research found that less than 10% of organizations have fully exploited the value of data across the business. "That points to a great truth: turning your company into a data-driven enterprise is not something that you can do in a few month's time, top to bottom or across all departments. It's not something that you can simply invest in the right technology to make happen."

Many large enterprises have had pockets of success harnessing data to produce business value, says Geoff Woollacott, senior strategy consultant and principal analyst at Technology Business Research (TBR). But leading companies take that many steps further, establishing a C-level role to oversee that data (a chief data or digital officer), concerned not only with risk mitigation but with generating as

HIGHLIGHTS

83%
OF RESPONDENTS SAY CLOUD SERVICES THAT ALLOW THEIR ORGANIZATIONS TO DELIVER NEW CAPABILITIES WITH EXISTING SKILL SETS ARE IMPORTANT TO EXTRACTING THE FULL BUSINESS VALUE OF DATA.

80%
SAY IT'S IMPORTANT TO MEASURE AND REPORT ON THE BUSINESS VALUE OR BUSINESS OUTCOMES OF THEIR DATA AND ANALYTICS INVESTMENTS, BUT ONLY 26% SAY THEY ARE EXTREMELY EFFECTIVE AT THAT.

68%
CURRENTLY HAVE OR ARE PURSUING A MULTI-CLOUD STRATEGY.

HAVING A CLEAR ENTERPRISE STRATEGY IS AN IMPORTANT FOUNDATIONAL STEP FOR MANAGING AND EXTRACTING VALUE FROM ALL DATA.

much value from data as possible. These organizations reorganize their technology, process, and people around data, and their actions deliver results.

Indeed, looking at what the leaders do differently than the rest is instructive for any organization in the midst of digital transformation. They're more likely than other respondents to both value and facilitate the connection of data points across a variety of assets and services, real-time data access and analytics, and the AI-enabled automation of data-driven insight. They are pursuing multi-cloud strategies in higher numbers. They are more apt to measure and report on the business impact of their data and analytics investments. Most important, they're seeing results, with more leaders reporting significant growth in key performance areas like revenue and profitability, employee and customer satisfaction, and new product and service introduction.

With this research, Harvard Business Review Analytic Services explores the biggest hurdles organizations face in extracting business value from data; the importance and challenges of data democratization, multi-cloud management, and measuring the business return on data investments; and how leaders are meeting these challenges most effectively to transform their data into exponential business value.

A Strategy for Success

"There are really no businesses of any reasonable scale that don't recognize that data is gold. In some cases, that's flat out what they trade on; in the majority of cases, it's how they get better at what they do," says Barry Brunsman, principal in KPMG's CIO advisory practice. "They recognize it as a strategic priority. But they're stuck because that data is sitting in an application landscape of multiple systems and multiple instances that has evolved over time."

For too long, IT was focused on process or greater automation. "They were not focused on data as the outcome of the technology landscape," says Brunsman.

Companies have been trying to extract value from data using IT systems for some time. What's particularly challenging right now is the increased level of complexity of the enterprise data environment today, according to Dan Vesset, group vice president of analytics and information management at International Data Corporation (IDC). The volume of data has increased, with more of it hosted in multiple cloud environments, and a greater variety of data types need to be analyzed from internal and external sources. The velocity at which the data is created has also increased. "All of this creates silos," says Vesset. "And not just data silos. Analysis is being done in silos and decisions are being made in silos. Most companies are dealing with this. We're in a transition period between mostly on-premises systems and the next generation of technology platforms to unify the environment."

Without an overarching strategy for managing that data and applying it to business problems—both internal data and that from third parties—extracting any value from it is a labor-intensive and often disappointing exercise in frustration. "If you don't have business rules in place, you end up having to glue it all together," says TBR's Woollacott. "And if you need to apply that kind of 'human putty' to your data stream, you're at a significant data disadvantage."

The need to manually manipulate data leads to abysmally low data utilization figures in most organizations and results in data scientists spending the vast majority of their time wrangling data. "That's the most horrible version of what a data scientist wants to do," says Northwestern University's Hammond. "Even the best organizations have this problem."

Having a clear enterprise strategy is an important foundational step for managing and extracting value from all data. Nearly all of the leaders (97%) have established such a strategy for their own internal data, versus 59% of all other respondents. An even greater portion (99%) of leaders have a similar strategy for incorporating

external sources of data, versus 53% of other respondents. Clarity around data management and governance, and a clear direction about what an organization wants to accomplish with data-driven insight, are both critical. While data wranglers play an important role, they need to be directed toward specific tasks and goals. "You can collect and clean and distribute all this data, but if you don't have any idea what you want to do with it, you're going to fail," says Hammond. "You have to understand both the architecture and the task at hand."

That calls for the creation of data teams operating under a well-defined strategy and data governance structure to bring it all together. Companies that want to transform data into value often create cross-functional teams that include data wranglers, enterprise architects, data scientists, AI experts, and data-savvy businesspeople who can identify the problems that data might solve. "You need a group of people who together have cross-platform technology capabilities, the strategic inclination to step into ambiguity to solve these sorts of problems, and the customer relationship bent to mediate between those who don't know anything about technology and data and those who do, so you can apply data and analytics to solve problems," says KPMG's Brunsman.

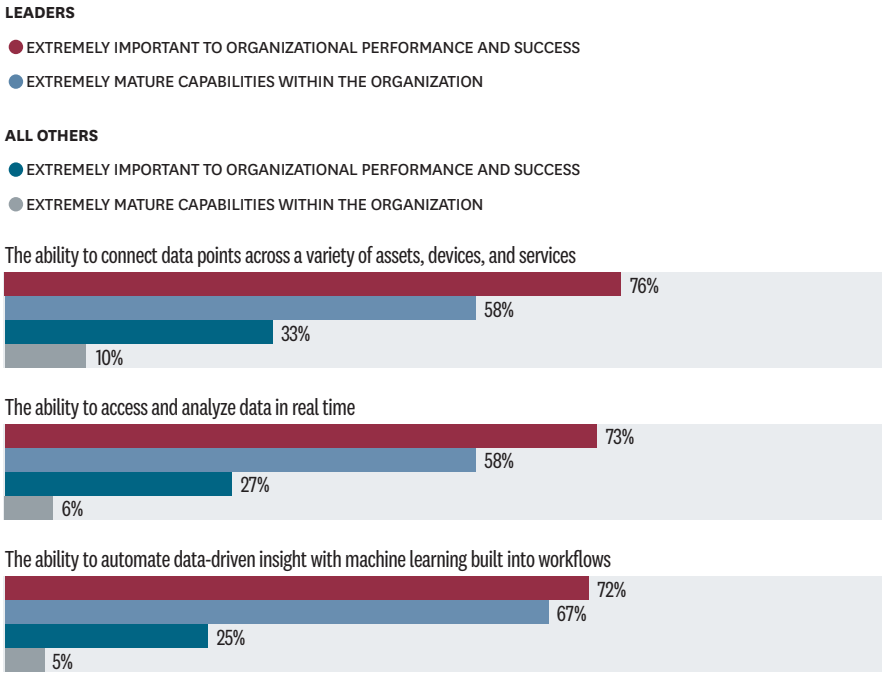
The State of Advanced Data Competencies

When asked about the importance of three advanced data and analytics capabilities—to connect data points across a variety of assets, devices, and services; to access and analyze data in real time; and to automate data-driven insights—the leaders begin to differentiate themselves from the rest of the survey respondents. Around three-quarters of leaders say their organization's overall performance and success are strongly linked to each of these capabilities, while other respondents were much less likely to say so.

FIGURE 1

LEADERS VALUE GAME-CHANGING DATA CAPABILITIES

More leaders say their performance is linked to how well they connect and analyze data, and they are more likely to have adopted advanced capabilities.



HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, MARCH 2020

Likewise, greater numbers of leaders report having mature capabilities in each of these areas. Over half (58%) indicate that their organizations are quite capable of connecting data points across assets, devices, and services, compared with just 10% of other respondents. The same proportion of leaders (58%) also say their organizations have mature, real-time data access and analytics capabilities versus just 6% of the rest of respondents. And nearly two-thirds of leaders (67%) say they have mature automation of data-driven insight using machine learning built into their workflows, while only 5% of the remaining respondents say so. FIGURE 1

That the majority of respondents have yet to integrate these abilities is not surprising. Connecting data points across a variety of assets, devices, and services, for example, is no trivial task. "Because of the history

"YOU HAVE TO AUTOMATE THE DATA SCIENCE TO TURN SYSTEMS INTO INFORMATION SYSTEMS THAT WORK WELL."
KRISTIAN J. HAMMOND, NORTHWESTERN UNIVERSITY

of what we've done, we've got a lot of data silos," says Hammond. "There are technical issues related to moving data from where it was produced to somewhere else, as well as organizational and political issues." Data leaders determine how to bring together data not only from their own heterogeneous mix of systems, but from external sources, too.

There are numerous hurdles to real-time analytics as well. There's the question of computing resources, for one, says Woollacott of TBR. "Should they put the analytics at the edge near the data or consolidate it at the application level in the cloud or the data center?" In many cases, the underlying application architecture may limit real-time opportunities. "If you're running on a mainframe," says Brunsman, "there may be no real-time options."

The ability to implement analysis in a timely fashion is also dependent upon greater automation—that third capability that leaders cite as important to their success. Using machine learning or other intelligent automation capabilities to inject insight into workflows becomes necessary. "You can't do real time if you need a person in the loop to translate between business goals and outcomes," Hammond says. "You have to automate the data science to turn systems into information systems that work well."

Greater automation, likewise, is fraught with challenges that leaders are overcoming. It requires advanced machine learning skills and good data. "Right now, there is the liquidity of talent issue: there are not enough people who know how to do machine learning well enough to meet the need," Brunsman says. "People want to use those tools for better analytics, but they need access to reliable data, or else you're teaching the system a bunch of garbage."

In addition, automating insight demands diligence. "You need to establish continuous learning and feedback loops as well as KPIs for exception reporting," says Woollacott.

Advanced analytics and machine learning are sexy, adds Shimmin, but must be handled with care. "If you think of the data-driven business as a refinery, advanced analytics is a refinery within that refinery," he adds. "It's highly explosive: vastly impactful but fraught with peril, so you have to be careful how you apply it." Companies are in the very early stages of this kind of intelligent automation, says IDC's Vesset.

Recognizing the importance of honing advanced capabilities to data-driven transformation, leaders are clearly willing to address the difficulties associated with these analytics skills and adopt them at much greater levels than their counterparts.

Tools for Extracting Data Value

Across all respondents, there are certain foundational positions or capabilities that have emerged as important to extracting the full business value of data. Chief among them are cloud services that allow organizations to deliver new capabilities with their existing skill sets, automated data encryption and security, data access across systems and locations, and real-time analytics capabilities. FIGURE 2

Yet only a minority of organizations say they have these capabilities in place across the enterprise. Leaders, however, are further along in their adoption than others. For instance, 44% of leaders say they have fully adopted real-time analytics, while just 6% of other respondents agree. "The fastest-growing area in terms of investment is to get to as real time as possible. That is, in part, a reaction to faster business cycles and the drive toward faster decision cycles," says Vesset. "It's important to have that data as quickly as possible—even more so as uncertainty has increased. Most investment in the past has been in batch processing. Real time is where more companies need to invest."

Nearly a third of leaders (32%) say they have a broad ability to access data across systems and locations versus just 10% of other respondents.

"Silos are a number one issue," Vesset says. "In marketing alone, they may have multiple different applications and cloud environments. Very few companies have gotten rid of silos." A similar proportion of leaders (31%) indicate wide adoption of cloud services that work with their existing skill sets, compared with 6% of other respondents.

When you expand the view to include both limited and widespread adoption, the numbers grow, with leaders still outpacing the rest. FIGURE 3 The most oft-cited capabilities include the ability to access data across their IT systems environments, data encryption and security automation, real-time analytics capabilities, and cloud services that don't require entirely new skill sets to manage.

A Bedrock in the Cloud

As organizations seek to expand their adoption of these capabilities and overcome challenges, multi-cloud strategies are gaining steam. More than two-thirds of respondents (68%) say their organization currently has or is pursuing such a strategy today, with that number likely to increase to 71% in two years' time. Leaders are even more likely to be embracing a multi-cloud approach, with nine out of 10 either having or pursuing that today. FIGURE 4

A number of business drivers are fueling multi-cloud adoption rates: greater operational efficiency (cited as a top-three driver by 42% of all respondents), performance optimization (35%), cost optimization (33%), increased agility (31%), risk mitigation (30%), and access to best-in-breed solutions (24%).

There continue to be a number of hurdles to greater multi-cloud usage for some organizations, however. Chief among them are security concerns (33% chose this as one of their top three challenges), lack of necessary skills (29%), interoperability and integration concerns (28%), issues related to legacy systems (25%), and resistance to change in the business and investments already made in existing infrastructure and applications (both 24%).

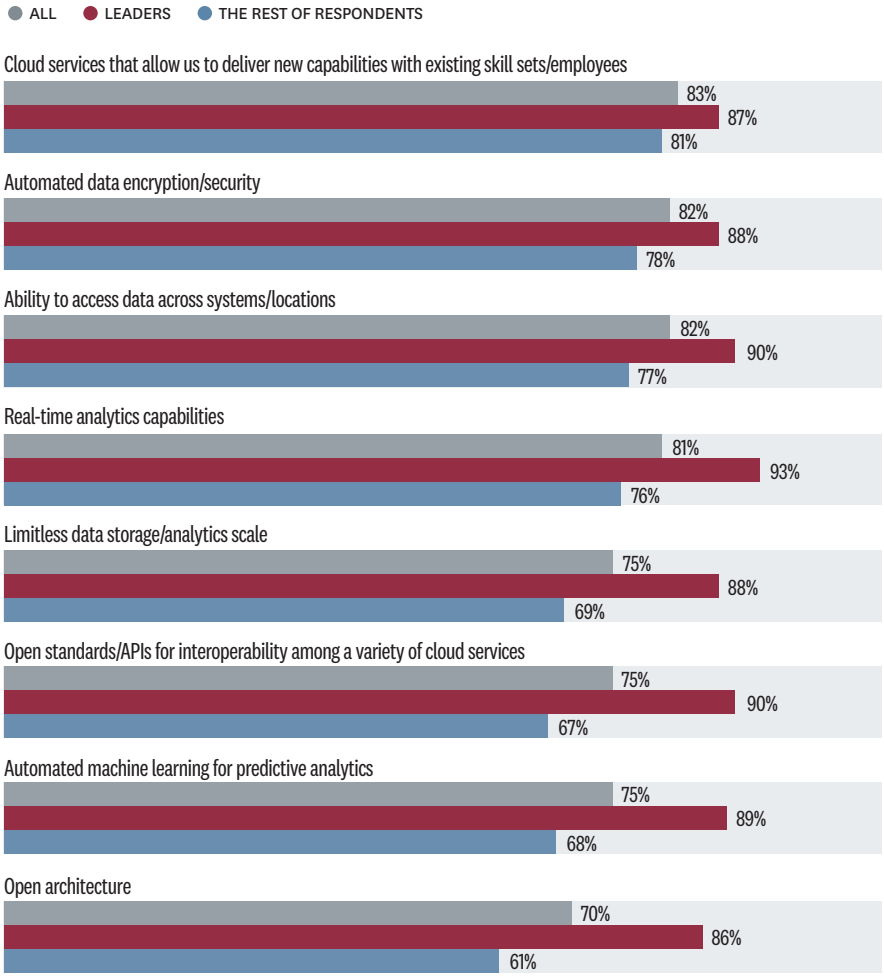
Still, companies that want to transform the business with data have no choice but to invest in the cloud. "There are a number of benefits you could never afford on your own," says Shimmin of Omdia. "And if you're investing in AI and machine learning in the enterprise, that's where AI acceleration lives."

FIGURE 2

A TOOLKIT FOR TRANSFORMING DATA INTO VALUE

The majority of respondents agree on the key capabilities underpinning data-driven transformation, with leaders valuing these tools even more.

How important is, or would, each of the following capabilities be to extracting the full business value of data in your organization? [7-10, ON A SCALE OF 0-10]

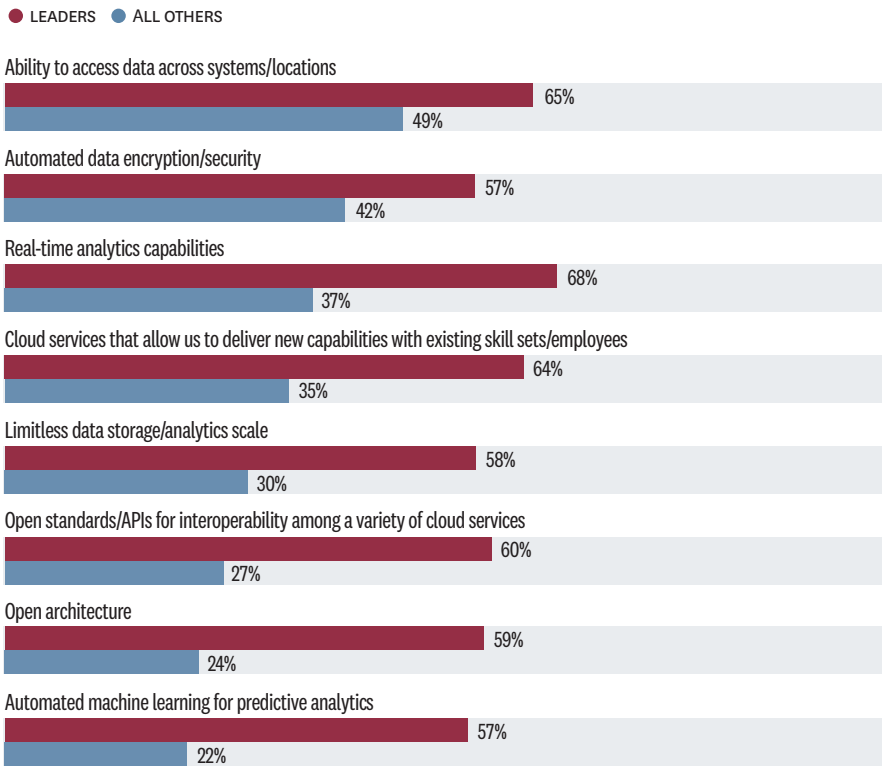


SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, MARCH 2020

FIGURE 3

LEADERS ADOPT THE CAPABILITIES NECESSARY TO DELIVER VALUE

Percentage of respondents in each category reporting either limited or widespread adoption of these capabilities



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, MARCH 2020

Diversifying among a number of public cloud vendors is about accessing not only best-of-breed solutions, adds Shimmin, but best-of-need capabilities. Leading companies are looking for the best tools for the data jobs at hand. "Are you dealing with IoT [internet of things] data? Do you need a relational database? Each unique solution demands different data storage and processing," Shimmin says. "That leads to fragmentation. You're always going to have a heterogeneous environment."

Managing the mixed cloud environment can test organizations on a number of fronts. Respondents say their biggest challenges are a lack of necessary skills (a top-three management issue for 35%), the difficulty of service integration and management (33%), data governance and management issues (31%), the challenges of performing analytics across a diverse IT environment (30%), and lack of standardization for cloud management and configuration (29%).

"Multi-cloud management is never easy, but some companies are doing better than others," says IDC's Vesset. "You need the right tools, but just as importantly you need to invest in governance." Cloud silos can be a real issue. "Moving things between providers is non-trivial," says Hammond. "There are always trade-offs. If you need to do something to improve functionality for one task, you may decrease your ability to redeploy that data or process it for another task. If you're doing that all the time, it can come back to bite you."

Few organizations are mature in their multi-cloud management, according to Brunsman. "And when you're trying to do things with this data, you need to feel confident you can manage these public platforms. Data can be a victim of the relative lack of maturity, but there will be some rapidly developing experience in multi-cloud management."

The holy grail is automated integration of the multi-cloud environment, says Woollacott, decreasing the need for so many different skills and toolsets. There may always be some cloud platform lock-in, says Shimmin, but those leaders that "invest in cloud-first development give themselves the opportunity to combine services in the most optimized way."

The Call to Democratize Data

The greatest return on data, of course, will come when access and analytics are available throughout the enterprise. Indeed, a significant majority of respondents recognize the importance of putting data and analytics in the hands of employees in order to drive better outcomes; more than three-quarters of all respondents (77%) say that democratizing data is important to their business success.

However, this is an area where many companies also struggle. "If you ask

most people if they have democratized their data so it can be used by anyone, the answer is almost always no," says Brunsman. "They want data and analytics to be used in every part of the organization where it can deliver value, which is everywhere. But to do that they need to replumb the data supply chain—from ingestion to disposition. And many have not."

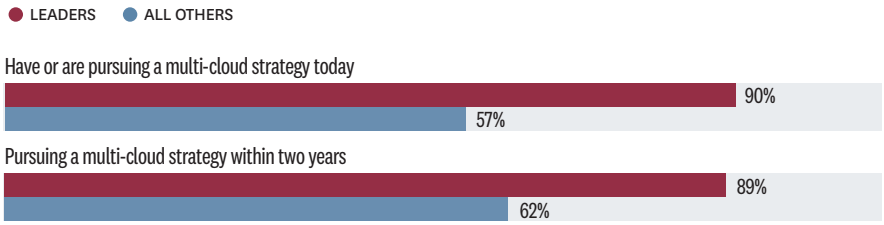
Leaders are in a far better position than most, with 60% saying their organization is very effective in giving all employees data access and analytics tools, compared with just 7% of all other respondents. This may be due to the fact that they are nearly twice as likely as others to consider data democratization very important to their success. FIGURE 5

In many companies, "data is controlled by people who understand data and needed by people who don't. That's a genuine issue," says Hammond. "They will always have a wall between what is needed and what people have access to, because relying on a data scientist in the middle is a solution that doesn't scale." Self-service analytics is one way forward, eliminating the need for engineers as data-to-value sherpas. "Instead, you can give people tools so that they can not only access the data, but trust and understand it."

FIGURE 4

THE MARCH TO MULTI-CLOUD

Leaders by and large have embraced a multi-cloud strategy, with other organizations increasingly adopting the approach.



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, MARCH 2020

FIGURE 5

DATA AND ANALYTICS FOR EVERYONE

Leaders put an emphasis on delivering data and analytics capabilities to all.

SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, MARCH 2020

The Return on Data

What's holding organizations back from making more of these investments that ultimately enable them to derive more value from their data? "People say data is the new oil, but for many companies it's the old oil: predominantly sitting in barrels waiting to be processed in a refinery in order to provide value," says Shimmin. "They think data is worth money, but they haven't seen it put any cash in the cash register. They need to view their data stores as not just oil stored in barrels, but something they need to process to turn into someone actionable and valuable across the business."

Connecting the dots between the capabilities that enable insight and the resulting business value is key. Eight out of 10 respondents overall say it's important to measure and report on the business outcomes of their data and analytics investments (93% of leaders say so). But many organizations have difficulty accomplishing that. A little over half of leaders (58%) indicate that they are extremely effective at measuring and reporting the business impact of data analytics and investments, while only one out of 10 of the rest of respondents say so. It's an area where all organizations can improve.

"It's a causality problem. When people think about identifying business value, they want to say 'we did this and out came that,'" says Brunsman. That's difficult to do unless you've structured a specific inquiry around data to, say, optimize a marketing campaign. The connection between data, analytics, and business outcomes can be fairly abstract."

"ORGANIZATIONS THAT ARE MORE MATURE IN THEIR DATA ANALYTICS CAN "INCREASE THE VELOCITY OF BUSINESS INNOVATION CYCLES."
GEOFF WOOLLACOTT, TBR

But measuring and reporting on those discrete wins can illustrate what is possible on a larger scale. And those possibilities are proven out by the leaders. The decisions they are making to succeed where others struggle—whether that's adopting and managing multi-cloud environments, investing in the necessary capabilities, or democratizing data and analytics in the organization—appear to coincide with real business benefits.

A mid-level operational decision based on data analytics or a strategic decision about entering a new market that has a long-term payoff can be more difficult to pinpoint. "You need a framework for doing so," says Vesset. That will require a combination of qualitative and quantitative analysis to assess the quality of decisions made. "Oftentimes there is a tendency to want to take data and connect that directly to higher revenues or profit, but that misses a step in between," Vesset says. "You need to measure the impact on the decisions you're making. Are you making them faster or better? Did you have the right analytics to make them?" Then organizations can connect the dots: better decisions drive better outcomes.

And leaders are seeing better outcomes. They not only saw significant increases in operational efficiency over the past year (46% say so versus 20% of others), but also saw significant lift in more strategic metrics of performance. Nearly twice as many leaders as the rest have seen both revenues and profitability increase significantly. Likewise, employee satisfaction has grown significantly for more than double the number of leaders as other respondents. Customer retention and loyalty are up significantly for 36% of leaders versus 19% of others, and their data and analytics expertise is fostering greater innovation and winning more market share.

When it comes to innovation and expansion, a full 35% of leaders are introducing significantly more new products and services, compared with 23% of others, and 33% of leaders have seen their market share surge, compared with 15% of others.

Organizations that are more mature in their data analytics can "increase the velocity of business innovation cycles. It also means those competitive advantage windows are likewise shorter and shorter," says Woollacott.

These leaders have done the hard work over time to create a foundation for extracting exponential value from their data. And that value does accrue over time, says Shimmin, as leaders address "a multi-pronged, multi-year problem that demands both the right technology and culture to make data the primary means of driving and deriving value."

A Call to Action

The results reveal that the leaders' efforts to facilitate the connection of data points across a variety of assets and services, their early adoption of real-time data analytics and AI-enabled automation, their investments in multi-cloud, and their measurements of the business impact of their data investments are all worth the effort.

"Leading CIOs have been on a digital transformation journey over the past few years with the goal of data unification, and their companies are replatforming and putting in not just new technology but also new data governance structures," says Vesset. "These are multi-year efforts."

It's clear that all organizations will need to prioritize the data-to-value imperative, emulating the work that these leaders have done, if they want to continue to compete in the years ahead. "The velocity of change is only going to accelerate in the digital age," says Woollacott. Developing a strategy and platform for transforming data into exponential value and training the labor base to leverage that data, he adds, is "how we ensure that humans can keep pace with this rate of innovation and change."

METHODOLOGY AND PARTICIPANT PROFILE

A total of 311 respondents drawn from the HBR audience of readers (magazine/ enewsletter readers, customers, HBR.org users) completed the survey.

SIZE OF ORGANIZATION

35% FEWER THAN 500 EMPLOYEES

18% 500 – 999 EMPLOYEES

34% 1,000 – 9,999 EMPLOYEES

13% 10,000 OR MORE EMPLOYEES

SENIORITY

52% EXECUTIVE MANAGEMENT/ BOARD MEMBERS

26% SENIOR MANAGEMENT

16% MIDDLE MANAGEMENT

5% OTHER GRADES

KEY INDUSTRY SECTORS

20% TECHNOLOGY

13% MANUFACTURING

10% BUSINESS/ PROFESSIONAL SERVICES

9% FINANCIAL SERVICES

9% CONSULTING SERVICES

ALL OTHER SECTORS LESS THAN 8% EACH

JOB FUNCTION

33% IT

14% GENERAL/ EXECUTIVE MANAGEMENT

9% CONSULTING

ALL OTHER FUNCTIONS LESS THAN 8% EACH

REGIONS

41% NORTH AMERICA

25% EUROPE

19% ASIA/PACIFIC

7% MIDDLE EAST/ AFRICA

7% LATIN AMERICA

Figures may not add up to 100% due to rounding.

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