



► Preparing people, processes and technology for strategic data management

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This reference guide provides employers' and business membership organizations (EBMOs) with guidance to help prepare their people, processes and technology to become a data-driven organization. It supplements the ***Guidance for Employers' and Business Membership Organizations to Position and Use Data as a Strategic Asset*** handbook.

► What are the benefits from becoming a data driven organization?

EBMOs can become data-driven organizations when they make decisions based on evidence, in contrast to more intuitive or instinctive decision-making. Data-driven EBMOs intentionally collect and analyse data, in line with their mission and vision to make decisions and provide high-quality services to members. These EBMOs thus experience benefits and opportunities at the strategic, organizational and operational levels, as the following explains.

At the strategic level, a data-driven EBMO will improve planning and decision-making through data analysis that identifies opportunities across departments, units or divisions. For example, it can launch new services according to data collected (such as members' feedback). It can also grow its influence, credibility and reputation through effective data use. For instance, an organization can ensure that lobbying and advocacy efforts are evidence-based to be more influential.

At the organizational level, a data-driven EBMO will improve its performance by quickly detecting and understanding problems when they arise and making informed decisions to resolve them. It will use data to communicate its distinct value proposition and achievements to current or

potential members and other stakeholders. This will help the organization expand its membership and establish new or stronger partnerships.

At the operational level, a data-driven EBMO will improve its impact from services by measuring progress and setting performance goals for different roles and/or activities. Additionally, it will improve staff capabilities and knowledge by integrating frequent data collection and analysis into job responsibilities.

► How to prepare people, processes and technology to become a data-driven organization?

EBMOs can improve their organizational capabilities by taking full advantage of new opportunities arising from managing data as a strategic asset. It is important to consider the relationship between people, the processes and technology to conduct changes in data management practices that are sustained over time.

For this reference guide, "people" refers to the staff who conduct the work; "processes" refer to the steps or actions to achieve desired goals; and "technology" refers to the tools to implement processes. The following guidance can help to manage these three elements to use data strategically.

People

Organizational change can be disconcerting for leaders, managers and staff, all of whom may worry about the security of their position or their ability to work in new ways.

CEOs and board members have a role in bringing all staff on board with using data strategically. They should lead by example – “walk the talk” – to encourage staff at all levels to support this organizational change towards valuing and using data more effectively. They can lead this change by:

- ▶ Recognizing that the change is needed and articulating the most important reasons to change the current data management practices.
- ▶ Clarifying why data should be collected, analysed, stored, shared, retained and retired carefully and systematically and communicating these reasons to staff.
- ▶ Explaining how changes in data management practices could change job responsibilities so that staff are informed and engaged in conducting this change.

Processes

Formal, documented and well-structured processes provide a solid structure to changing data management practices. They help achieve standardized outcomes, which helps with the long-term sustainability of changes in data management practices. EBMOs should consider the following advice when designing and implementing processes to become data-driven.

- ▶ Write down guidance or instructions to manage data in formal documentation (guides, procedures) that are regularly updated. Such documentation is useful to help staff understand how they fit into a particular process, what their role is and what is expected from them.
- ▶ Provide staff with capability-building opportunities in data management. Periodic or frequent trainings are useful to foster staff skills and abilities.
- ▶ Measure progress in data management practices across departments, units or divisions. Processes should have clear metrics that can be measured and compared over time. Ultimately, these metrics are useful to monitor changes in the data management practices across departments, units or divisions.

- ▶ Review, improve and adapt existing processes and create new processes to manage data, as needed. This will help ensure that data management practices are systematically adopted across departments, units or divisions through job descriptions, the constitution and by-laws and internal policy and procedures.

Technology

Following thoughtful consideration of how people and processes interact, an EBMO should decide what technology or tools it needs to implement changes to become data-driven. For instance, digital data collection and storage tools (databases, customer relationship management systems, spreadsheets and the Qualtrics Platform) are useful to improve data-sharing and reduce information silos across departments, units or divisions.

It is key to select technology or tools that fit an EBMO's needs rather than investing in complicated or expensive tools that might not necessarily improve outcomes. Likewise, continually fostering staff skills to manage data is essential to make the most of technology that supports data management processes and the use of resulting insights.



Do staff at your EBMO understand the reasons for becoming data-driven? Are they ready to work towards managing data strategically? Find out by using the Transition Readiness Assessment tool, which is an online diagnostic to help EBMOs assess their readiness for significant organizational change towards using and managing data strategically.

Access the tool in the *Guidance for Employers' and Business Membership Organizations to Position and Use Data as a Strategic Asset* handbook.

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