

**THE
NEW DATA LEADER'S
PLAYBOOK**

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PLAYBOOK

Strategies for Delivering
Game-Changing Results

NASHEED SABREE

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Nasheed Sabree
nsabree@rowerconsulting.com
www.rowerconsulting.com

The New Data Leader’s Playbook, Nasheed Sabree — 1st ed.

CERTIFIED



WRITTEN
BY HUMAN

TESTIMONIALS

***Renu Gehring, Chief Data Scientist, Ace-Cube, LLP &
Lecturer, Biostatistics & Epidemiology University of
Massachusetts Amherst***

"Rower is a leader in helping companies, functional, and IT teams effectively harness the power of data to create actionable insights. I have had the privilege of working with Rower in general and Nasheed Sabree in specific for the last 6 years and I can say with confidence that Rower is unparalleled at co-creating and implementing solutions that yield data insights. Rower's resources are top-notch IT specialists, data engineers, and visualization specialists. Give them a concept or a problem and they will not only co-create the best solution but also upskill your teams so that everyone learns and wins."

**Tom Nolan, Sr. Development and Construction
Services at Chick-fil-A**

"Nasheed is a valued business partner, who is also passionate about mentoring others. In his book, Nasheed offers strategic and practical advice to new data leaders to help set them up for success in their new journey."

**Chad Sims, Director, Omnichannel & Loyalty,
Blaze Pizza**

"This is the playbook you wished you had at your next great work transition, whether entering a new company or the next phase for your current organization. Nasheed brings his experience operating inside and outside many organizations to thoughtfully lay out the foundational components you need when entering new situations as a data leader looking to drive meaningful business results. The New Data Leader's Playbook provides real organizations' stories that I expect many readers will resonate with their journeys, and gifts checklists that can be revisited repeatedly."

***Roland Hoffmann, Unsung yet Highly Effective
Transformation Leader***

"Data and software are inseparable today. For those in data leadership, ensure software development and data engineering form a unified approach. Data often faces compliance constraints that create software dependencies, and overly rigid processes can lead to poor outcomes."

DEDICATION

To my family- my greatest source of strength and inspiration.

To my parents, for their unwavering belief in me and the values they instilled.

To my wife and children, for their love, patience, and support as I pursued this journey.

And to every leader striving to make sense of complexity and unlock the power of data- this book is for you.

Nothing is impossible when you approach challenges with clarity, courage, and conviction. Embrace the complexity, lead with purpose, and trust that every obstacle is an opportunity to create something extraordinary.

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INTRODUCTION

Taking on a new leadership role means proving yourself and making a splash in your new position that will make stakeholders take notice. Securing support for your goals and figuring out the best way to bring your initiatives to life are just a few of the challenges you're facing.

A data leader is much like a football quarterback who becomes a coach. You may have earned your opportunity by excelling at your previous role, but now you're operating from a completely different perspective—a better one. You can look over the entire field from your vantage point on the sidelines.

But what strategies does your team need to excel? How should you build or adjust your team to help them perform at their best and help bring your initiatives to life?

You're seeking the clarity you need to make the right decisions. You want to know that you're heading in the right direction, with the right strategic plays, and on the right timeline for delivering results.

I've filled this book with insight from 15+ years of working with 50+ data leaders from some of the world's most influential companies across industries spanning healthcare, finance, retail, and technology. You'll find real-life stories and time-proven plays you can use to help your team fulfill your initiatives. You'll have the tools you need to build a clear roadmap to success under whatever circumstances you've taken on in this leadership role.

After you've read this book and used the tools inside to solve a few of the more immediate complex problems you're facing, you'll know what path to take forward. You'll understand how to get your projects executed strategically. You'll identify the tools and expertise needed to deliver exceptional results and meet the high expectations of your stakeholders.

Stepping into a leadership role isn't a reward for past success—it's a bet on your ability to handle what's next. Your hard work got you here, but this is your chance to

prove you belong. Now, you will be faced with guiding a team through new challenges to meet your strategic objectives, all while keeping leadership informed along the way. You can choose to absorb the valuable insights inside this book to navigate your current challenges and deliver value without all the guesswork that comes with your new role. You can lean into the real-world, time-proven strategies inside.

I'm Nasheed Sabree, founder and CEO of Rower Consulting, a Strategic Data Advisory Firm. Too often, we see leaders struggling to please stakeholders and elevate their careers when the tools to do this profitably and efficiently are within their reach. This book is to give you insight on which strategies will help you in your leadership role and assist you in making the right next-step decisions.

I've spent years in the trenches with data leaders across industries, tackling high-stakes, complex projects that deliver significant business value and demand flawless execution. From hiring the right talent to managing time effectively, building strong teams, and turning strategies into tangible results, I've faced and solved the kind of challenges that keep leaders up at night. I'm here to share

the hard-earned insights that will help you not just manage your new responsibilities but excel at them.

First, we'll start by looking at the challenges and responsibilities you will face as a new leader. In the chapters to follow I'll provide practical strategies to position you and your team for success. I look forward to meeting up with you at the end of the book. Let me know how it helped you be successful and what other tools or expert help you may need to fully achieve your initiatives.

CHAPTER 1

A Shift in Dynamics and Perspective

“The most difficult thing is the decision to act, the rest is merely tenacity.”

-Amelia Earhart

If you're reading this book, chances are you've recently stepped into a leadership role, taking on a new set of challenges and expectations. Perhaps you're a Senior Director of Enterprise Analytics, a Director of Consumer Insights, a Data Science Manager, or a Vice President of Marketing Analytics. Whatever your title, the essence of your role remains the same: you're tasked with driving the business forward by extracting actionable insights from data. The information you provide will help your organization make important decisions about everything

from improving operational efficiency to how to increase overall revenue. Your ability to deliver on this is critical, not just for the organization's success but for your own career trajectory.

At some point, you were likely recognized for your technical insight and problem-solving abilities. As a result, you were asked to step into a bigger role. Whether that happened yesterday or a decade ago, that transition brought with it a new level of complexity. This new role demands more than just technical expertise; it requires you to navigate the intricacies of people management, influence decision-making at the highest levels, and continually innovate in a rapidly changing environment.

The strategies that once served you well as an individual contributor might not be as effective today. Suddenly, you have to get up to speed on current developments and technologies. You may have been a technical professional before, where you were the expert in a particular area. As a leader, you now need to understand much more across a wide range of specialties. This puts even more strain on your role and challenges your ability to continually develop, stay educated, and lead effectively. At this point, you may be facing one of two scenarios.

Scenario 1: Stepping Into a Leadership Role With Little to No Guidance

In this scenario, you've proven you can add value as an individual contributor. You've honed your technical skills and developed what you believe are the necessary soft skills to inspire and drive organizational change. You may bring unique strengths, aspirations, and values that align with the business. But the truth is that stepping into a leadership role requires more than just individual excellence.

As a leader in this position, begin with a period of observation and learning. Instead of rushing to solve problems, focus on understanding how the organization functions. Meet with different leaders across various functions and departments to gather insights into both the challenges and opportunities facing the organization. Lean on your past experiences to navigate your new environment. Sometimes, these past experiences are beneficial, but other times, they aren't, particularly when transitioning into a new industry.

At this point, the pressure is on to make a good impression quickly, often within the first 50 days. Start to map out a course of action, define initiatives, and set goals for what

success looks like. Brainstorm ways to drive change and move the business forward. This will require you to roll up your sleeves to create a prioritized roadmap with each initiative tied to business value. By business value, we're literally talking about dollars and cents. How much money are you helping to make or save? As you attempt to prove your value through tangible results, don't think in terms of technical execution. It's normal to do so; you're used to being on the field, but you're a coach now.

When it's time for execution, it's your time to ask for more resources, like funding for new tools, technology, employees, or contractors. Lean on their skills and let your team build what you need, while you focus on showing the value. As your team tackles specific tasks, make sure you have allocated appropriate timelines for delivery and be a staunch advocate for your team to shield them from unrealistic and sporadic requests. Of course, this process takes quite a bit of time. Don't underestimate the importance of marketing your efforts. You're a technical expert, so you are likely not a marketer by trade. As a result, you may struggle to advocate for yourself and your team effectively. Push through this discomfort. It will become easier.

Up until now, someone else has likely been the one to present your work to the executive team. But now you're in the spotlight and need to be able to tell a compelling story about your initiatives. Be careful not to allow the message to get lost in the technicalities during the presentation. Leaders who don't share similar technical expertise or knowledge cannot fully grasp the value of the work if it's not distilled to the most pertinent details. In the worst-case scenario, your presentation will fail to resonate with your audience, and your efforts will be overlooked or misunderstood, leaving the organization wondering about the value you can deliver.

In many cases, reactions vary even if you can get your point across. Some members of leadership are naysayers, others are skeptical, and others are hopeful. What you really need is a sponsor within the executive team—someone who believes in your vision and is willing to advocate for the resources required. But at this stage, all you may have is a roadmap, a few slide decks, and maybe a proof of concept (POC) that you hope whets the appetite of the decision-makers so you can get further investment.

Scenario 2: Stepping Into a Leadership Role With Misaligned Expectations

Now, consider a second scenario: stepping into a leadership role with some direction but where the expectations are misaligned. You are given a clear mandate in this situation, but something about the current approach doesn't sit right with you. Maybe you know explicitly or intuitively that the organization's strategy is flawed, or you lack the necessary resources to execute the plan. In some cases, the organization may simply be moving in a direction you aren't comfortable with.

For example, there was a leader who transitioned from a government-funded research organization to a private equity-run company. The new role demanded rapid scaling to prepare the company for an eventual exit. He inherited a poorly built web application and was expected to onboard multiple new brands quarterly. This app was supposed to be automated and scalable, but it was merely a "cardboard facade." It looked good on the surface but lacked the desired functionality. A team of engineers had to keep it running manually, creating a stressful situation where his job depended on keeping this flawed system operational.

The organization had adopted this application as their North Star, but it was far from reliable. He needed to quickly course-correct without dampening the enthusiasm of the business, as their excitement was behind this tool. He had to make sure the tool actually delivered on its promises. In the realm of data analytics and visualization, getting buy-in from users is half the battle. While there may be initial excitement, true buy-in means usage. Within this organization, executives judged performance based on the utilization of the tool. While users were present, the business value was absent.

The leader needed a partner who could not only handle the data engineering but also improve the overall user experience so that the application would be insightful and actionable. He also needed a partner who could update the architecture to make it scalable and performant. The application was prone to breaking and required manual intervention, making it unreliable and not very helpful in providing actionable insights for the business. So, in this case, he stepped into a challenging role, inheriting a flawed system that the organization depended on, and had to quickly find solutions to make it work effectively.

Effectively Shifting Your Perspective

Both scenarios emphasize the shift in dynamics and perspectives that come with stepping into a leadership role. As a technical expert, your value was measured by the quality of your work and your problem-solving abilities. However, as a leader, your success hinges on your ability to influence others, manage resources, and align your team's efforts with the broader goals of the organization.

What if it was possible to be both the technical expert and the leader without giving up anything? What if you could tell a moving story that aligned with organizational goals and garnered the support you need with no problem? With that kind of support, you could execute projects in a timely manner. You could build recognition and trust in your organization. After all, that kind of success leads to more projects, more opportunities, and an ever-expanding scope of influence.

In the chapters that follow, we'll explore strategies for mastering data leadership in this new, more complex role. We'll look at how to set yourself up for success, apply analytics and data science, position the value of the work

so it grabs your leadership's attention, and much more. Whether you're stepping into a leadership role for the first time or looking to refine your approach, this book will provide you with the tools and insights you need for long-term success.

Using This Playbook

In this book, we draw parallels between a data leader and a high-level athlete transitioning into a coaching role. Just as an athlete once had direct control over the game and what happened on the field of play, a data leader may have excelled as an individual contributor. Now, as a coach, they must shift their focus to orchestrating overall strategy, managing personnel, and making critical staffing decisions. They are responsible for aligning their team, making tactical decisions, and collaborating with upper management to ensure they have the resources and support needed for success.

Great coaches, like data leaders, must navigate challenges such as limited budgets or imperfect team dynamics. Even when they inherit less-than-ideal players, they find ways to build strong teams around them, optimizing strengths

and minimizing weaknesses. This book aims to equip these leaders with effective strategies/plays to manage their teams successfully, ultimately ensuring the long-term success of their organization.

CHAPTER 2

Setting Yourself up for Success

“Success depends upon previous preparation, and without such preparation, there is sure to be failure.”

-Confucius

When Your Team Succeeds, the Franchise Succeeds

Over the last decade, data leadership has undergone a transformation, requiring new skills, tools, and strategies to successfully lead and deliver high-impact projects. The principles you know may be sound, but the technical implementation may have shifted drastically. To succeed, you need to stay ahead of the curve. While your previous role may have been deeply technical, the skills you

mastered and the tools you relied on were likely specific to that role—or even a different industry. With the rapid evolution of technologies and the shifting demands of leadership, this book is here to help you bridge the gap, sharpen your skills, and make a meaningful impact in your current role.

You performed well in your roles before becoming the data leader, impacting results directly, just as the quarterback on the field has his hands on the ball. Now, you're like that quarterback turned coach, directing from the sideline to orchestrate offensive and defensive strategies.

It's a significant shift in responsibilities and focus with you as the "coach." Now, you have to work with management to ensure you have the proper budget allocation and proper resources available to develop the talent to deliver winning results.

The greatest coaches are able to find ways to be successful, even in situations where budgets are constrained and where they don't have the right talent. You may have inherited people who are not ideal players in their positions. Great coaches are able to bring in strong players around those players to help hide certain weaknesses and to enhance the

capabilities of the overall team. Coaches who are able to do this are often labeled “geniuses,” “savants,” “masterminds,” etc. We want you to find your way to the “genius zone” for coaching data teams.

Developing Your Game Plan

As the quarterback turned coach, you have to design a new game plan (strategy) for your team. The benefit to having a playbook such as this is that we will give you plays your team can execute flawlessly. That takes everyone being on the same page. The ownership group (C-suite) sets the vision, managers act as the coaches guiding execution, and the staff are the players making it happen. In the corporate world, that alignment often extends beyond the internal team, requiring you to bring strategic vendor partners and other stakeholders into the fold to achieve your goals.

The Data Leader’s Checklist

The Data Leader’s Checklist is one of the first tools we give to the data leaders we work with over the first 50 days. As a new coach coming in, it’s very important to set the culture of the organization from day one. Outline the plan, work with management to be aligned in terms

of strategy, explain your system, and recruit your assistant coaches and players.

- **Understand the personnel.** What employees do you have that can assist your initiative?
- **Gain buy-ins through early wins.** You always have to show up and prove yourself to get an increased level of confidence from your stakeholders.
- **Identify and understand the budget.** What are your budget limitations and constraints?
- **Develop strategies to advance your agenda** and create a culture of winning, even in the face of obstacles.

This book will show you how to effectively navigate different scenarios and find solutions. Sometimes, there will be definite plays or actions you can take. Other times, it will help you determine what type of supporting roles you need to bring in to help you meet your goals through the various challenges you may face, such as:

- You cannot hire full-time resources.
- You inherit legacy systems that you need to make perform better.

- You need to extend the life of legacy software or web applications, and you don't have developers on hand.

Game Management

You have 50 days to put your game plan together and make an impact with your role as the data leader. Once the clock starts ticking in the first 50 days, you have to prove yourself by:

- Managing the time.
- Managing the situations.
- Communicating effectively with your team and partners so that everyone is able to move in lockstep toward the goal.
- Celebrating accomplishments with your stakeholders and the players.
- Holding people accountable.

First, you need to rank your company on a scale of 1-10 with an assessment of competencies and capabilities to identify and assess gaps that need to be filled.

Second, you want to prioritize and scope initiatives based on expected business value, which takes understanding the organization's return on investment.

ROWER: Results Only Work Environment Reimagined

At Rower Consulting, we have an established, systematic process that we take all data leaders through during this first 50-day period. It's the ROWER EDGE FRAMEWORK. Below are the key elements that this framework takes you through. We'll go deeper into details with takeaways throughout the book on each.

- Automate—Validated and Trusted Data Pipelines
- Creative Exploration of Must-Know Questions and Answers, Plus Nice-to-Know Questions and Answers
- Secure Data Assets With Clear Documentation/Governance/Lineage
- Enrich Data With Third-Party Data and/or Web Scraping
- Human-Centered Design of Analytics Tools (Dashboard, Reports, Products, Platforms)
- Embedding AI Into Analytic Systems (Intelligent System Design)
- Change Management

- **Data-Driven Storytelling—Presenting Delivered Value to Leadership**

What's Next?

The following chapters are going to approach each subject from two different perspectives, as we find that data leaders are entering their roles from two different angles. No matter which situation fits you, we'll supply you with what you need.

Some data leaders are completely aligned with management from the outset and understand the projects they must tackle. They understand the company's vision, and they're aligned with it. They have the support of leadership behind them so they can implement their strategies. In this case, you may have more budget allocated to your initiatives early on in your leadership journey. We'll cover scenarios when you have a budget and when you don't. When you have a team, and when you do not.

Other data leaders step into organizations without a strong data culture, where impactful projects are unclear. In these cases, you have to build the groundwork from scratch: defining a clear vision, securing leadership support, and

fostering collaboration to bring data-driven initiatives to life, all while navigating potential resistance from upper management. As a result, your budget may be limited. There may be internal dysfunction that you have to overcome in the midst of trying to guide the team toward a more winning culture. In some cases, the organization may have faced significant setbacks or lacked clarity on what should or could be done. Your role is to rebuild trust in data, redefine possibilities, and establish a culture focused on achieving meaningful, sustainable success.

In Chapter 3, we will go into strategic planning. Precise alignment with the organization's vision, mission, and desired outcomes is essential. Ensuring that every strategy aligns and integrates seamlessly with the company's overarching business objectives is critical for achieving meaningful impact and lasting success.

CHAPTER 3

Strategic Planning

“Execution is the ability to mesh strategy with reality, align people with goals, and achieve the promised results.”

-Larry Bossidy

You may have discussed the business goals and the system you want to use in the interview prior to landing your leadership role, but now you have arrived at the organization, and you have your office. It's time to make sure there's clarity, alignment, and understanding of the core business needs. You're going to need to create a clear roadmap: making strategic decisions and trade-offs, aligning goals with business strategy, and effectively prioritizing and scoping projects.

Each project should begin with the $X \rightarrow Y \rightarrow Z$ Framework. The $X \rightarrow Y \rightarrow Z$ Framework provides a structured approach to connecting actions to outcomes and quantifying the resulting business value. The process begins with **X**, identifying the specific initiative or solution to be implemented. For example, automating manual reporting processes can be a clear, actionable step. Next is **Y**, the anticipated outcome of the action. In this case, automating reporting could reduce manual reporting time by 50%. Finally, **Z** represents the measurable impact of the outcome, such as freeing up 40 hours per month, which translates to \$40,000 in annual cost savings or reallocated productivity toward revenue-generating activities.

To apply this framework effectively, start by identifying key business objectives. Your initiatives should align with critical organizational goals such as revenue growth, cost reduction, operational efficiency, or compliance. Once objectives are clear, estimate outcomes based on known metrics. For example, if a manual process currently requires 10 hours per week and automation reduces it to 2 hours, the time savings would be 8 hours per week. Assign a dollar value to these time savings based on an hourly rate for the resource(s) that performed this task. In many cases, multiple resources are involved and this must be accounted

for when assigning a dollar value to quantify impact. This process is an art and a science. Leadership's participation is critical to arrive at agreed upon quantifiable business value.

Next, translate these outcomes into measurable business terms. Savings in labor hours can be quantified as cost reductions, while improved system uptime might lead to increased revenue opportunities. Assigning a monetary value to each initiative will inform your prioritization of projects based upon projected business impact. Low value projects or projects that are difficult to quantify the business value may not be worth pursuing. Lastly, validate and refine your estimates by cross-checking calculations with stakeholders or historical data. This step not only ensures alignment with leadership of projected business value, but it also builds credibility for your proposed initiatives. By following this structured approach, the $X \rightarrow Y \rightarrow Z$ Framework allows you to articulate the monetary value of your actions in clear, quantifiable terms, making a compelling case for leadership support. This makes it easier to measure your impact as a leader and quantify your success over time.

Why Do You Need a Roadmap?

Talking only gets you so far in this “show-me” world. Executives want to understand that you’ve thought it all the way through and that you have a clear plan to deliver results. And the most popular form of show and tell is through a slideshow presentation. You need to show leadership clearly what you plan to accomplish and what types of resources you need—how many you need and how much it’s going to cost. You want to use clear deliverables along the way connected to the business value and objectives that have been outlined. The financial investment of time and resources should be measured against the monetary value you anticipate delivering. Sometimes this value will need to be calculated over months or years to properly assess the impact. When you go through this exercise, it’s going to get you much further. I’ve seen leaders get hung up for weeks because the executive team did not understand or believe what they were presenting. So, this is a critical step to execute before you can even do anything else. Your strategic roadmap will help you avoid celebrating a short-term win that could be a long-term setback.

The Four Elements Of Your Roadmap

Your roadmap is going to focus on four key sections: Team, Budget, Data Sources, and Stakeholders/Partners.

Section 1: The Team

Operational readiness and prioritization depend upon the organization having the personnel necessary to implement the initiatives. Do you need to go out and hire a data scientist, a data engineer, a visualization developer, or a product owner, or do you need to upskill your internal resources?

Regardless of the “how,” you “must” foster a high-performance culture. You set the tone from day one. In order to do this, you have to build strong, cohesive teams and have a system for mentoring and managing this talent. You need to challenge them where they may not be the most comfortable and encourage them to be able to learn new skills or to sharpen the skills they already have.

Below are two scenarios you may encounter. Choose the checklist that fits your scenario.

Checklist #1: I am inheriting a team already.

Who are the players? Employees, vendor partners, software partners, third-party data partners? Who is the executive team you report to?

What systems are they accustomed to? Is the system they know in line with your system?

- If yes, you're good to go.
- If not, can they learn your system? Can you prove your system is effective?

What do you need to implement your system?

- Do you need new technology?
- Do you need consultants or contractors as experts?
- Do you need new software?
- Do you need third-party data?

Checklist #2: I am building a team from scratch.

You have no resources, so you have to recruit.

As you recruit your team, answer this question: Is the system they know in line with your system?

- If yes, you're good to go.
- If not, can they learn your system? Can you prove your system is effective?

What do you need to implement your system?

- Do you need new technology?
- Do you need consultants or contractors as experts?
- Do you need new software?
- Do you need third-party data?

The Importance Of the Team Section:

As you shift from thinking like a player to thinking like a coach, your answers can help you see where there may be some issues. You have to ensure those weaknesses are shored up intentionally through training, professional

development, management, and mentorship. This will create a culture of innovation and accountability.

You have to identify what additional workforce and team members are needed. If you need experts to help support your team, you bring in high-impact consultants and contractors. If you need better systems and software, you bring in better databases or bring in talent that can enhance and optimize the databases you currently have.

Section 2: The Budget

There is always a cost associated with a decision that goes beyond the actual dollar amount. If you don't have a budget and you go cheap to get a resource who creates more technical debt, you're just digging a hole. If you hire inexperienced consultants to do technical work, you're prone to build something that is not architected very well, and that winds up digging you a deeper hole as well. Be sure to understand the difference between "management consultants" and "technical experts."

This distinction is very important and can be the difference between success and failure. Many leaders make the mistake

of wasting their budget on “brand name” firms that build poorly architected solutions. If you need strategy, hire for strategy. If you need to build working software, hire the best experts your budget will allow. Think of your budget, especially when limited, as an opportunity to invest in the opportunity that has the greatest upside or what is most likely to deliver the greatest value to your team and the business.

Some of the “plays” I’m going to share later in this book will help you overcome some of the budget obstacles you may find standing in your way.

Start by choosing the right scenario for your situation below for the budget considerations you should integrate into your roadmap.

Scenario #1: I have a budget.

Good. How much can you spend and what should you spend it on first? (All budgets are limited in some form.)

You have four options for spending your budget:

1. Employees
2. Software
3. Third-Party Data
4. Consultants/Contractors

Entering During the 1st Quarter

What if you're entering a stable environment where management is looking for a long-term impact? You're in the 1st quarter of the game then, and you can look to invest in employees. Which employees to invest in depends on what your team needs. Focus on hiring for the skills you and your team lack and need to execute the most critical, high-value business objectives. For example, if you're not good at project management, then consider hiring a project manager so your employees don't quit because of a lack of organization.

A combination of full-time employees and contractors (even if they are part-time), can be a game changer for your team. Most often when budgets are limited, a hybrid of engaging consultants/contractors with employees works best.

Entering During the 2nd Quarter

Once your team is in place, you need to evaluate your software, often called your “tech stack,” based on where you want to be at the end of your roadmap. What software you choose is critical to success. If you decide to use legacy systems, make sure you have “EXPERTS” to ensure you don’t run into unforeseen roadblocks. It’s why we work to see around corners at Rower Consulting. We want to always be able to find a way to be effective. Consulting with experts will help you understand the pros and cons of any and all software decisions. There’s no need to waste time or money on “new software” if the software that the company has will perform better with more experienced resources. Far too often, software is underutilized because of skill gaps of internal employees. Don’t blame software if it’s a matter of inexperience.

Entering During the 3rd Quarter

You want to make adjustments coming out of half-time. There’s a saying in the sports world that if the game is even/tied at half-time, the team that makes the best adjustments during the half-time break will win.

Don't be the type of coach that cannot adjust. Below are examples of adjustments that give you the edge:

- Third-party data to enrich internal data sources.
- Experts who can do more with the current software.
- Upskilling and challenging employees to learn new skills and do new things in their roles.
- Innovation.

The “game” may be close coming out of half-time. If you feel the “game is close,” you need to switch things up. This is when you need to find opportunities for “smart innovation.” This doesn't have to be a major change. It could be something as minor as improving a process, delivering a capability in development to users earlier than expected to get feedback for optimization, etc. You will be surprised by how communicating with stakeholders regularly will unlock new opportunities so you can innovate effectively and efficiently.

Entering During the 4th Quarter

Which of these four you select depends on the situation. The game has already started in many cases. If you join a team that has had years of losing seasons (turnover in

“coaches”), know that you’re in the final quarter of the game and your team is losing!

You need a big play ASAP, and you must hire expert consultants or contractors. These resources can be onboarded quickly and have deep technical expertise to deliver results efficiently. At Rower Consulting, we saved a Director’s job by delivering working software in three months that his team had been struggling to build for over a year. Expertise matters.

The Journey Isn’t Always Linear

No matter if you come in at a critical point towards the end of the “game” or at the beginning, you need coordination between personnel, data, and systems. If you struggle in one of these areas, you must review performance in each phase to understand where you can improve, where your team can improve, accept responsibilities, and make adjustments. Executive leadership understands you won’t win every game. If you show you understand why you lost, make adjustments, and have a winning season (more wins than losses), then you will likely keep your job at a minimum. If you win way more than you lose, chances

are you will enjoy more growth and success professionally and financially.

Scenario #2: I have absolutely no budget and no team.

In this case, you're a glorified individual contributor, not a coach, even if you have a title.

If you want to be successful, you have to prove you can be resourceful. Tackling small, short-term proof of concepts to show improved value can help here. You have to strategically invest so you can make progress versus leaning on the excuse of not having a budget.

The best play here is to use internal resource allocation. Find the resources on other teams that can allocate time to support your initiatives—nothing about the framework changes. From here you operate in anticipation of budget and resources. You will be able to find the budget, in other words, have the budget reallocated to your initiative, even if it is minimal. With the right resources, you can deliver outsized value even with a “small budget.”

At Rower Consulting, we have helped clients turn small budgets into large budgets. The key is to understand the “business value” your initiative will deliver. Once you have alignment with your leadership, you will need a resource to help deliver this value. After the initial proof of concept is delivered and the business sees momentum, you will have an opportunity to ask for resources to continue the development and maintenance. The key to this process working successfully is to present the value your initiative is creating to leadership. Chapter G goes into detail about this..

What Makes Having a Strategic Budget Plan so Important?

The strategic use of the budget, whether it’s limited or expansive, will allow you to show that you are creating a culture of innovation, accountability, and success. It will build confidence from the executive ownership and build credibility and confidence from your players.

Section 3: Data Sources

This is where you’re planning for the technical implementation phase. You’re going to figure out what data

assets you have available. You want to understand where the data is housed and what you're trying to accomplish so you can see how to bring all that information together.

You want to build your system around effective data management. Identify your key data assets early! Ensure the systems to produce this data are automated, and the data pipelines are free of errors. Provide self-service reports that are validated. Establish project management and get organized! Everything else will build upon these fundamentals.

What is your system? (See above in the first section for building your team and answer those questions.)

Did you land this job without a system? That can be a good thing. The information in this book will give you guidance on how to navigate and develop your own system. Bringing in a partner to help design your system is one of the most important first steps you can take.

Section 4: Stakeholders and Partners

Who are going to be the resources for your initiative? Are they partnerships across the different departments? What

partners are champions for your initiatives? Who will help you make sure the value is delivered?

You want to have specific names like [this particular person], the director or senior manager of [this]. They've agreed to do these things. So you have to do your homework before that. And then you want to understand how much it's going to cost the business. Much of this happens, as you know, around the time when you're advocating for more budget.

Crafting a Compelling Narrative

Your roadmap is more than a plan—it's a story of how you'll transform the organization. Clearly articulate the value of your initiatives, backed by sound data and actionable steps. Show that your approach is intentional, strategic, and aligned with the organization's goals.

With clarity, collaboration, and execution, your strategic roadmap will set the foundation for success, helping you drive meaningful outcomes and build trust across the organization.

CHAPTER 4

Technical Implementation Of Fundamentals — Executing the Plays

“Football is two things. It’s blocking and tackling. I don’t care about formations or new offenses or tricks on defense.”

-Vince Lombardi

X’s and O’s Of Data Projects

In both football and data, success comes down to the basics—blocking and tackling. Without mastering these fundamentals, you’re bound to fall short. I’ve broken down five key fundamentals here, laying out the playbook to execute them effectively. Like a coach on the sideline, you have creative, game-changing strategies at your disposal

to position your team for success and lead the business toward victory.

Automation Fundamentals (Eliminate Manual Processes)

Automating data retrieval processes is a game-changer for modern data leaders. It accelerates the flow of information, eliminates inefficiencies, and drastically reduces the risk of manual errors that can derail critical decisions. By automating these workflows, you free your team to focus on high-value tasks, adding time, precision, and confidence to your operations.

For leaders under constant pressure to deliver results, automation isn't just a technical improvement—it's a strategic imperative. When data flows reliably and accurately, decision-making becomes not only faster but also more informed. You eliminate the need for endless checks and rechecks, building trust in the systems and the insights they produce.

Think of it like coaching a high-performing team. Just as athletes rely on a solid game plan to win, organizations depend on reliable, real-time data to stay competitive.

Without this foundation, every decision feels like a gamble. Automation is the play that ensures your data is always game-ready, empowering your team to execute with precision and confidence.

The goal is simple but powerful: to move beyond reactive firefighting and create an environment where data drives proactive, strategic action. By investing in automation, you set the stage for transformative growth—turning data into a trusted ally that leads to smarter decisions and better outcomes.

Creativity and Extracting Value From Data

The next crucial step in data projects is moving beyond simply reporting on what happened to delivering actionable insights—proactive, forward-looking perspectives that explain why things happen and what will happen next. These insights uncover the data that influences the levers the business can pull to drive meaningful change. Actionable insights are about more than presenting information; they're about enabling action.

Every project must begin by asking, What action will this insight enable? How will it improve operations or

outcomes? Why does this matter? Questions like “So what?” and “If we knew this, what could we do, should we do, or would we do?” This ensures that the data project serves a purpose that is directly connected to delivering an actionable capability. Combined with automation, this approach ensures insights are continuously accessible and tied directly to decisions that maximize business impact.

In this step, the team focuses on uncovering the critical questions that must be answered to address key business challenges—these are the must-know questions. Alongside these, the team also identifies nice-to-know questions that, while not essential, could provide valuable insights to enhance understanding and decision-making. This process involves exploring the data we already have access to and brainstorming the additional data we’d like to access to answer these questions. For instance, at a home builder client, we wanted to understand competitor pricing for new homes. We had our own pricing data, purchased incomplete third-party competitor pricing data, and identified a website with the missing information. By asking, “If we had this data, what could we do?”, we envisioned new possibilities and then figured out how to get the data—through enrichment of internal data and web scraping, solutions we’ll cover in this chapter. This

exploratory step sets the foundation for gathering the insights that drive maximum impact.

Enrichment Of Internal Data

Some of the most actionable insights in data projects come from combining internal and external sources. By enriching internal datasets with third-party data or leveraging web scraping to extract valuable information from websites, you can unlock deeper, more actionable insights. Third-party data is often available for purchase from vendors, while web scraping enables you to gather external data directly from public websites.

Enriching internal data can be approached in two key ways: purchasing third-party data or using web scraping to gather it yourself. Third-party data providers offer excellent datasets tailored to specific industries, providing a convenient and reliable option for data enrichment. However, when budgets are tight or the specific data you need isn't available for purchase, web scraping can be a powerful alternative.

Web scraping requires technical know-how and execution, as some companies work to prevent their website being

built scraped. In those cases, workarounds may be necessary to access the data you need. For example, at a large CPG client, we built a team to automate the web scraping of major online retailers. This effort was not trivial—it required careful planning and technical execution to scale—but it unlocked a valuable strategic advantage and introduced a new capability that enhanced their competitive edge.

By leveraging both approaches, you can enrich your internal data in ways that drive deeper insights, expand possibilities, and create measurable business impact.

Human-Centered Design

The Human-Centered Design play is all about using user research to create tools tailored to the needs of your target personas. If you skip this critical step when developing dashboards, reports, or other tools for the business, your chances of delivering something stakeholders will actually use drop significantly. You risk contributing to the ever-growing graveyard of unused dashboards and reports—an outcome often caused by failing to understand the real needs of the business. This is the root of dashboard sprawl: poorly designed tools that miss the mark.

Your move here is to put the user front and center. Design dashboards, reports, and tools that are intuitive, easy to use, and directly aligned with the needs of every stakeholder—whether it’s a VP, director, manager, or analyst. Stratify these personas by department—finance, sales, marketing, HR, and more. Each group has unique requirements, and while no single tool can work for everyone, thoughtful design can address the needs of multiple users effectively.

To get this right, invest in:

- UI/UX research and development
- Dashboarding and reporting best practices
- Right tool, right place principles
- Designing dashboards that work

When tools are built with people’s needs at the core, they’re more likely to be embraced and used effectively. This results in better decisions driven by data and, ultimately, greater business success.

Your Strategic Game Plan

Each of the strategies in this book work like a football play to win the game. Keep this book handy as a good

reference guide when you need to make a strategic play in your leadership role.

If you're left in a crisis situation where you need expert help, the Hail Mary Project Save is the strategic play you need.

“Last-Second Rescue: The Hail Mary Project Save”

The “Hail Mary” play is a football term for a desperate, last-second play designed to score when time is running out. In this context, it represents bringing in a top-quality consulting expert as the go-to solution when a project has gone off the rails, and immediate expertise is required to save the project and the client's job.

When projects are off-track and time is running out, it's time to get an expert to step in and save the project. Expert solutions that address scope creep, budget overruns, and technical debt are the tools you need the most.

These quick, effective solutions save the project and restore confidence in leadership, preventing critical failures.

When projects spiral out of control, deadlines loom, and leadership is on the brink of losing credibility, Rower Consulting is the go-to partner for pulling off the ultimate “Hail Mary” play. With deep technical expertise and an unparalleled ability to deliver under pressure, Rower Consulting consistently transforms a crisis into a success story. (See our case studies at the end of this book for real instances of how we did this for our clients.)

Visit <https://rowerconsulting.com/> for more information.

CHAPTER 5

Analytic Applications — Advanced Play Calling

“Information is the oil of the 21st century, and analytics is the combustion engine.”

-Peter Sondergaard

Analytic applications represent a fundamental shift in how organizations approach reporting and dashboards. They evolve traditional tools into intelligence systems that deliver actionable, persona-specific insights directly into workflows—when and where they’re needed.

Traditional dashboards, despite heavy investment, often fail due to poor alignment with user needs, leading to “dashboard sprawl:” an overabundance of outdated, disconnected tools with minimal business impact.

The issue isn't just the dashboards themselves but the lack of standards, user research, and integration into real-world workflows.

Analytic applications solve this by embedding intelligence into processes, prioritizing usability, and aligning insights with business needs. They transform how reporting delivers value, making them the future of impactful decision-making.

Introducing Analytic Applications

An analytic application is the tool your business needs when all they might know to ask for is a “dashboard.” It's a dynamic, web-based system designed to meet evolving business needs and drive a new way of working. These tools are living, breathing systems that adapt and grow with your organization, offering mobile capabilities because we're no longer tied to desktops in office environments. In today's world, insights and information must be accessible anytime, anywhere, empowering users to make decisions on the go.

When the business articulates requirements that point to a new operating model—one where information flows

seamlessly across silos and data directly informs action— they’re describing the need for an analytic application. These tools combine data, design, software development, and intelligent integration to create an entirely new data experience. They go beyond simply showing insights; they empower action, foster collaboration, and unlock possibilities that dashboards alone can’t deliver.

As AI becomes an integral part of business operations, the importance of analytic applications will only grow. These tools aren’t static; they’re designed to scale, evolve, and adapt to future business needs. They bridge the gap between disconnected systems and deliver a unified experience that informs decisions, drives innovation, and transforms how work gets done. Forward-thinking data leaders must always ask: Are we developing solutions for the future state of the business? Analytic applications answer that question, positioning organizations to thrive in an ever-changing landscape.

Bringing Clarity With Analytic Applications

One of our clients faced a fragmented data landscape. Insights were scattered across Tableau, Power BI, and Looker, forcing teams to navigate multiple platforms to

complete their daily tasks. The desire was to have a single platform for presenting insights for the business.

We solved this by creating an analytic application. This unified platform brings everything together in one interface, tailored to the needs of each team. Now, marketing teams access their Looker reports directly within the application, complete with a homepage highlighting key metrics. For commercial sales, the application delivers AI-powered insights like next-best-action recommendations, top customers, and call lists, all seamlessly synced with Veeva and Salesforce to track daily tasks. Enterprise analytics teams get their own tailored views, ensuring that every user sees only the data most relevant to their role.

With everything connected and streamlined, users no longer waste time hunting through multiple tools for the information they need. Analytic applications deliver fully integrated, role-specific systems that simplify access to insights and drive smarter, faster decision-making.

Web and Mobile Application Development

Creating effective analytic applications isn't just about building something functional; it's about making sure

it's user-friendly and ready for the future. To accomplish this, you'll need three components:

Web Application Development: Developing web applications involves creating intuitive, responsive interfaces that provide a seamless user experience. This includes designing layouts that are easy to navigate, ensuring that data is presented clearly, and optimizing performance to handle large volumes of data efficiently. Web applications should be designed to integrate smoothly with existing workflows and tools, providing a consistent and efficient user experience.

Mobile Application Development: With the increasing use of mobile devices, developing mobile applications that offer similar functionality and usability is almost required. Mobile apps should allow users to access essential data and insights on the go and ensure that they can make informed decisions anytime and anywhere. This involves designing mobile interfaces that are user-friendly and optimized for small screens while maintaining the functionality of the web application.

Future-Proofing: Both web and mobile applications must be designed with scalability and future-proofing

in mind. As data volumes grow and user needs evolve, applications should be able to accommodate these changes without requiring significant redesigns. Future-proofing involves using flexible architecture and technology stacks that can adapt to new requirements and advancements, ensuring that the applications remain relevant and effective over time.

Dashboards will continue to evolve into analytic applications as data leaders recognize this transformation is essential to deliver on the promise of actionable insights in a rapidly advancing technological landscape. The rise of AI has brought exciting capabilities, but siloed or out-of-the-box AI solutions will fail to address the unique needs of businesses. To meet these challenges, data work must adopt a model similar to software engineering.

Just as software teams maintain and innovate a single application over time, data work will require cross-functional teams—designers, data engineers, data scientists, and software engineers—collaborating to build and refine analytic applications. These applications will not only meet current business demands but also evolve to incorporate new capabilities, ensuring they remain relevant and impactful in a future shaped by AI and

other emerging technologies. This shift will redefine how organizations access, share, and act on insights, making analytic applications indispensable for success.

These applications are powerful tools for understanding and visualizing data, but having the tool is just the beginning. Knowing how to use it effectively and unlocking its full potential is what truly drives success. In the next chapter, we'll explore the art of transforming data into compelling stories that inspire action and drive results.

CHAPTER 6

Presentation and Communication

“The skill of data storytelling is removing the noise and focusing people’s attention on the key insights.”

-Brent Dykes

The Art of Data Storytelling

Storytelling is essential at every stage of data projects — not just in designing dashboards or analytic applications, but in presenting value, progress, and impact to leadership. It’s about crafting clear narratives that explain how to use the tools, drive change, and achieve results. Without the ability to tell the story within the data, even the best technical solutions lose their impact. This chapter explores

how to master data storytelling to inform, persuade, and drive strategic decisions effectively.

Using Data to Build Strong Partnerships

Clear and effective communication is essential for showcasing the value of data projects and building strong partnerships. To secure buy-in, your messaging must connect your work to tangible business outcomes like increased revenue, improved efficiency, or strategic growth. Strong partnerships begin with understanding your audience—knowing their priorities, concerns, and how they prefer to receive information. Tailor your communication to demonstrate how data initiatives directly support their goals.

Building trust requires more than sharing data; it's about telling a compelling story that ties insights to action. Executives, for example, want concise overviews of why your work matters and the results it will deliver. They don't need every detail—just enough to see the value and align with your vision.

As a data leader, your role is to ensure stakeholders see the full picture of what your projects deliver. By consistently

framing updates, strategies, and requests in terms of shared success, you can turn data into a bridge that strengthens partnerships, builds trust, and drives alignment across teams. Communicating value clearly and strategically is the foundation of collaboration and long-term impact.

Data Storytelling Basics

Start by defining the current situation and the desired future state of the business. Show stakeholders and leadership what the business will look like once your work is complete. By beginning with the end in mind, you help them visualize the outcome, making it easier to secure buy-in, investment, alignment, and support around the vision.

Include strategic recommendations—clear, actionable steps that address specific challenges and align with business priorities. Start with conservative proposals to build credibility, then introduce more ambitious ideas as you demonstrate success with early wins, such as delivering a project on time or improving a process.

To secure buy-in, conclude with a clear call to action, such as requesting budget approval, resources, or executive

sponsorship. Confirm leadership's understanding and support by summarizing key points and asking direct questions like, "Does this address our shared goals?" Ensure clarity on next steps and roles moving forward.

Finally, be transparent about risks. Focus on challenges like timelines, resources, or data security, and outline mitigation strategies. For instance, if collaboration is critical to meeting deadlines, propose regular check-ins to ensure alignment.

By combining a clear vision, actionable steps, and transparent risk management, you build trust, secure leadership's confidence, and position your work as vital to achieving the organization's goals.

Preparation Tips and Ideas

Leaders often overlook the importance of rehearsing and practicing their presentations. Running through your presentation out loud, anticipating potential questions, and preparing answers based on your slides are critical steps to ensure success. Put yourself in the audience's shoes, ask the tough questions, and have clear responses ready. The better prepared you are, the more trust you build

with executives. It demonstrates that you understand the goals, have thought through your work, and are ready to deliver results.

Early on, it's best to avoid live demos, as technical issues can disrupt your presentation and erode trust. However, once you've delivered measurable results or achieved key milestones, a well-prepared live demo can be a powerful way to showcase progress. If you choose to present a live demo, make it a primary focus of your meeting—not a quick agenda item. Ensure everything is thoroughly tested, and only show vetted code or products to avoid mishaps that could undermine confidence.

To further prepare, seek feedback from key stakeholders or internal allies before the presentation. Sharing your slides or demo with them is like having a proofreader for a draft—they can offer valuable insights, highlight areas to refine, and suggest what to cut. This step ensures your presentation flows smoothly and positions you for success during the actual meeting.

What to Do Afterwards

After your presentation, make sure to provide clear documentation, outline the next steps, and highlight any decisions made during the meeting. This helps everyone stay on the same page. This step is important because it's not just about what you're doing technically; it's about how effectively you're advancing progress and contributing to the business.

To keep things organized after the meeting, centralize your documentation in one easily accessible location. Instead of leaving everyone to sift through emails, consider setting up a shared space like an internal site, a Teams channel, Slack, or SharePoint. This makes it easier for your team to stay aligned and track engagement with the content.

But why stop there? Think of how much more effective this could be if integrated into your company's "analytic application". By embedding data, insights, design, and storytelling into a centralized ecosystem, you create a streamlined delivery platform that's part of the team's natural workflow. No more navigating across multiple tools to track updates—everything is in one place, easy to access, and designed to drive collaboration and insight

delivery. It's not just about staying organized—it's about building a seamless experience that keeps your business informed and connected.

Finally, remember that your presentation isn't just about showcasing your team's work or the project—it's about supporting leadership and aligning your efforts with their strategy. It's a balancing act: you're helping them execute their vision, and in return, you're asking for their support to achieve project success. When requesting resources or budget, bring creative solutions along with your ask and demonstrate how they address challenges or advance business goals. Be ready to collaborate and adapt as needed—this shows leadership that you're proactive and not simply expecting them to solve problems for you.

This is where the partnership comes in. Your presentation should reflect a mutual effort: you're supporting their strategy, and you're inviting them to support the team's work to ensure the project delivers the results everyone needs.

Creating a Great Presentation

Hopefully, you've felt inspired as you've read through all the information so far. At this point, you may be wondering how you put together a great PowerPoint presentation.

The truth is you don't.

That's a low-value activity, and there are experts (and AI) specifically for that. For an expert, you will need to hire an external partner if the company does not have an internal expert. They will help you understand the flow, what you need to accomplish, the necessary elements, where to source information, and how to advocate for it. Let the experts turn it into something polished and make you look amazing while you focus on using the data to tell the story you want to tell.

No matter the story you want to tell, the key is transforming complex information into a clear, compelling narrative. But a powerful data story isn't just about completing a task—it's about achieving real impact. You know you've succeeded when your story resonates enough to gain the support to drive lasting change.

Celebrating Wins to Unlock Additional Investment

Regularly assess the sentiment around these wins and any potential changes within the organization. This will help you identify if adjustments or reprioritizations are needed in your roadmap to stay aligned with the business's evolving needs.

If you must realign your priorities, emphasize the impacts of any suggested changes and what the changes mean to the roadmap. Make sure the business understands what's being sacrificed versus just agreeing to it.

By having metrics that allow you to track the utilization of a new system, you'll be able to celebrate your wins with supporting evidence from a data perspective. Host a series of meetings with people engaging with the delivery of your tools and do presentations to the business showcasing how they use what your team built and the impact that it's had.

When you can tell the story of how your work has transformed departments and teams, you're not just presenting data—you're showcasing the value you've created. Success comes from highlighting the real-world

impact: how operations have been revolutionized, how teams are now spending more time on value-added work, and how accurate, efficient data is driving actionable insights that leadership can rely on. A compelling story connects your work to the bigger picture, making the value unmistakable to your audience.

CHAPTER 7

Long-Term Success

“Leaders will not experience long-term success unless a lot of people want them to.”

-John C. Maxwell

Once You Deliver It...That Isn't the End

When you deliver a new solution, the real challenge isn't just executing the technical side; it's changing behaviors. You're introducing a new approach to an old process, and that can be tough. Understanding the impact on the business and coaching people to adopt new ways is always an important part of setting yourself up for long-term success.

Embracing Change Management for Lasting Impact

A good way to set you and your business up for long-term success is to start by celebrating the technical delivery, but don't end there. Schedule a change management process. Identify a group willing to use the new system and provide ongoing feedback. This volunteer group should be made up of stakeholders for whom delivery was built. These people will help you understand how the new solution is being utilized and if it's meeting their needs. Early adopters can be very useful in identifying potential issues and areas for improvement. Their insights will help you refine the system before a full rollout.

Many leaders find this part challenging because it takes them away from their preferred activities. But this is how you have to operate to make sure your delivery is well received and that other people view it as a success. Engage stakeholders early, securing their buy-in and holding them accountable. You've delivered this solution, and they need to use it. Once the solution is delivered, have regular check-ins to track its usage and gather feedback.

You can monitor metrics like the number of views on dashboards, hits on applications, and the reduction in manual reports. These metrics provide data-backed evidence of success and help celebrate wins. Use this data to host meetings where internal stakeholders demonstrate the tool's impact on their work. They do the actual demonstrations and the presentations to the business, showcasing how they use what you built and the effect that it has on them, their business, and their team. When these stakeholders speak highly of your solution, it builds credibility and highlights your success.

Imagine that this group is spending countless hours on a task, and it's frustrating. When their leader presents reports to management, they face a lot of pushback about the numbers and other details. The solution you provide addresses these clear pain points. Now, that same struggling group, which you identified as your test group, is singing a different tune. As a result, you're seen as the one who brought the solution that made their work more enjoyable and efficient.

Your Future Possibilities

Some of these things may seem out of reach. But I have witnessed promotions, increased headcount, and more responsibility for leaders who have adopted these practices. Some have even been recruited for better opportunities. They gain more responsibility, more money, and more respect and trust within the organization. I often say that the reward for good work is more work, which is part of the curse of competency. However, it also means you're given high-value challenges and opportunities within the business, which is more fulfilling for those who thrive on doing meaningful work. Seeing the business benefit from your impact is incredibly rewarding.

By delivering on your promises and executing effectively, you position yourself as the go-to resource for critical initiatives. I've worked with leaders who've become so valued that their peers turn to them for guidance, making them indispensable. They come back to me for advice, asking how to maintain their success and credibility. This perception within the organization is critical, especially for those aiming to stay ahead and secure more opportunities.

Unlocking Long-Term Success

The real opportunity presented in this book isn't just about improving processes or building better tools—it's about transforming how you lead and drive value within your organization. By acting on the insights shared, you position yourself as a forward-thinking leader who embraces innovation and delivers meaningful impact. Ignoring these opportunities isn't just a missed chance for growth; it's a step toward stagnation in a rapidly evolving world.

Success in today's environment depends on how well you adapt to change and leverage technology to meet the demands of the future. Leaders who embrace tools like analytic applications and integrate them into their operations aren't just keeping up—they're setting the pace. This isn't about avoiding obsolescence; it's about creating relevance and influence in a world driven by digital transformation and technologies like AI.

The way you deliver insights and solutions is a direct reflection of your credibility and competence. Fast, reliable, and well-designed solutions show your readiness to meet challenges and elevate your organization's performance. Thoughtful optimization of your data engineering,

modeling, and delivery ensures that you're not just reacting but leading with confidence and foresight.

Take full advantage of the strategies and tools available to you. Commit to refining your approach and building a foundation for long-term success—not just for your organization, but for your own growth as a leader. Your ability to adapt, innovate, and deliver will define your path forward and the legacy you leave behind.

CONCLUSION

Your team is on the way to a touchdown but that end goal is still far ahead of you. Now that you've made it through this book, you understand how important a good strategic roadmap is and how to get yours started. Sitting on this information and not taking action will only harm your career, your team, and the organization.

Your organization needs you to excel and be successful with your initiatives. Your team needs you to help them bring these initiatives to life. Without you making that next move, stakeholders will not gain the confidence you need them to have in your abilities.

As the quarterback, the ball was in your hands, allowing you to impact the game directly. Now that you're on the sidelines and orchestrating effective offensive and defensive strategies, you're coordinating all your responsibilities. With the plays you have at your disposal now, you can

make stronger decisions for personnel, time management, and staffing and influence decision-making at the highest level. You have the ability to continually innovate in a rapidly changing environment.

You can know your initiatives are leading your organization to the next level. Whether you're operating with a fully established budget and team or dealing with an inadequate team and budget constraints, you understand how to pivot to meet expectations. You're operating at an elite coaching level, utilizing innovative strategies that drive success for both your team and the franchise.

If you close this book now, failing to use any of the insights I've shared and ignoring the strategic plays inside, you risk everything. You risk losing credibility with your team and management. You risk your initiatives failing before you can get them started. You risk your ability to continually move forward in your career.

Hopefully, that's not you. By reading this book, you see now how valuable bringing in expert advice and innovative tools can be to your future success. It's what we do at Rower Consulting, and we love helping leaders exceed management's expectations as well as their own.

**Success Leads to Promotion and
Team Growth
Amid Organizational Layoffs**

Client: Worldly Foods

The Situation: During the fourth quarter, the team needs a field goal to win the game.

Problems Facing Worldly Foods:

Worldly foods faced challenges with manual financial reporting and needed a more efficient, automated solution. The time-consuming manual processes resulted in high error rates, inefficiencies, delays, and inaccuracies. The delays and inaccuracies led to frustration being felt at all levels of the company.

They reached out to Rower Consulting for help creating an automated solution to streamline financial reporting and reduce their errors.

How Rower Consulting Transformed Their Company:

Rower Consulting automated their financial reporting processes. This solution reduced their

reporting time, minimized errors, and provided more accurate and timely financial insights.

What Is Life At Worldly Like Now?

Worldly has an automated, efficient financial reporting system that minimizes errors and significantly takes less time for reporting. The Senior Director has been promoted twice and his team has grown from a single Rower Consultant, to a team of 25 consultants and full-time employees. His team now focuses on more strategic initiatives while continuing to provide leadership with timely, accurate insights.

Rower Consulting is here to be the expert and thought leader you need in the field of data science, analytics, and digital transformation. With an eye toward excellence, we focus on your business, tailoring innovative top-tier services to meet your specific needs and challenges. If you would like to speak to us about unlocking new opportunities leading to success and promotions, please visit www.rowerconsulting.com.

If you have any questions about anything in this book, feel free to email me at nsabree@rowerconsulting.com. I wish you success and happiness in your work and life.

~Nasheed Sabree, Founder and CEO of Rower Consulting

ROWER CONSULTING SUCCESS STORIES

Rower Consulting consistently transforms crises into success stories. Here are some of the most impactful examples of how we deliver results with speed and precision.

How Data-Driven Insights Amplified Stakeholder Confidence

A major charitable foundation turned to Rower Consulting to help it solve a vital problem: How to quantify the impact of its programs and effectively convey the value of its philanthropic work.

While the foundation had a solid grasp of its financial investments, it struggled to measure and articulate the tangible impact of its programs. This lack of clarity around their social return on investment (SROI) led to stakeholder uncertainty about the effectiveness of their initiatives. Traditional ROI metrics and qualitative reports failed to

capture the true value of their social impact, creating gaps in transparency and accountability.

Rower Consulting stepped in with a data-driven solution. By enriching their data with external datasets — such as those from the Bureau of Labor Statistics — and developing tailored SROI metrics, the team provided the foundation with a robust framework for measuring program outcomes. The foundation gained a clear, quantifiable understanding of the outcomes of its programs. Now, they can effectively communicate the value of its investments, enhancing trust and support from stakeholders and driving more impactful initiatives.

How Rower Consulting Turned Error-Ridden Chaos into a Streamlined Reporting System

A prominent pediatric healthcare provider partnered with Rower Consulting, seeking ways to improve the significant inefficiencies and errors caused by outdated manual data processing. They faced challenges in their existing workflows, such as time-consuming manual updates, version control issues, and a high incidence of human error. These traditional methods not only resulted in inconsistent and inaccurate reporting but also slowed

down operations, leaving teams frustrated and struggling to keep up.

The Rower Team automated workflows using VBA in Excel and transitioned static reports into dynamic, interactive Tableau dashboards to deliver a modernized solution. These changes streamlined reporting operations, minimized errors, and provided actionable insights in real time. The healthcare provider now has a robust, automated reporting system that minimizes errors and enhances their ability to make data-driven decisions.

How a Global, Multi-Channel Food Service Drove Profitability Through Elasticity-Based Pricing Solutions

A prominent food service company managing multiple brands partnered with Rower Consulting to optimize its pricing strategy. Their traditional approach relied on broad, percentage-based price increases and manual analysis, which failed to consider key factors like price elasticity and market-specific factors. Without a method that considered nuanced pricing strategies, they were unable to optimize their prices properly.

The Rower Team developed a more sophisticated, data-driven approach to pricing. This dynamic pricing tool seamlessly integrated price elasticity analysis with market-specific insights and enabled the company to make informed, strategic pricing decisions across all its brands.

As a result, the company has adopted a revolutionary pricing strategy that optimizes its pricing decisions and enhances profitability while strengthening its market position.

Boosting Stakeholder Value by Delivering Actionable Insights Faster

A management services company struggled with inefficient, traditional reporting processes and lacked a cohesive, friendly data portal. Their reliance on manual methods led to data silos, delays in reporting, and inaccuracies that made it challenging to deliver actionable insights to stakeholders. Without a centralized data portal, their operations lacked the cohesion needed for effective decision-making.

To solve these issues, the Rower Team developed a comprehensive web-based data portal powered by SQL Server, Angular, and Python. This solution provided them

with a unified, automated reporting workflow with a user-friendly interface that simplified stakeholder access to critical information.

The company now operates with a seamless, efficient data portal that provides accurate insights quickly and efficiently. This transformation has enhanced their decision-making capabilities and strengthened their ability to deliver value across the board.

How Automated Reporting Revolutionized Patient Care

Amid the challenges of the COVID-15 pandemic, an integrated managed care consortium struggled with outdated reporting systems and inefficient manual processes. Their existing workflows were slow and error-prone, making it nearly impossible to access the real-time, accurate data needed for critical decisions about patient care and resource allocation. Their existing traditional data reporting methods were insufficient to meet the urgent and evolving demands of the crisis, leading to delays and inaccuracies that compromised operational efficiency.

The company partnered with Rower Consulting to build a comprehensive solution to enhance their data-driven decision-making. The Rower Team overhauled their Tableau reports, implementing automated reporting processes and offering strategic insights for optimization. This solution significantly improved the speed, accuracy, and reliability of their data reporting.

Today, the company is equipped with a robust, automated reporting system providing timely and precise data to support informed decision-making. This transformation has enhanced their ability to manage patient care while optimizing resource management during critical periods.

How Rower Consulting Rescued a Pharma Giant with a Scalable, Data-Driven Web Application Transformation

A pharmaceutical company inherited a poorly designed web application from a previous consulting firm and quickly encountered serious challenges. The issues with scalability, weak architecture, and limited analytics capabilities created inefficiencies and user frustrations. They initially partnered with a Big Four consulting

firm. However, that firm's solution proved costly and ineffective — failing to meet their needs.

They looked to Rower Consulting for a competent team to fix the existing mess and provide a scalable, intelligent solution. The Rower Team addressed the issues head-on by migrating their web application to Curator by Interworks. This solution provided them with an advanced platform featuring enhanced analytics and scalable infrastructure and transformed their web application.

The pharmaceutical company now enjoys a modern web application that supports data-driven decision-making while offering scalability for future growth opportunities. They now have a modern, scalable web application that provides valuable analytics, supports better decision-making, and offers a clear runway for additional value creation. Rower Consulting's expertise not only resolved their immediate challenges but also laid the foundation for long-term success.

How Rower Consulting Modernized Training and Data Governance for a Growing Fast-Food Enterprise

A leading fast-food chain faced challenges with outdated, manual processes for restaurant training, development, and data governance. Their traditional methods led to inefficiencies, inconsistent training outcomes, and significant challenges in scaling their programs to meet the demands of a growing business. To address these issues, Rower Consulting developed a modern, automated solution capable of streamlining training operations and improving data governance.

The Rower Team overhauled the chain's systems by leveraging the Qualtrics API to automate training data processes while redesigning workflows to increase efficiency. They migrated critical information to modern platforms, ensuring better governance and accessibility. This comprehensive transformation gave the company a more efficient and scalable training system.

Today, the fast-food chain has a cutting-edge, automated training infrastructure that enhances efficiency, consistency, and scalability. This automated training system elevates

their training outcomes—enabling them to meet growing demands with confidence.

Rower Consulting delivers results where others falter. Our ability to step in during moments of crisis, assess the situation, and execute with unmatched speed is what makes us the trusted partner for leaders under pressure. Whether it's automating a failing system, optimizing outdated processes, or building innovative tools, our work enables leaders to succeed when it matters most.

When the stakes are high and time is short, we don't just save projects—we save careers.

ABOUT THE AUTHOR



Nasheed Sabree is an accomplished data strategist, entrepreneur, and thought leader in analytics and digital transformation. As the Founder and CEO of Rower Consulting, he has partnered with Fortune 500 leaders to deliver innovative data solutions, drive organizational efficiency, and transform ambitious visions into reality.

Throughout his career, Nasheed has successfully led high-impact teams and projects at Children's Healthcare

of Atlanta, PulteGroup, GoTo Foods, ADP, and Mars, where he built intelligent systems, automated complex processes, and created best-in-class solutions that elevated organizational performance. His leadership and ability to navigate complex data challenges have established him as a trusted partner for executives striving to achieve results under pressure. Nasheed's innovative contributions have earned him recognition as a "secret weapon" for leaders facing high-stakes expectations.

While Nasheed has been recruited for executive leadership roles at companies such as Meta, Lego, Expedia, McKesson, Atlassian, and others, he is driven by his mission to build the best technology consulting firm. His focus is on empowering organizations to leverage best practices in data management, design, software development, and AI to create cutting-edge applications that drive innovation and keep them ahead in a rapidly evolving technological landscape.

Based in Atlanta, GA, Nasheed is a sought-after speaker, workshop facilitator, and mentor. He has taught bootcamps and presented at prestigious institutions, including Emory University, sharing his insights on navigating the complexities of modern data ecosystems.

When he's not leading projects or inspiring the next generation of data leaders, Nasheed enjoys spending time with his family and reflecting on his faith, which serves as the foundation for his purpose-driven approach to life and work.

