
Practice papers

The care and feeding of digital analysts

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Abstract Achieving excellence in digital analytics requires a dedicated balance of people, process and technology. This paper focuses on the people side of this equation, providing tips, opinions and observations, rather than rigorous research or structured analysis. The paper offers advice for analytics team leaders and those who would like to become one, recognising that analytics is a unique occupation in that it offers guidance rather than an end product. The paper discusses special management considerations, including the ongoing need to explain and convince the rest of the organisation of the value of analytics; hiring the smartest people and getting out of their way; supervising a diverse mix of personality types that are not necessarily well suited to team efforts; keeping the best and brightest engaged; recognising leaders and developing their skills; helping people get the recognition they deserve; maintaining core, organisational values; and staying human in an industrialised environment.

KEYWORDS: analytics, management, advice, unique, value, recruit, retention

INTRODUCTION

Achieving excellence in digital analytics requires a dedicated balance of people, process and technology.

Understandably, there are many articles dedicated to tackling rapidly changing technology — as the pace of change increases, the landscape becomes increasingly challenging.

Marketing analytics processes, meanwhile, are unique to every organisation. Yes, there are best practices to consider, but these provide only a starting point — a process hypothesis that may or may not work in a given environment.

The present paper focuses on the people side of the equation, recognising that people are distinctive and require special care.

To this end, it offers tips, opinions and observations, rather than rigorous research or structured analysis.

There are enough general principles of standard, personnel management to fill an entire library of business books. This paper discusses those principles most important to digital analysts, and examines how analytics is a unique undertaking — and analysts a unique breed (see Figure 1). Tips are provided for analytics team leaders and those who would like to become one.

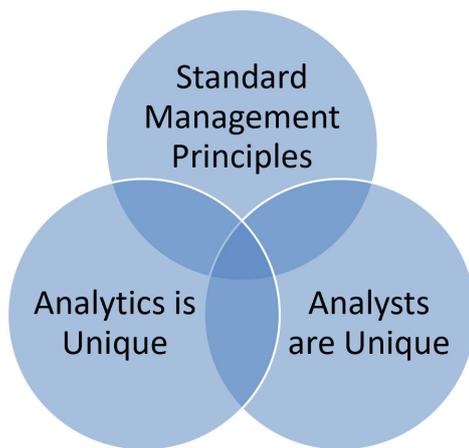


Figure 1: Standard management principles must be tempered with technical knowledge of the uniqueness of analytics and emotional intelligence about analysts themselves

Analytics is an unusual task in an organisation. The product team produces products. Marketing gets the word out. Administration makes sure the wheels turn smoothly. Customer service answers customer questions and solves their problems. The analytics team, however, is only there in an advisory capacity.

Whether they are reporting on outcomes generated by others' efforts, conducting tests in pursuit of marketing optimisation, or exploring fascinating data sets in search of elusive insights, the output of an analytics team is recommendations and advice. It is then incumbent on the recipients of that advice to deliberate on its value, take action and then get the credit for their deeds.

This leaves analysts in the unenviable position of having no clear key performance indicator tied directly to revenue, savings or company success. This can cause analysts to feel undervalued, especially when their data-backed advice is ignored or discounted.

Individuals who are drawn to analytics as a profession find themselves in the same situation as IT and software people. They are dedicated to the complexity of their craft and the specialised knowledge required, but

they are not necessarily the most personable, gregarious or charming folks in the room.

The job, the lack of understanding by others of the job, and the type of people who are frequently attracted to the job, come together in a way that requires special handling.

SELL THE VALUE OF ANALYTICS

The best managers know that they work *for* the people who report to them, rather than the reverse. It is the team members who get the work done; it is the manager's role to make sure they have the skills and tools to do the job and keep the rest of the organisation — especially upper management — from gumming up the works.

It is the manager's job to protect their team from the organisation. The manager is there to run interference, identify and prioritise which projects are most likely to succeed, and help the organisation understand the value created by the data logicians.

The following comment from Valerie Kroll, Optimisation Director at Search Discovery and Chair of the Digital Analytics Association Board of Directors, illustrates just this:

'I didn't anticipate was how hard, but important, it was to protect my team from the craziness above me! I had such an excellent manager that I didn't realise how much he protected me, but now I was participating in budget planning and the horse trade of open FTE role allocation, and it was so politically charged! At first, I was sharing these new experiences with my direct reports, but quickly realised that was unnecessary stress for them. Instead of dragging my team along on my daily rollercoasters, I gave them the same protection my manager had given me so they could focus on their great work. This was hard because I'm a pretty open book, but there was a notable difference in the vibe of our team meetings and that felt really good.'¹

Great team leaders and their directors act as analytics cheerleaders and shoulder the

responsibility of educating people who consume the advice derived from the data. They get these clients to understand that dashboards, reports, test results and insights are not a report card, not a judgment and not a criticism of their work, but rather an aid to their success. In the words of Rusty Rahmer, Head of Customer Experience Solutions at GSK and member of the Executive Board of Directors at the Digital Analytics Association:

‘As a high-performing individual contributor on teams, I took for granted that someone was consistently selling the value, impact and vision of the team. When I took my first leadership assignment, I quickly learned that those who put a concise story together about the services, value and impact their team were getting the resources, money and support for the things they need to unlock even greater value/impact. So, learning the art behind selling your team and the work they do was a big, unexpected, but critically important learning for me.’²

This is all done with the comprehension that non-data people may suffer from some degree of arithmophobia or can become confrontational when asked to face the music in the form of charts, graphs and dashboards. Responses could be all over the map, and may include:

- fear of data — ‘I’m bad at maths’;
- distrust of data — ‘I don’t believe you’;
- lack of data governance — ‘my data are better’;
- lack of data vernacular — ‘that’s not what we call it’;
- lack of data literacy — ‘cross tabs? pivot tables?’;
- lack of data decisioning process — ‘intuition got me this far’.

Adoration of data does not come naturally and wears off much faster than expected. It is a manager’s ongoing duty to raise the

visibility of positive use cases and the efficacy of analytics collaborators.

Experienced team leaders also help their staff understand the best ways to work with decision makers. Rather than merely responding to a metrics question by delivering ‘the numbers’, talented analysts ask about the purpose behind the request. This sets them up to better understand the goals of the organisation, the department asking for the data, and even the individual asking for the figures.

A *great* team leader ensures their staff avoid the ‘five whys’³ trap, but instead approach their clients with more nuanced queries:

- What is important to you about this?
- What would be a good result?
- What do you think the range of answers should be?
- What would you investigate if the results were out of that range?
- What challenges are you facing?

DO NOT BE THE SMARTEST PERSON IN THE ROOM

‘If you’re the smartest person in the room, you’re in the wrong room.’

Whether one attributes these words to Jack Welch, Lorne Michaels or Confucius, there is little doubt that they are words to live by.

Managers need to worry about paperclips, timecards, staff meetings and the rest of the administrivia that comes with the job. Their job is to focus on blending brilliant developers with gifted data pipeline builders, extraordinary analysts, wizards of visualisation and the whole village that it takes to raise a data culture.

For managers, the best tactic is to recruit the smartest people around and then get out of their way. You may once have been the go-to-person for a specific tool or datastream, but those days are gone. Now is the time for the next bright, young aspirant to pick up the torch and stay on top of the

newest, coolest tech. Managers need to be spending time learning about dynamic team coaching, intra-organisational politics and increasing their collaboration skills.

DO NOT MICROMANAGE

Every guest on the Marketing Analytics Live Online show (<https://marketinganalyticslive.com>) was asked if they had any advice for their former bosses and they all said the same thing: tell people *what* you want them to do and *not how*.

Guaranteed, they will not do it the way you have seen it done, have done it yourself and would do it again. They will find their own way and — perhaps after a false start or two — will find a way that is better, cheaper and faster *for them*.

Most people are resourceful enough to ask for help when needed, so let them surprise you and you are likely to learn something new.

Rather than teach them how to do a chore, teach them how to think, how to be resourceful and even how to delegate. Give them problems to solve rather than tasks to do. Get them to do their own research.⁴

JUGGLE PERSONALITIES

A team must work, well ... as a team. But if everybody knows the same things, solves problems the same way and thinks alike, they cannot be as productive, efficient or creative as they need to be.

Any team will include introverts, extroverts, lone wolves, teachers, leaders and others — there has to be diversity.

A mix of differing histories with alternative perspectives will enrich the conversation. Racial, economic and gender differences are a start. But consider striving for neurodiversity as well. To quote the old Apple adverts, it is important to have people who ‘think different’.

If some team members are deeply inept at socialisation, you (and they) may prefer

to continue to work from home post-COVID-19. Others may jump at the chance to take soft skills training courses.

DESIGN INDIVIDUAL CAREER PATHS

As you build, manage and grow to depend on these individuals, keep in mind that everybody leaves. At some point, they will accept a position elsewhere, their spouse will get a promotion, their elderly parent will need a caregiver, they will experience a midlife crisis, or hit the lottery ... and they will leave.

For this reason, it is important to have a programme of continuous recruitment. When the right person shows up on the radar, be ready to bring them on board whether or not there is a formal position open. Good people are hard to find, so if you trip over one, do not hesitate to recruit them.

Be sure to recruit for values and curiosity rather than technical skills. Anyone can learn a new tool, but it is impossible to teach enthusiasm, mutual respect or work ethics. (For clues on the hiring process, check out ‘Who: The A Method for Hiring’.⁵)

When interviewing and bringing new people into the fold, it is important to understand their version of, ‘Where do you see yourself in the next five years?’ It is the manager’s task to help them see a clear path to their goals through their organisation. This is mutually beneficial as their matriculating to other jobs in other companies will pay dividends down the line: first, by singing your praises, which will attract others, and secondly — for managers who are really good — they will come back after learning a great deal from others.

Continuous learning opportunities are essential. Analysts are hungry learners and whether their interest is in management, technology or something more unusual, they must be able to feed that appetite. If they can play with the toys they like and see a clear path to their professional goals, they will reward you with excellent work.

Do not assume that the answers they gave years ago during their interview are sacrosanct. Times change, interests change, people change. Revisit their goals with them quarterly.

ROTATE RESPONSIBILITIES

Just as data can be locked in silos, so can skill sets. Avoid this killer of career keenness by periodically rotating analysts into different roles. Move people around so they live in a world of continuous learning. Perhaps the e-mail analyst should take over social media analytics, the search analyst should work on testing, and the data visualisation person should work on personalisation.

Not only will they learn new things and avoid stagnation, this cross-training provides more coverage in the event that people are stretched too thin or momentarily unavailable. It also creates a more cohesive team with more empathy for teammates who are better informed about how all the pieces fit together.

Outside consultants should be rotated in and out as well. Where a consultant is being employed for specific task for an indeterminate amount of time, that job should be assigned to a full-time employee. Consultants that are only there to advise and strategise, so should not be kept around for more than two years. They have given their best and a new pair of eyes should be brought into offer a fresh perspective.

Employees need resources for continuous learning and time to research. Do not think they are loafing if they are spending a lot of time on Stack Overflow (<https://stackoverflow.com>) or #MeasureSlack (<https://www.measure.chat>). Recognise them for being resourceful.

Give them funding to attend classes and go to conferences. Encourage them to present their work in public. Acclimatise them by getting them to present to each other — and give constructive feedback.

Above all, because analytics is a unique profession, team members need time for ‘Deep Work’,⁶ that is, concentrated time without distraction. People’s lives are filled with e-mail, social media, phone calls and Zoom meetings that can easily take over an entire day. I have taken this one to heart after my wife asked me what I did that day and my answer was simply, ‘e-mail’.

Deep Work provides a chance to do some deep thinking rather than being responsive to everything. It allows an analyst to go down a rabbit hole or two and play what-if games with the data. This is the true analysis rather than the data collection, cleaning, loading, reporting and administration of the day. It is creative time.

Taking the time to really *do* Deep Work is a learned skill that must be nurtured.

PROMOTE LEADERS

Some people are good at their tasks and some are good at getting everybody on board to get a project done. Encourage the former and promote the latter.

Promote the leaders; reward the achievers; get rid of the cheaters.

On any team, it is clear who the leaders are: the ones people turn to for direction because they are thoughtful — not because they are the loudest or talk the most. They are respected and liked. They are followed.

Like everyone else, managers will eventually be promoted or leave. To prepare for this, it is important to have a succession strategy well in place, with people ready to put their hands on the steering wheel. Managers must therefore groom the leaders in their teams to take over once they leave. An obvious tactic in this respect is to get team members to assume managerial duties on a temporary basis while the manager is otherwise unavailable, quite possibly fending off senior management.

Achievers may not be leaders. They may excel at coding, have tons of business acumen, or be prodigious presenters, but

they are just not management material — and that is fine. Leave them where they can be most valuable and create a growth path for them that provides the status and financial rewards they need without saddling them with direct reports. Many firms employ distinguished engineers and technical fellows who are the cream of the crop — but they are not managers of other people.

Cheaters are those who are not pulling their weight. The promise of hard work and ingenuity just does not come to fruition with these people. They may have great resumé's, lots of references and a winning interview style, but when it comes to getting the work done, they do not deliver, causing nothing but stress for their colleagues. As things stand, these people are cheating themselves out of success — yet they might excel in another organisation. Letting these people go at the earliest convenience does everyone a favour.

PRAISE IN PUBLIC, CRITICISE IN PRIVATE

This is time-honoured advice for any manager, but when it comes to analytics, it is even more important.

At the start of every Analytics Cohorts (<http://analyticscohorts.com>) meeting, we share good news — something that has happened since the last meeting that brought joy, be it personal or professional. One member of a cohort announced that he had intended to talk about his son taking his first steps — a truly momentous occasion — however, he had *just* received something that he had to share ...

... In the company newsletter, the chief marketing officer had called out the analytics team for producing 'pivotal insights' that heralded a new product direction. This was surprisingly high praise from somebody he and his team had never even met.

This kind of recognition is worth much more than bonuses, parties and days off.

Being recognised for good work is one thing. Being recognised for having a material impact on the company is amazing. And it cost nothing.

As a team leader, analytics director or chief analytics officer, it is vital to make sure that those who rely on data teams are aware of their value and are willing to signal their awareness loudly and often. These people need reminders of the value of data and the value of public praise.

Conversely, when something goes wrong, it is management that needs to take the blame. When teams understand that their wins are theirs but their failures are management's responsibility, they will strive to win and be willing to take risks to make it happen.

CULTURE EATS STRATEGY FOR BREAKFAST

This truism, attributed to Peter Drucker, is a widely recognised problem — but what can managers do about it? Buy another foosball table? Give everybody popsicles on Fridays over the summer? More music in the lunchroom?

In his book 'Scale at Speed',⁷ Felix Velarde writes, 'What is tolerated becomes an acceptable way of doing things; what is acceptable becomes actually the way you do things'. In short, culture is what is allowed to happen.

If people are constantly late for meetings, well that's just how we do things around here. If people generally miss deadlines, it is simply part of a culture where deadlines don't mean much. If rude, sexist remarks or 'locker room talk' are normal, then the workplace is toxic — this is its culture.

As Seth Godin puts it:⁸

'There is no more powerful tribal marketing connection than this.

More than features, more than benefits, we are driven to become a member in good standing of the tribe. We want to be respected by those we aspire to connect

with, we want to know what we ought to do to be part of that circle.

Not the norms of mass, but the norms of our chosen tribe.’

Anyone can hang corporate values on the wall for all to see. Accountability, collaboration, curiosity, customer centricity, diversity, honesty, integrity, transparency and trust — these are company values — displayed on the company website for PR purposes. Corporate values are shown in action.

Managers must be quick to discipline those who step out of line — and do it publicly. It is important to be transparent about one’s expectations and what happens when people transgress. Staying quiet about disciplinary matters is not an option: in the absence of information, the rumour mill will soon start up to fill the void. When people start making up things, it flatters no one. It is therefore vital to control the narrative and not let the grapevine run away with the story.

WORK ON YOUR OBITUARY

In April 2020, when lockdown had just started and people were seriously flipped out, Melinda Byerley interviewed Tom Peters on her podcast *Stayin’ Alive in Technology*.⁹ She asked what people should do during the pandemic rather than just worry themselves sick.

Peters talked about the difference between resumé virtues and eulogy virtues. Nobody gets up at a funeral and mentions how much money you made, how quickly

you got a promotion or whether you founded a corporation. They talk about how you treated other people.

Nobody is eulogised for being on-time and on-budget. What people remember about the dearly departed is how hard they worked to do their best to overcome their obstacles and how much they helped other people.

In trying times, it is more important than ever to focus on being humane to the people around us. That’s just good advice all around. Managers who keep this in mind when dealing with their team will be rewarded with excellent work, loyalty and insight from the heart.

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