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Raise the credibility, productivity and impact of your data analysts

Interactive Development Workshops for Data Analysts

Are you getting the best out of your analytics teams?

Your Insight, Business Intelligence, Risk and Data Science teams are key to unlocking the potential of your vast data pools and driving data-led decisions, but many organisations are recognising that technical skills alone are simply not enough.

Without a complementary set of soft skills, analysts can become ineffective and irrelevant, and as the organisation struggles to harness their outputs, both stakeholders and analysts can become disillusioned and disengaged – a lose/lose situation for the organisation and the analyst.

> *'I've used Steve repeatedly over a number of years to upskill my analytical teams. He has a rare combination of having had hands on experience of insights & analytics as well as the ability to deliver engaging workshops that deliver analytical service best practice.*
> *His workshops have always been well received, with both attendees and their managers having subsequently witnessed improvements in their profile, stakeholder engagement and productivity.*
> *I would recommend Sophic's workshops to any business who needed to develop their analytical capability and impact.'*
>
> **Martin Squires**
> Analytical Leader and Data IQ 100
> Most Influential People in Data

How can Sophic help your team to increase their impact within your organisation?
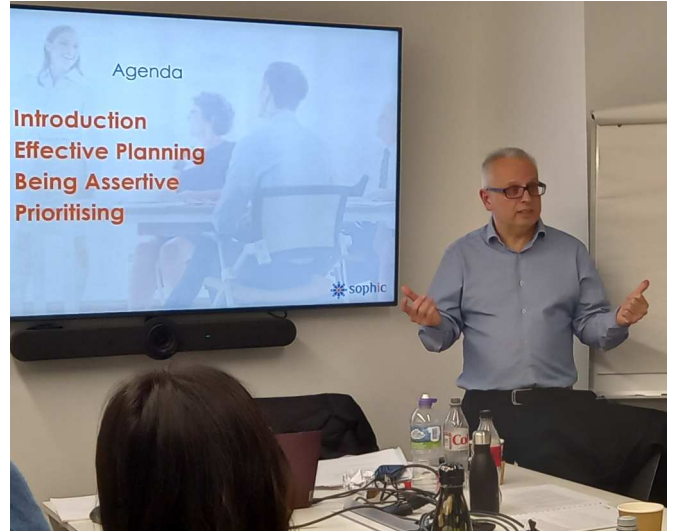
Sophic deliver training workshops that provide your teams with the awareness and know-how to ensure they have a positive impact on those decision makers that they are ultimately employed to serve and influence.

Our specifically designed portfolio of interactive modules focus on providing strategies for overcoming some of the key barriers, challenges and issues that can hold teams back from adding real value to the organisation – transforming them into pro-active consultants rather than passive 'number crunchers'.

Our practical tips help the analysts build credibility and trust with stakeholders and improve their productivity and impact through better stakeholder engagement – raising not only their profile and influence within the business but also elevating their own sense of value, respect and job satisfaction. **Win/Win!**

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Who are we?

Sophic was founded by Steve Hulmes, who has led the development of our workshop portfolio and is our principal facilitator. With over 30 years experience in the analytics industry Steve has worked with some of the UK's largest organisations and trained and coached over 1,600 analysts through his workshops. Steve is passionate about analytics and people development and he uses his experiences to bring workshop content alive and make it relevant and on-point for participants.

How do we deliver?

We deliver our workshops both online and face-to-face. Places are limited to just 8 online or 10 face-to-face participants to maintain high facilitator-to-participant contact. Our workshops include theory, examples, exercises and discussion to maximise the learning experience.

Steve Hulmes - Founder

"I first attended one of Steve's workshops in the mid 2000's and the some of the learnings have stayed with me and shaped me as an analyst over the years, helping me to reach my potential as both an analyst and analytical manager.

His workshops are engaging and fun, and Steve's own background in Analytics means he has appreciation of the challenges faced by both analysts and managers, something he uses to bring the content alive through his experiences and anecdotes.

Steve's deep understanding of the differences soft skills can make to individuals and businesses are core to the workshops and I believe this is what can help deliver real value to organisations. I've used Sophic to upskill my own teams and will continue to recommended them to other teams looking for practical ways to improve their impact and reputation within the organisation."

Vic Hardcastle
Data Strategy & Innovation Manager

Why use Sophic?

• **Our unique workshops have been designed specifically for analysts by experienced industry experts.**

• **Workshops are facilitated by Steve Hulmes, an experienced analyst coach.**

• **We have worked with a broad range of clients including Aviva, NHS, Boots, Sainsburys Bank and Boohoo.**

• **Our workshops are interactive, practical and fun.**

• **We can design a programme of workshops to address your own team's specific development needs.**

• **Over 98% of participants would recommend our workshops to other analysts.**

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Our Stakeholder Engagement Workshops

Workshop	Overview	Time	Max People
Working Consultatively*	The mindset and communication practices that can help analysts improve and build trust and credibility with their stakeholders	4 hours	8 online 10 face-to-face
Managing Workloads and Stakeholder Expectations	The key steps and approaches that will help analysts avoid over-committing and under-delivering which represents one of the key sources of stakeholder frustration and also a major cause of analysts stress	4 hours	8 online 10 face-to-face
Impactful Reporting*	A framework for developing needs-based report designs that are intuitive and coherent including adding effective interpretations to outputs	4 hours	8 online 10 face-to-face
Data Visualisation*	The key steps to developing simple, effective charts including theory, examples and exercises to apply the theory	4 hours	8 online 10 face-to-face

*Excel or equivalent required for online version.
More detail on each workshop is provided on the following pages

Who are the workshops for?

The workshops are relevant for any one responsible for converting data into reports, analyses or models. Previous participants have included Business Intelligence analysts, Customer Insight analysts, Credit Risk Analysts, Data Scientists, Finance Analysts, MI Analysts, Pricing analysts, Retail analysts and Fraud Analysts.

Participant Requirements

For our open workshops, held online, participants will need to join via Zoom and have their cameras and audio switched on to take part. Also, they will need to be able to access and use Excel (or equivalent spreadsheet app) for some workshops (denoted with *). Private workshops can be delivered face-to-face, on-site or online depending on your requirements.

Fees

Places on our scheduled open workshops are £245+vat for each participant. The latest schedule of public online workshops can be found on our website www.sophic.co.uk. However, significant savings can be made if you wish to host a private workshop exclusively for your own teams – please call or email for a quote.

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'Making Analysis Work for Business' programme detail

Working Consultatively

What's the workshop about?

Many of the common frustrations and challenges that analysts' experience in their roles are rooted in their engagement with stakeholders (or lack of it!). This can be compounded by analysts unconsciously working to a passive service model that limits their ability to work to their full potential.

In this interactive workshop, participants will discover how they can move naturally to a more 'consultative' approach that will improve stakeholder relationships and deliver better outcomes for both the analysts and stakeholder.

Through a combination of theory, examples, exercises and discussion participants will gain an appreciation of the mindset and communication practices they can implement immediately - changes that will help elevate their productivity, impact and value to the organisation.

What will participants learn?

The workshop's two main themes are mindset and communication. Some of the key learnings include:-

• Why working Consultatively rather than Passively is a win/win for both analyst and stakeholder.
• How analytical teams are REALLY measured and why feedback is so important.
• The two service elements that are critical to your stakeholders.
• Why your briefing process may be holding you back.
• The one question you can ask that will help avoid passive behaviour.
• The key practices that will improve your communications with stakeholders.
• How to build and maintain trust and credibility with stakeholders.

Managing Workloads & Expectations

What's the workshop about?

Over-promising and under-delivering is a source of frustration for both the stakeholder and the analyst. Any trust and credibility that the analyst may have developed with their stakeholders can quickly erode if deadlines are missed or the quality of work is compromised in an attempt to meet a tight schedule.

The key to avoiding over committing is a combination of effective planning and effective expectation communication with stakeholders.

In this workshop, participants explore the reasons why over-committing is commonplace, and through theory, exercise, and examples are introduced to practices, techniques, and tools to help analysts effectively plan and manage their workloads and also stakeholder expectations.

What will participants learn?

Some of the key learnings include:-

• Why we might, either knowingly or unknowingly over-commit ourselves.
• Four key practices that are often overlooked that can help avoid over-committing.
• Why being assertive is key to managing expectations and deadlines.
• The impact and difference between assertive, aggressive and passive behaviours.
• Different assertive approaches to use when confronted with the three common pressure scenarios many analysts experience.
• How to make or refuse a request.
• Using transparent planning as a communication and prioritisation tool.

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The workshops continued..

Impactful Reporting

What's the workshop about?

When you've had your head buried in the details of the data it can be difficult to see the wood for the trees and design reports that are robust, coherent and intuitive to read. It's common to take a bottom-up, data-led approach to report design but this rarely hits the mark for stakeholders who may struggle to make the connections you take for granted.

In this workshop, through a combination of theory, examples and exercises, you'll be introduced to a hierarchical needs-based approach to developing reports along with a framework for adding effective commentary and interpretation. It's an approach that forces a shift in perspective that will improve the quality and impact of your final reports and ultimately better serve the stakeholders who receive them.

What will participants learn?

Some of the key learnings from this session are:-

• Why a bottom-up approach to report design is commonplace but rarely delivers the best outputs.
• What elements should be present on any report.
• Using a hierarchical needs-based approach to drive intuitive, coherent report design.
• How to apply a top-down approach to filter unnecessary detail from reports.
• Adding value to reports.
• How to effectively add both Objective and Subjective interpretation to reports.

Data Visualisation

What's the workshop about?

The most effective visualisations are simple and insightful and take less than 5 seconds to comprehend. However, with the vast array of visualisations presented through modern reporting software it can be easy to succumb to delivering style over substance and over-complicating the final outputs.

Ineffective charts are usually the result of poor design and a lack of a conscious application of a process to filter unnecessary detail and consider the ultimate needs of the end user.

In this workshop, Steve will share visualisation theory, research and practical tips to provide a template for developing effective charts that stakeholders will consume without effort. Participants will undertake exercises to apply the learnings.

What will participants learn?

Through theory, examples and exercises the key learnings from this session are:-

• How modern software can compromise effective chart selection and design.
• The difference between explanatory and exploratory charts.
• What makes a good chart? – established chart design theory.
• The research that backs up the theory.
• How using a top-down rather than bottom-up design approach delivers more effective charts.

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