

Managing change in data analysis reporting

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ABSTRACT

Wellington Supplies Inc., a 200-year-old manufacturing leader, has grown exponentially, increasing annual revenue from \$300 million to \$1.2 billion over the past decade. However, this growth has placed significant strain on the company's data analytics team, which dedicates substantial time to producing monthly reports across 50 global sites with varying data capabilities. Alex Carter, head of the Data Analytics Department, proposes shifting to quarterly reporting to optimize resources, improve accuracy, and support strategic insights. Despite the potential benefits, senior leadership resists, citing concerns over real-time data and accountability. This case explores the challenges of balancing operational efficiency with leadership priorities.

Keywords: data analytics, organizational growth, operational efficiency, leadership, influence

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Teaching Notes: For teaching notes, please contact Dr. Joshua Ray at Joshua.Ray@LMU.net.

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INTRODUCTION

Founded nearly 200 years ago, Wellington Supplies Inc. has a storied history marked by numerous transformations. Starting as a small, privately owned manufacturer, it evolved through different ownerships, including government oversight and public trading. Now, as a privately held enterprise once again, Wellington has firmly established itself as a leader in the manufacturing of specialized B2B supplies, catering to industries that rely on precise, dependable products.

Over the past decade, Wellington has experienced unprecedented growth, expanding its annual revenue from a modest \$300 million to over \$1.2 billion. With 50 production and sales facilities spread across 15 countries, the company is grappling with the operational and analytical demands that come with scaling at such a rapid pace.

PROBLEM STATEMENT: THE DATA REPORTING PROBLEM

Alex Carter, the head of the Data Analytics Department, faces a mounting challenge. His team, composed of 25 analysts, dedicates around two weeks of each month to compiling, cleaning, analyzing, and reporting data from all global locations. This monthly reporting process is both time-consuming and complicated by the varying levels of data reporting capability at Wellington's many sites.

While some locations have access to advanced data management software, others rely on manual data entry and simpler tools, creating a disparity in reporting quality and accuracy. Analysts have noticed an increasing number of errors in the monthly reports due to the high volume of data and tight timelines, and the pressure of a monthly reporting cycle is taking a toll on the department.

As Wellington continues to expand, the demands on the data analytics team are only expected to grow. Alex has identified that shifting from a monthly to a quarterly reporting cycle could reduce the department's workload significantly. Estimates suggest this change could save around 2,000 hours annually for the analytics team and an additional 5,000 hours across the company, allowing analysts to focus on deeper, more strategic data insights instead of routine monthly reports.

The Potential Benefits of Quarterly Reporting

Alex believes that moving to a quarterly reporting cycle would benefit Wellington Supplies in several ways:

- Resource Optimization: Time saved could be reallocated toward more strategic, high-impact analysis, potentially yielding valuable insights for long-term planning.
- Improved Report Accuracy: A quarterly cadence would allow more time for data verification and error checking, likely improving the accuracy of each report.
- Alignment with Growth: As a company with increasing complexity and volume of operations, shifting to a less frequent, more comprehensive reporting schedule may align better with the organization's overall goals for data management.

However, the proposed shift to quarterly reporting has not been universally welcomed within Wellington.

Senior Leadership's Concerns

After sharing the idea informally with colleagues, Alex quickly realizes there is strong resistance to moving away from monthly reports. Thomas Everett, the company's Chief Executive Officer, values the real-time nature of monthly data and believes that frequent updates allow for quick responses to market shifts or internal issues. Margaret Sheffield, a member of the Board of Directors who is known for her preference for detailed oversight, argues that monthly reporting is essential for maintaining accountability and avoiding any surprises in the company's performance.

For members of the C-suite and the Board, there are two major concerns with quarterly reporting:

1. **Loss of Real-Time Data:** Leadership fears that without monthly reports, the company could lose its ability to steer effectively, especially in a fast-paced, competitive market.
2. **Reduced Accountability:** Monthly reporting keeps all locations aligned with company performance metrics and allows senior leaders to identify and address issues promptly.

These concerns have created hesitation among Wellington's executive team, leaving Alex unsure how to move forward. Although he sees the potential for increased efficiency and productivity, he recognizes the significant challenge of persuading leadership to adjust their expectations around data frequency and availability.

The Path Forward

Alex is faced with a critical decision. He believes the benefits of shifting to a quarterly reporting model are compelling, but he needs to determine how to approach the C-suite and Board of Directors with his proposal in a way that addresses their concerns. With little support from leadership as of yet, Alex must consider how he can build a strong case for change while navigating the different interests and priorities within the company.

As head of the data analytics department, Alex wonders:

- How should he communicate the benefits of quarterly reporting in a way that resonates with senior management?
- Is there a way to balance the leadership's desire for real-time data with the need to streamline the reporting process?
- Could a phased or pilot approach help demonstrate the value of quarterly reporting without fully committing the company to the change?
- What allies or supporters within the organization might help him champion this initiative?

As Alex reflects on these questions, he knows that his next steps will require careful planning, a persuasive strategy, and possibly creative solutions to address the leadership team's concerns. He

must consider whether there are ways to modify his proposal to better align with the priorities of the C-suite and Board, or whether alternative strategies could provide the same efficiencies he is aiming for.

QUESTIONS

1. If you were Alex, what approach would you take to present your proposal to senior leadership?
2. What strategies might you use to gain support for quarterly reporting from the C-suite and Board members?
3. How could you address concerns about the potential loss of real-time data? Are there alternative solutions that might meet the needs of both the analytics department and leadership?
4. Who within Wellington Supplies Inc. might serve as key allies for Alex in championing this change, and how would you engage them?
5. What are the risks and potential downsides of moving to quarterly reporting, and how might you mitigate them?
6. What arguments would you make to emphasize the long-term benefits of quarterly reporting over the current monthly cycle?
7. How would you pivot if top management ultimately decides not to allow the change?

