



Data-driven Transformation:

an accessible approach to the digital future

Demystifying the clear path to a digital future



More and more companies around the globe find themselves pondering an attractive opportunity: How do we truly start to base decision-making and business strategy on data? While organizations that were “born digital” seem to do this quite naturally, their non-digital counterparts may feel insecure about how exactly to catch up and safeguard the future viability of their business.

This sense of insecurity is not surprising considering that many born-digital companies are able to leverage data in diverse ways to drive important innovations. In response, leading “analog players” have started investing in data as a strategic resource to achieve success and raise value generation for the organization and its stakeholders – be it in the core business or in a new offering. **Not only has the market shown us that this journey holds real potential but, equally important, it is also accessible to businesses at any level of digital maturity.**

What exactly do we mean by data-driven transformation? Here, we're referring to the aim of many companies to transform by turning the large quantities of data available to them – be it internal or from the market – into an asset. These companies have realized that **data can be leveraged to make more informed decisions, more effectively orient the overall strategy and generate more value for the business.**

A data-driven transformation is the change that these companies need to go through in order to make use of this new asset and address different considerations:

- How do we use, collect, organize or govern this data?
- How do we connect it with our day-to-day business?
- How do we generate engagement and buy-in among users?

This journey addresses broad strategic, technical, procedural and cultural questions, from selecting system architecture to involving people in a way that ensures impact and absorption of a new modus operandi. The transformation offers short, medium and long-term benefits:

- Using data and KPIs to orient the core strategy
- Achieving improvements in processes and efficiency gains
- Establishing strategic capabilities to gain insights, uncover new business opportunities and drive the value proposition.



Read more about our approach to Data-Driven Transformation at [integrationconsulting.com](https://www.integrationconsulting.com).

An accessible transformation



Despite the apparent urgency to act, business leaders are often reluctant to set off on this path due to a mix of apprehension and, ultimately, a lack of understanding as to what the data-driven transformation entails – and what it doesn't. We should point out that much of the buzz surrounding this topic is hype. Starting the data-driven transformation, as we have seen among clients, can be much more straightforward and down to earth than it seems.

There are three main reservations that cause businesses to avoid the topic.

1. We're too disconnected from the issue and won't be able to overcome the initial gap.

This fear stems from the thought that the company is behind in terms of the data-driven solutions it currently uses (if any), resulting in a paralysis to act. However, this perceived “gap” is generally much greater than the reality and very possible to overcome. As we've seen with many companies, the real gap to be overcome rests in securing the will and forward movement needed to start the transformation. Once you've started the journey in a structured way, the targeted changes and benefits gradually arrive and serve as a boost for the business.

2. We simply don't have the resources to invest in this large-scale investment right now.

Added to the misconception that the data-driven transformation demands a large sum of capital upfront, business leaders also worry about risks to business continuity brought about by complex projects involving system architecture overhauls and modernizing the IT infrastructure – which can be quite delicate topics. But this is not how the data-driven transformation needs to work in practice. Different paths exist within this transformation, allowing you to move forward, develop a data-driven culture and evolve as a business without necessarily undertaking large-scale systems changes from the outset.

3. We don't know how to connect the transformation with other business needs to ensure returns.

Despite coming in an abundance of forms, many business leaders view data as an “uncertain” resource in the journey – one that holds high potential yet without any guarantee of success. As in any transformation, this journey will indeed demand both monetary and human investment to achieve objectives and returns that tend to stretch beyond the short term.

As such, it is vital to connect the need for the data-driven transformation with other projects and initiatives that offer returns in the short to medium term. With the right approach, these points can be harmonized and provide the momentum and engagement required to sustain this investment. The key is that any data-driven transformation needs to be carried out at the service of the business – not the other way around.

STARTING OFF SIMPLE

For any business leader seeking to wrap their head around the topic of data and digital, it's important not to get caught up in the technical jargon and overstated complexity often surrounding this topic. The essence of this transformation should be made easy to approach and understand once the reservations outlined above have been addressed. At the same time, the solutions being developed need to offer clear frameworks, accessible language and simple concepts for all the stakeholders involved. If discussions are too “exclusive” and only understood by a few experts, professionals at your company won't be able to put the new approaches into day-to-day practice – and the organization ultimately won't transform.

In our experience at Integration, we've seen that it's most effective to approach this in a simple manner and to start generating movement through practical steps that can be followed by businesses at any level of maturity.

This report provides a **panorama of nine key considerations for achieving success in the data-driven transformation**. It lays out the **key**

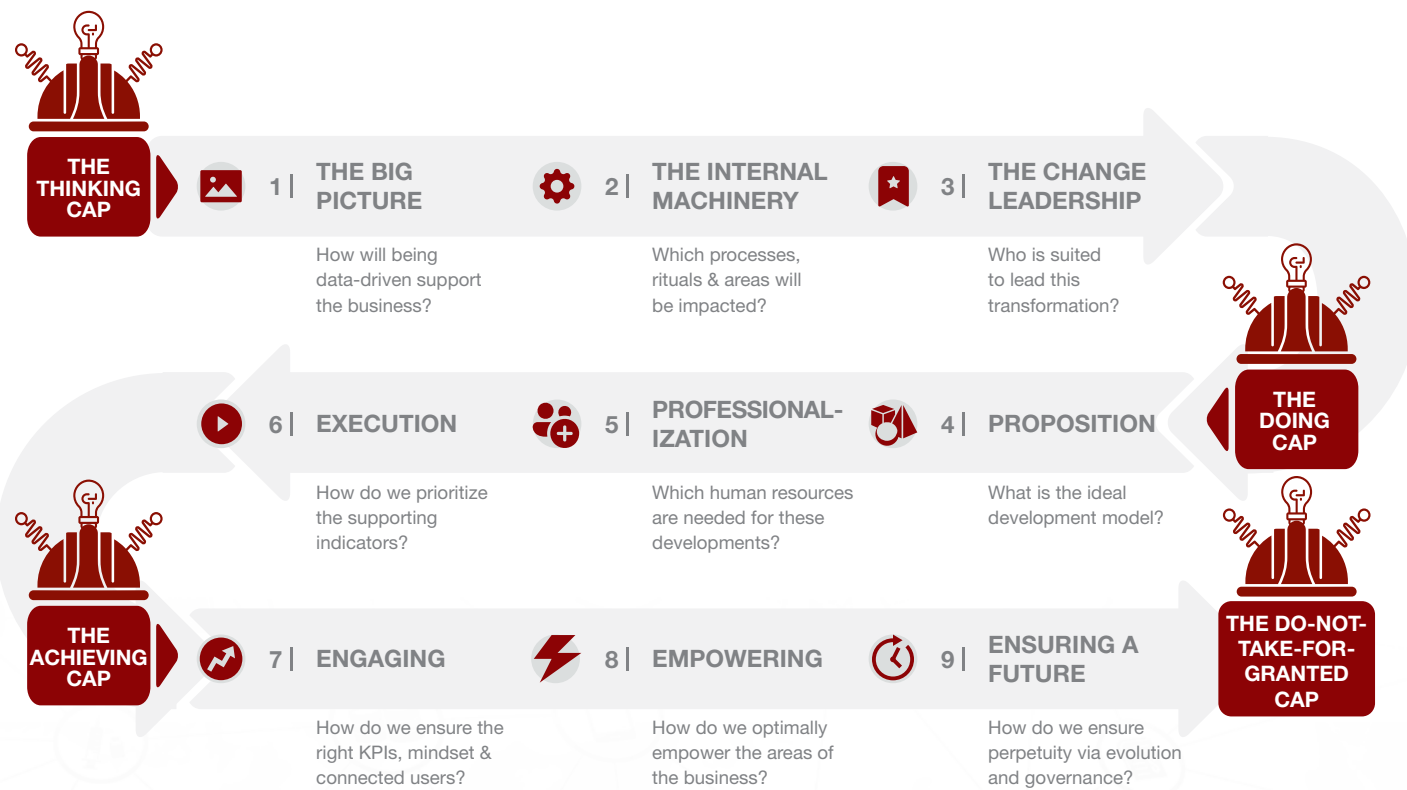
questions, trade-offs and common errors that your business should take into account based on our past experience supporting clients in this endeavor. The best practices presented here draw on well-succeeded transformation journeys and are meant to serve as a guide for newcomers to this topic. To close, the report includes a selection of cases with real-life insights from past projects that supported businesses in their own data-driven transformations.



The digital path ahead

These 9 key considerations for finding success through a data-driven culture outline how companies can establish an adept strategy, start adapting through implementation and effectively adopt changes for the long term.

AN OVERVIEW OF THE JOURNEY



1 Identify the most adept strategy

- 🎯 Key Question
- ⬡ Trade-off
- ⚠️ Common Errors
- ★ Success Factors

KEY QUESTION HOW WILL BECOMING DATA-DRIVEN SUPPORT THE BUSINESS STRATEGY?

As the data-driven transformation should serve the needs business rather than being a goal in itself, careful reflection and alignment with the essence of the business are essential. When starting, the leadership is advised to gain **absolute clarity** as to how exactly this move will **generate benefits and add value**.

- What are our current and future necessities and how can data-driven measures support these?

- What specific advantages can this cultural change bring?

Failing to link the desired data-driven transformation to the overall strategy can easily result in wasted resources as the implemented measures will offer little value to actual business.



In our experience, adopting a data-driven culture in your organization is generally pursued for one of two rather distinct goals – the first targeting internal efficiency gains and the other seeking to turbo-charge external growth.

Inward-facing investments tend to serve as an “entry point” for many companies setting out on their data-driven journey. This approach brings advancements in processes with a focus on sales performance, planning, costs, time, movements, service level, availability, efficiency or even risk planning. **These improvements ultimately facilitate quicker and more effective strategic decision-making.** As the data required for these improvements is often already available, the investment demand is relatively low. The downside, however, is that

inward investments tend to only offer specific control measures and they aren’t exactly game-changing for the overall business.

On the other hand, investments can be pursued with an **outward focus: to grow, capture market share, gain a better understanding of clients or more quickly capture opportunities.** Opting for an outward focus means collecting and managing data to guide both strategic and tactical decisions – based on information about demand, prices, channels, points of sale, traffic, competitors, trends, customer behavior, social media etc. This sort of information will be very relevant for managing business areas such as marketing, sales, trade marketing and innovation. At the same time, it can also offer strategic insights for “fulfiller” areas such as supply chain and industry.



The challenge in this outward focus relates to gathering the required information while ensuring sufficiently high quality and frequency. In our experience, the available sources of this data are often dispersed, poorly structured and lacking a to-from with the internal areas.

Compared to the inward focus, **the potential benefits of an outward focus are greater**

and can offer unquestionable value for the business down the road. This means that investments into an outward-facing data-driven journey will demand a longer-term view with more technically advanced professionals supporting this transformation – such as data scientists and engineers as well as data providers.



The second trade-off invites the leadership to consider whether a disruptive approach targeting innovation or an incremental approach targeting sustained improvements will be a better fit for the current state of the business. These are distinct pathways that will demand very different approaches to the data-driven transformation.

Through the **disruptive approach**, leaders grant engineers and data scientists freedom to **generate insights and identify opportunities for the business and alter the status quo in the most objective, bottom-up way possible.** The guiding question here is: “What does the data say?” – irrespective of the structures that already exist internally. By implementing creative new teams and formats with access to data, value is added through innovation, data products, discoveries and new indicators that deliver efficiency and new business paths. We should point out that this more technical approach requires a higher degree of maturity, and value will only be effectively generated once there is already

a sufficient amount of data available for technical experts to develop advanced solutions.

The **incremental approach** is more suited to businesses with clearly defined core projects already in place that would benefit from **more refined project management** through data-driven indicators, dashboards and rituals. The guiding question here is: “What short-to-mid-term improvements do we seek?” – with more focus on driving value generation based on the current business reality and objectives. Also, rather than relying on professionals with a technical profile, the incremental approach calls on the involvement of internal users such as business analysts and managers. In general, the incremental approach is a more concrete call to action that can be put directly into practice.

In either case, the “right” trade-off to choose will become clear once you’ve defined the specific role that the data-driven transformation will play in furthering your business strategy.



COMMON ERRORS



- Succumbing to pressure without having a clear objective strategy
- Incorrectly sizing the needed intensity of investment

Succumbing to pressure without having a clear objective strategy

At this early stage, it is important to avoid a number of errors that could cause the further transformation to lose steam.

The first is frequently committed by more traditional companies feeling pressure from digitally adept competitors such as start-ups, those born digital or those that are more agile and innovative. It’s quite easy to feel existentially challenged in this context: with the market constantly betting on newcomers, there is a sensation that traditional businesses will fade into oblivion in the face of disruptive technologies. This leads company executives and shareholders to invariably feel they need to act as quickly as possible – resulting in a rash decision to go digital by boosting tech, investing in data and promoting a data-driven culture, but without much clarity in terms of how or for what purpose.

Investing in a data-driven culture is no different than making any other type of strategic investment: it’s an enabler for capturing a clear and quantified business opportunity. While misguided objectives or execution errors can heighten the risk of poor returns, so too can a lack of readiness on the part of the company. In this context, **it is imperative to ensure alignment on this strategic vision among the relevant stakeholders.** As transformations of any sort are long term in nature, obstacles will invariably appear along the way, demanding that

the leadership be aligned from the outset in order to avoid a number of risks:

1. Debate over de-prioritizing the investment
2. Misalignment about the value that the area is meant to generate
3. Discrediting evolution and progress achieved up to that point

Incorrectly sizing the needed intensity of investment

Another common error we have seen occurs when leaders treat the data-driven transformation as a one-off project with a start and endpoint. This overlooks the fact that **transformations are perpetual cycles that demand a continuous flow of investments supported by growth along the way.** This reality needs to be clear for the stakeholders involved – as unappetizing as such a long-term commitment to invest may be to some.

The data-driven transformation is not a sprint to be achieved at the end of the following fiscal year. This means the leadership will need to find a sweet spot for investments that corresponds to the profile and strategic necessities of the business. Ensuring alignment across the company for incremental investments made over the long term is far more effective than simply “throwing money at the problem” with an over-dimensioned upfront investment.



2 Calibrating the internal machinery

- Key Question
- Trade-off
- Common Errors
- Success Factors

KEY QUESTION WHICH PROCESSES, RITUALS AND AREAS WILL BE IMPACTED BY THE TARGETED CHANGES?

Once clarity is reached as to whether the business needs an inward-facing data-driven strategy with a focus on boosting efficiency or outward-facing one with a focus on growth – be it via disruptions or incrementally – the next critical question is: Where should we start? Which areas do we want to be impacted by our data-driven transformation first?

Initially, it may seem that all areas of the business would be viable candidates, from marketing and finance to sales and logistics. However, **setting focus areas at this stage of the overall transformation is crucial.** The first target area (or areas) should be the ones with the acutest shortcomings paired with a potential to quickly generate added value as well as ensure the longer-term transformation keeps its momentum.



From our experience, a sensible basis for prioritizing actions starts with identifying if a focus on specific areas of the business or on governance as a whole is more suitable to your strategy.

1. Taking a **vertical approach** entails addressing a critical area of the company first – leveraging visibility over the area's activities and performance.
2. A **horizontal approach** is broader in essence and directly addresses corporate governance – leveraging visibility over objectives and indicators to provide a broader perspective.

Some considerations can be used as guidance for deciding if a horizontal or vertical approach is most suitable for your business. For organizations pursuing a better understanding of their business reality (typically those that are less mature in

the management and use of data), a horizontal approach will be a better fit. For those seeking to achieve specific operational advantages, a vertical approach is the right choice.

A retail client we supported on their data-driven journey urgently needed to improve decision-making processes among top leadership, for which a control tower with indicators was recommended. This horizontal approach didn't target any specific area but was meant to impact leadership across the whole company. A special dashboard was created for each leader to review on a weekly basis, using the indicators presented there to make more informed decisions about client and employee satisfaction, service level, ROIs, financial health and competitiveness.

There is also an **important cultural factor at play** here that should be considered. If the business' overall strategic objective is to promote broader transformation involving:

- a new strategy,
- a new vision for the company or
- a new mindset

that connects diverse areas and stakeholders – from the leadership down to the teams – a horizontal vision is suggested. On the other hand,

if the objective of the transformation is to

- progress to a new level in a specific practice or function,
- sustain a particular strategic project or
- develop a new capability that did not exist before,

a vertical approach will be better suited. While the approaches are not exclusive, pursuing both can easily lead to disputes over resources as they rely on similar teams and information sources.

COMMON ERRORS

- Setting indicators without a connection to existing governance
- Seeking to cover everything and overlooking small/good indicators

Setting indicators without a connection to existing governance

It's important to bear in mind that any new tools or indicators you plan to create through the data-driven transformation plan should be specifically tied to the business needs at hand. In order **for a dashboard to be effective, it must respond to a given decision-making process – which we call rituals.**

One of the best practices that we've identified in this regard involves taking a pre-existing ritual and asking:

- What needs does this ritual fulfill?
- What type of decisions is it used for?
- How often do decisions need to be made here?
- Who participates in this ritual?

The responses to these questions can be used to **design a data-driven solution focused on the specific reality at your organization.**

The benefits of this approach are clear:

- Adoption of the new solution will be much higher
- More value will be added and with greater impact
- Precision in reaching your objectives will improve

At the same time, it is important to establish this connection to the real practices and necessities of your organization from the very outset to avoid unnecessary adjustments down the road.

Seeking to cover everything and overlooking small/good indicators

Embedding a data-driven culture in your organization is not simply a one-off project but a step-by-step transformation that will deliver incremental benefits with each advancement. As such, knowing which levers to focus on at the beginning is critical. Organizations can quickly get lost by spreading their efforts too thin with an overabundance of (shallow) indicators.

The best practice that we recommend at this stage is to concentrate: **start small and add more indicators little by little** as the organization adapts and sees gains. Experience shows that being overly ambitious by introducing dozens of indicators at the same time is ultimately unproductive:



- Implementation will be complex as each indicator demands time, documentation, validation and some back and forth
- Certain indicators may not be set correctly at the start – and the more there are, the harder adjustments become
- Resistance can be minimized by adopting a gradual approach, as change generally bears psychological costs

Taken together, the key message here is: **Keep things simple, especially at the beginning.** Even though the journey as a whole may be broad and involve many changes, there is nothing preventing your organization from starting small and focused, provided alignment has been reached in terms of the essence, scope and strategic objective of the data-driven transformation.



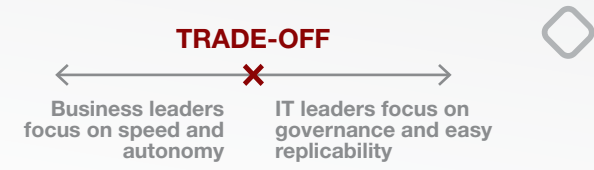
3 Defining the data-driven leaders

- Key Question
- Trade-off
- Common Errors
- Success Factors

KEY QUESTION WHICH LEADERS ARE BEST SUITED TO SPEARHEAD THE DATA-DRIVEN TRANSFORMATION?

Initial proposals to transform a company by leveraging data for promoting the business and decision-making may be inspired by technical considerations from IT. In other cases, they can also be a response to specific business needs brought up by the leadership. Either way, **deciding which area should lead this transformation is not necessarily obvious.**

While some organizations may believe that professionals already specialized in IT should guide the rest of the company along this journey, others will want to select leaders from one of the business areas, with their more developed abilities to manage and execute projects. Both approaches offer distinct advantages, but each also comes with its own tradeoffs.



- Business leaders**
- + greater speed, autonomy and solutions better tailored to the needs of the business
 - less ability to replicate and create scalable solutions
- IT leaders**
- + more technical refinement in solutions and ability to replicate
 - risk of reduced applicability across business areas and "over-technicalization"

supporting the business in the best way possible, they can also better define how indicators should be read. Having leaders from the business area in the driver's seat will facilitate the process of setting critical priorities for the first phase of this transformation as well as optimally customizing the solutions.

The clear benefit of selecting **leaders with experience in the business itself is that they tend to be more attuned to the overall strategy and the needs at hand.** With a finger on the pulse of the business, they are aware of the priorities and importance of the indicators. The areas know how to apply indicators and, as these are made for

On the other hand, placing **IT leaders in charge is the best way to ensure excellence in executing the new solutions:** from data governance and curation to ease of future replication. IT professionals are not, however, as familiar with the intricacies and demands of the business itself. While they may not be as apt in translating these needs with the same degree of fine-tuning, they will ensure that the data-driven transformation itself progresses based on technically robust



solutions – an expertise that business leaders are unable to match.

Whichever path is chosen, some prerequisites must be in place first. Business areas will only achieve success if IT has provided them with a conducive tech environment along with training to ensure business analysts know how to use the tools provided. Setting the IT area up for success means providing sufficient resources for gaining a deeper understanding of the necessities of the business, for executing the data-driven model and for maintaining it.

COMMON ERRORS



- Limiting transformation leaders to only the business or to the IT area
- Placing too much value on technically robust models at the beginning

Limiting transformation leaders to only the business or to the IT area

At the beginning, your organization will need someone in charge of leading the data-driven transformation – first and foremost, to establish a set of premises to orient the journey ahead. Once initial advances have been made, keeping the transformation only in the hands of business or of IT leaders can create difficulties.

If professionals from the business areas remain in charge for too long, they may face obstacles in replicating solutions and wins down the road – be it due to a lack of best practices or a platform that isn't scalable. On the other hand, leaving the entire journey in the hands of IT professionals will ultimately limit the effectiveness of data-driven solutions to respond to the necessities of the business. This can lead to the very real risk of shelving the entire endeavor – after having invested millions – due to a lack of clear benefits being fed back to the business.

As companies often don't have sufficient resources to ensure IT can optimally provide high service levels across the board, business areas typically end up assuming the role of key tech sponsors in this transformation. One effective remedy here is to **set up data lakes**. These will only require IT teams to provide raw (structured) data on a consolidated platform while business areas are trained to “consume” this information to generate the needed KPIs, data visualizations and analyses.

Placing too much value on technically robust models at the beginning

Quickly implementing simple data-driven solutions that respond to specific business needs and generate benefit early on is key. Besides demonstrating to the leadership that investments into the data-driven solutions were worthwhile, this will also generate the payback, experience and motivation to proceed with further steps in the transformation.

Experience shows that **placing excessive focus on the technology itself in a quest to ensure robustness and the best possible practices consumes time**. Elevating the sophistication of your solutions may not be the right approach early on – it demands more expertise and more specialized professionals.

Overinvesting time and effort into refining the technological aspect of the solutions the business



needs can leave you with a complicated and drawn-out transformation process, or even exhaust stakeholders and cause the company leadership to question the original decision. One of the best practices that we have seen involves operating on the basis of an **MVP (minimum viable product) approach: Focus on quick and practical solutions that are capable of adding value early on.**

A final pitfall worth mentioning is the tendency to either create “homemade” models within the business areas or leave it completely up to IT. Homemade solutions are generally limited in terms of scalability: When attempting to replicate a past success case, leaders often realize they have to start from scratch all over again. On the other hand, models developed by IT can often be highly customized and complex, requiring months to develop and leaving the business with an over-technicalized solution.

While there is no one-size-fits-all formula for determining the ideal balance for leading this process, both sides certainly need to be involved to some degree. **Appointing a CIO is one highly effective solution**, as someone with intimate knowledge of the business and in a position to properly define the right balance in the given context.

Another recommended solution for companies with a clearly defined data strategy in place is **creating an intelligence area**. These are highly effective at addressing the trade-off between IT and business as they merge technical knowledge (e.g. data scientists, engineers etc.) with business expertise (e.g. analysts). Often situated under the umbrella of digital or finance to maintain greater neutrality, intelligence areas assume the responsibility of leading governance rituals and centralizing the transformation. They ensure that the solutions being developed remain close to the business and to leadership while incorporating the required technical skills.





4 Finding the right model

- 🎯 Key Question
- ◇ Trade-off
- ❗ Common Errors
- ★ Success Factors

KEY QUESTION

WHAT IS THE OPTIMAL DEVELOPMENT MODEL FOR INTRODUCING THE PLANNED DATA-DRIVEN TRANSFORMATION?

Many business leaders are under the impression that any sort of digital transformation they pursue will represent a rupture from former ways of doing things and require implementing new approaches to business. In terms of models for developing software, systems and digital

products, this is typically equated with adopting a so-called agile approach. However, the most effective data-driven transformations we have experienced are those that **strike a balance between agile and more conventional ways of developing solutions.**

TRADE-OFF



While agile approaches have proven their worth and hold the potential to add unquestionable value, when developing raw business indicators, **factors such as precision, concept alignment and even format still have much greater weight in the equation – which are provided by more traditional models.** As such, the trade-off to be considered here is how quickly and to what degree agile models for developing solutions should come to complement (or replace) more conventional approaches.

Companies expanding their capability to make decisions based on data must **first have a solid foundation in place:** correctly setting up systems, data flows, policies etc. that create a sustainable technology environment. Like constructing a building or piece of machinery, end-users will only see real results (and be able to provide feedback) after some time and progress is made.

COMMON ERROR

- ❗ Completely basing development on the agile approach

A common error that we have witnessed arises when companies place all of their eggs in one basket. More often than not, they put them all into

the agile basket, convinced that the most modern way to approach development must surely be the best. In reality, however, when companies

are starting to produce a new data-driven product from scratch, this initial ramp-up phase demands more time and structure – making the agile approach anything but the best choice.

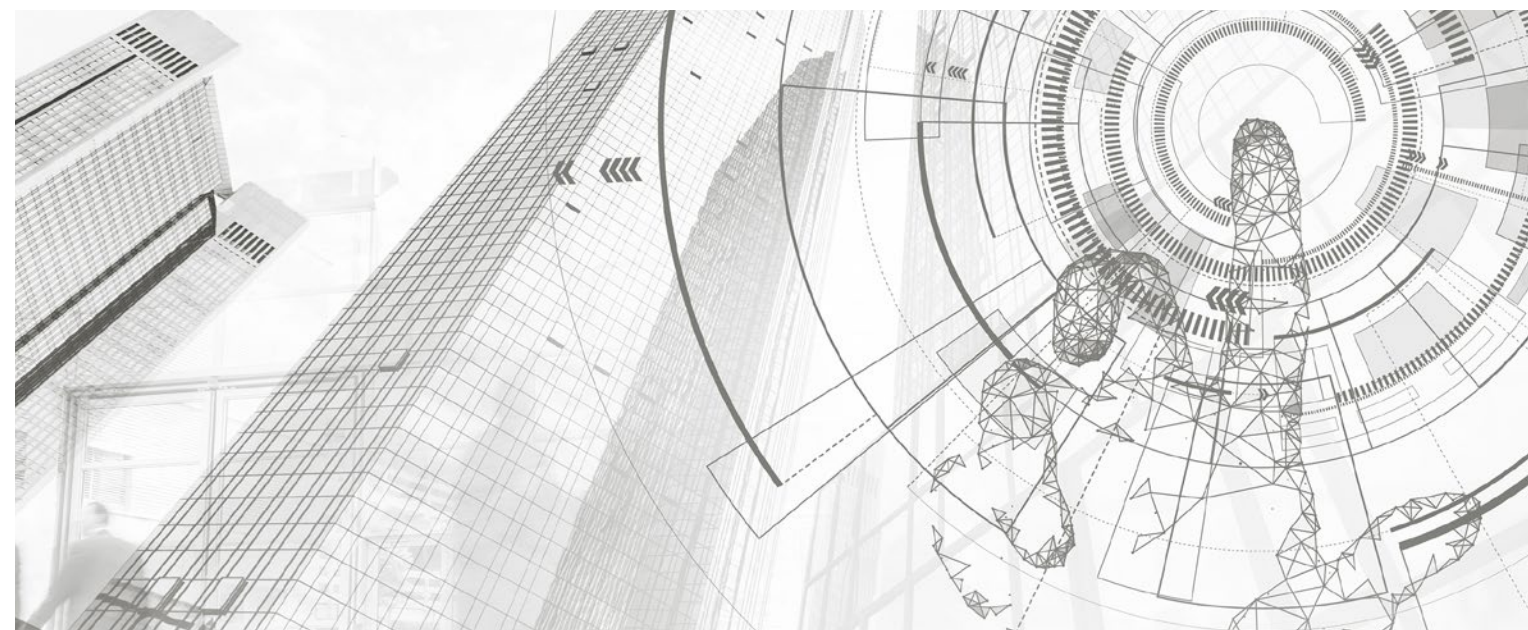
Pursuing the common 15-day agile cycle makes it impossible to collect feedback from users – especially as the "product" doesn't even really exist yet. When at the beginning of the transformation journey, the entire process of creating internal data-driven solutions such as a data lake or an MVP will deliver better results using a more traditional approach to developing data-based solutions.

While agility is certainly a "must-pursue" objective and a desired outcome of your data-driven transformation, **sticking to a more conventional approach at the beginning while weaving in agile elements** along the way will ensure that the development of your new solutions and tools is not needlessly rushed and that results generated secure buy-in from stakeholders. Agile approaches to development tend to start bearing fruit only after some data-driven solutions in the form of MVPs have been successfully introduced. This will also grant you the time needed to collect feedback from users, align concepts, make adjustments and build the agile cycles mentioned above.

A client in the retail pharmacy sector we supported in getting its data-driven transformation back on track had opted to fast track the move to a purely agile organization. This hasty decision ultimately failed to satisfy the expectations set out by the C-level, which had been seeking to gain visibility as to when new solutions would be completed and ready for use. Generally unsuited for fixed and long-term deadlines, the agile approach failed to deliver.

For company presidents under pressure to see tangible results from a new, long-term project with a significant time and investment endowment, an agile organization can cause anxiety, stress and headaches. To remedy this, our team supported the client in introducing a mixture between an agile and a more traditional approach to finally get the transformation on track and provide the C-level the visibility it was seeking.

The take-away here: While trial and error can certainly bear results in the long term, it is essential for company leadership to be patient and amenable to adaptation until the right model for development has been identified.





5 Knowing how to professionalize

- 🎯 Key Question
- ◇ Trade-off
- ❗ Common Errors
- ★ Success Factors

KEY QUESTION WHICH HUMAN RESOURCES WILL BE NEEDED TO PUT THESE DEVELOPMENTS INTO PLACE?

Whenever considering changes that involve data or digital approaches to doing business, the matter of human resources can be a delicate topic. In virtually any place in the world, the qualified digital professionals needed to facilitate this are extremely expensive on account of their scarcity. For the solutions envisioned in your transformation to come to life, a slew of technical capabilities – ranging from programming, data

engineering and data governance to UI, UX, BI and cloud computing – must be joined together in a dedicated data-driven cell at the company.

As such, the formidable challenge faced by most companies starting this journey is: How do we attempt to bring together these extremely costly resources in a way that will allow for initial gains to be achieved without breaking the bank?



The trade-off that your data-driven model must address is how much to keep internal and how much to hand over:

- Outsource to third parties to gain speed and cut down on staff costs versus
- Invest in internal capabilities to gain precision and retain key expertise

A response to this challenge we have found to work well with clients is to only contract out necessities that are highly specific and more operational.

At the same time, it is advisable to **guarantee that any solutions demanding data intelligence**

remain in-house – from defining the logic behind calculations and understanding data sources to specifying how transformations are done. Losing out on these key sorts of expertise will certainly be felt in the future, i.e. when it's time to do maintenance, evaluate the model in place, add additional indicators, address questions regarding the calculated indicators etc.

By outsourcing core knowledge, besides losing essential expertise, your business could also run the risk of your highly anticipated data strategy either failing altogether or falling into disuse, thereby losing its value and purpose.

COMMON ERROR

- Outsourcing the task of calculating indicators, leading to a loss of expertise and difficulties maintaining efficient curation

One temptation that leads many companies astray is to simply contract product development out to a third-party provider, thereby taking a large part of the burden off of their shoulders (and the books).

Choosing this option comes with two critical risks that should first be taken into consideration:

- Depending on the amount of time for which an external team will be needed, a third-party solution could very well end up being more expensive than having these resources in-house.
- Dedicating an outside team to developing solutions for your business will invariably lead your organization to losing precious knowledge along the way.

The more a company relies on assistance from third-parties, the greater the risk of ending up with data models and architecture that are a “black box” without an owner, potentially compromising the continuity of the data-driven transformation

along with future improvements. Additionally, we have also seen the balance between internal and external resources driven by accounting considerations. As this process touches on the company's headcount and CAPEX, it may often seem easier to secure budget approval by resorting to third parties. However, this move ends up essentially distorting reality as the decision should be a technical rather than a financial one.

Lastly, we must not overlook the importance and influence that an internal team dedicated to the data-driven transformation represents culturally to the company. This should be **approached as a future investment in the strategy**, sponsored by the C-level and highlighted as a pillar of digitization for the business. We have seen successful cases in which the new data-driven area played a neutral as well as central role in educating employees on a daily basis and building the transformation bottom-up.





6 Planning for successful execution

- Key Question
- Trade-off
- Common Errors
- Success Factors

KEY QUESTION **HOW DO WE PRIORITIZE THE SUPPORTING INDICATORS TO MONITOR PROGRESS OF THE TRANSFORMATION?**

Common sense dictates that effectively monitoring performance and outcomes should be done using “few but good” indicators. However, the complexity inherent in some business operations does not allow reality to be clearly defined as a simple one-pager.

Take, for example, businesses in the retail apparel sector that must plan future collections, design new models, produce, sell, distribute and monitor the performance of current collections – all in parallel. Each of these complex processes is vital for the business and there is also an entire machinery of internal governance needed to

maintain visibility over each one.

Knowing how to prioritize among a long list of options is therefore a consistent challenge.

Even when choosing to focus on a single area, ritual or process, there will still be an abundance of possibilities. Added to this are technical considerations that bring in another layer of complexity to your supporting indicators. These can range from accessing primary information, automating, ensuring the correct rules of business, knowing how to do comparisons or presenting indicators an effective manner.



At the early stages of the data-driven transformation, leaders need to define which indicators to prioritize and, once again, decide whether speed or depth will be more suitable for achieving the objectives of the business and data strategy as well as the reality of the organization. This trade-off considers the following points:

- Prioritizing the elements that generate the most value for the company and its processes for the business area(s) versus
- Focusing on elements that are easier to implement for the technical support area.

In an ideal world, we would be able to identify the point at which both of these overlap most. In many cases, however, we see the leadership at companies spend too much time and effort discussing and striving for an “ideal” set of indicators. A **best practice** we recommend to avoid this is **taking indicators that are already available (even if not perfect) based on the data at hand and getting a head start** – implementing them using the existing governance to make progress in the company’s new data-driven approach.

Through the day-to-day practice of testing out this initial set of indicators, the organization will evolve in the transformation by learning how to extract insights and use these as a basis for decision making – while also evaluating effectiveness. In this context,

the C-level plays a critical function for setting meta indicators, defining priorities and objectives and, at the same time, providing the organization with the freedom to design a dashboard of indicators that are best suited to achieving them.

COMMON ERRORS

- Focusing only on overall outcomes and results
- Failing to incorporate actionable indicators that permit adjustment

In terms of adopting data-driven indicators, progress tends to accelerate when the leadership is able to set up dashboards with **indicators that monitor activities, performance and objectives within a single process** – rather than only selecting those that measure whether or not overarching business objectives have been achieved. For example, the leadership could consider the sales funnel process, establishing a dashboard of targeted and interrelated indicators such as:

- quantity of proposals
 - conversion rates or
 - number of clients
- instead of indicators that assess broad objectives such as:

- sales volume
- gross margin

Another advantage is that more targeted indicators within a single process will allow for concrete adjustments and actions to be taken along the way. Indicators seeking to provide information on broad objectives often merely serve as “posthumous” alerts that do not allow for corrective adjustments to be made in the same manner.

At the end of the day, the old rule still applies: Few but good indicators are what you should seek to establish. The challenge, however, lies in knowing how many can be considered few and which can be considered good.





7 Ensuring engagement

- Key Question
- Trade-off
- Common Errors
- Success Factors

KEY QUESTION
HOW DO WE ENSURE THE RIGHT KPIS, MINDSET AND CONNECTED USERS?

After developing and implementing your transformation strategy, the next phase of the journey tackles the matter of adoption: handing over the data-driven solutions that have been created to the end-users – the internal professionals who will “consume” the data being offered. Having a dashboard ready to use is one thing but actually **getting your users accustomed to effectively using it in their day-to-day routines is a different challenge altogether**: making sure they are looking at the indicators, making decisions based off of these and applying insights to guide the overall business.

The general difficulty that businesses encounter here is that **this transition is not necessarily 100% natural for users to adopt**. Many may

already be used to conducting business using a pre-existing set of indicators – which may be much more basic. Despite having successfully advanced through all of the previous steps, this switch-over among users may still require special attention and actions.

If you’ve already ensured prior engagement, chosen the right teams and set out an implementation and pilot strategy, this will certainly go a long way in making the process of adoption much smoother and more natural for your users. The challenge posed by this step, therefore, has a lot to do with how well you’ve ensured a connection with your professionals during the previous steps. So now, how do you accelerate engagement?



Implementing new dashboards will often require making other associated changes. It may mean introducing new indicators or forms of monitoring the business that did not previously exist or even replacing the way professionals are used to approaching indicators with one based on a platform that’s more modern, user friendly, automated or efficient.

The trade-off that companies must consider in the first part of the adoption phase is:

- **introduce an entirely new set of indicators or**
- **update the way that you deal with the existing set of indicators.**

Based on our own experience, opting for a mixture of both is optimal. Moreover, best practice suggests

that you should initially start out by updating the approach and subsequently introduce new indicators. The risk of “going all out” with a new set of indicators is that this may cause an unmanageable disruption in the day-to-day work of your professionals and negatively impact the way they analyze results.

Dealing with a new format, a new platform or unfamiliar indicators can easily be interpreted

as being overly complicated. You’ll need to do much more convincing and offer much more training to get everyone on board and aligned. While striking a balance between new and merely updated indicators is important here, initially, simplicity should be prioritized during the adoption phase. This will ensure a sufficient degree of continuity with the way things were generally done before.

- COMMON ERRORS**
- Keeping old and new indicators in parallel use
 - Failing to connect new KPIS to the existent governance model

Keeping old and new indicators in parallel use

One common error that we have seen relates to excessive duplication: maintaining both the old format and the new one for a prolonged period of time. In such cases, areas continue to have results generated the “old way” – via Excel and emailed around the organization – while concurrently utilizing an online platform that automatically generates the same results.

The risk is that, as long as the conventional way of viewing results remains present, the new system will invariably be marginalized. Overcoming this tendency simply requires you to put a strategy into place for activating the new and deactivating the old as soon as users are ready in order to ensure that engagement and adoption are more effective.

Failing to connect new KPIS to the existent governance model

Another common error we have seen occurs when companies implement a large number of

indicators with new reports and dashboards yet fail to connect these to the established culture and processes inherent to the organization. The critical point to stress here is that, **when implementing your KPIS, they need to be aligned with changes to your governance model.**

Moreover, granting user areas free reign in making their own indicators very commonly results in the creation of parallel indicators, often leading to confusion and inefficiencies. The solution we have found effective for countering this tendency is **introducing a process of curation**: having someone responsible for looking at all the indicators being created across all areas that have access to data.

Any indicators merely created to generate “visibility”, yet without any practical follow-up actions to be taken as a result, don’t add any real value. Such disconnected indicators are unable to generate engagement or connection among stakeholders for effectively guiding decision-making.



The essence of an indicator is to evaluate current states, to establish a channel to communication within the organization and, finally, to guide actions. To fulfill this essence, your indicators need to set the stage for taking action, with a fixed agenda, clear roles and connected goals.

There are a few best practices worth highlighting to address these trade-offs and common errors. We have also found it useful to **segment user groups that will be using the indicators in a different way**. For one client we served in the retail sector, a set of indicators was developed that could be analyzed by different user groups with distinct perspectives and needs: store managers, the regional supervisor in the field and even up to the directors and CEO of the company. Even though everyone was considering the same set of indicators, the way they reviewed and interpreted them was quite distinct: they had different decisions to make, they needed to see them at different intervals etc.





Different user groups will demand different interfaces, meaning that your adoption strategy should also be segmented accordingly. For another industrial client, it was possible to set up indicators with an interface that served the needs of the factory-side professionals and a different interface for the executive level. Regardless of the industry or type of company, the same premises will apply.

In terms of corporate culture, some organizations will exhibit a high degree of discipline and diligence capable of promoting the effective adoption of their new data-driven culture and solutions. Regardless, **few approaches have proven more effective for driving adoption and change across the organization than the C-level exerting an adequate amount of pressure and defining goals for different teams to satisfy**. Over time, this will support the

associated strategies for change management, communication, transparency, calls to action, objectives and performance evaluations (from the leadership down to the team levels) and ensure that the transformation is here to stay.



8 Empowering your business areas

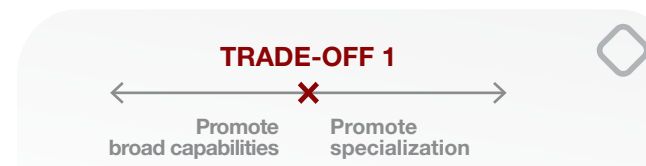
-  Key Question
-  Trade-off
-  Common Errors
-  Success Factors

KEY QUESTION 
HOW DO WE EFFECTIVELY EMPOWER OUR BUSINESS AREAS THROUGH THESE NEW DATA-DRIVEN SOLUTIONS?

In the context of the data-driven transformation, empowering areas of the organization means allowing your intelligence teams – analysts, coordinators or managers that analyze data on a daily basis – to have “premium” access to the data solutions you’ve provided and have the skills to use them beyond what they were used to. This entails **granting access to raw data that will allow them to create new visualizations, carry out deeper-level**

analyses, understand the underlying cause of a poor indicator and more.

Empowering your business areas is about access and capabilities: unlocking the potential embedded in more profound contact with the data being introduced through this transformation journey. There are, however, different approaches and modalities of empowerment that will vary depending on the needs of the businesses and your organization.



The trade-off here is between spreading this empowerment among a broader range of professionals or focusing on specialists to gain agility. More specifically:

1. **making a technical capability a prerequisite and skill expected of the entire team** of business analysts, e.g. being able to program or
2. **creating internal specialists in the area responsible for managing data.**

While both paths are certainly possible, they each come with their own set of trade-offs. Deciding that a technical capability will be a requirement for an entire area is inherently a longer process, requiring you to implement programs for professional

training and the employee journey, to adjust your hiring criteria and update your model for performance evaluations. At the same time, going broad will usher in a greater and more profound transformation for the long term while also increasing the organization’s ability to innovate.

Opting to simply assign a team of specialists to the task will be much faster, facilitating internal communication and governance with the team responsible for the overall data-driven transformation. On the other hand, this entails creating a relationship of dependency on certain resources, which can lead to bottlenecks in the future.



TRADE-OFF 2



- A balance must also be struck between
1. **centralizing this process to ensure sufficient data governance and scale** or
 2. **granting a higher amount of freedom so that the business areas can advance and adapt.**

We've experienced both extremes in past projects, along with the impacts that each entails. More complex organizations with a large number of areas, diverse business units and international operations are generally advised to grant their business areas a greater degree of liberty to act in order to avoid a rebound effect that can temp these areas to create their own

parallel data channels. On the other hand, this decision can very well cause the area leading the data-driven transformation, e.g. centralized business intelligence, to become less influential and more operational, thereby reducing its power to transform the organization as a whole.

The essence between these two trade-offs lies in allowing your business areas to adopt the newly developed solutions. It also means that these business areas should feel that they are the owners of these new solutions, opening the field to collaboration, co-creation and faster adoption.

COMMON ERROR

- Providing insufficient support and training to professionals

One of the common errors we have seen related to empowerment stems from failing to provide a sufficient degree of training and support to the involved business areas.

As you are mixing technology and business, your **user areas will need to be provided with**

the appropriate skills to take advantage of this "premium" access and skillfully deal with the new tools on offer. This demands a certain degree of training and a certain professional profile among the involved teams – which needs to be attended to during the implementation process.

9 Aiming for the future

KEY QUESTION

HOW DO WE APPROACH EVOLUTION AND GOVERNANCE IN A WAY THAT ENSURES THE PERPETUITY OF THIS TRANSFORMATION?

One of the success factors for **ensuring perpetuity involves incorporating the data-driven transformation as an ongoing process.** This means creating a new area and fixed team of professionals with a distinct set of roles, responsibilities, career paths etc., guaranteeing that you have the control towers in place to accompany and support the business along this journey.

Companies that view the data-driven transformation as a project with a start, middle

and end point seriously heighten the risk of ending up with an unsustainable and short-lived initiative. While this transformation does, of course, demand initial capital expenditures – to get things started, make strategic choices about which paths to take and execute your initial ramp-up – this transformation does not simply come to a tidy conclusion the day that the final indicator has been implemented.

SUCCESS FACTORS

- Treating the transformation as a continuous journey, not a project
- Having the data area always focus on updating systems

Experience shows that **any data-driven model must respond to constantly changing demands, product developments and requirements for support.** The dashboards or solutions that were created at the start will need to be reviewed accordingly and adjusted on a regular basis. In essence, data should always focus on connecting technology innovations to new demands that generate real value for the business.

All of this demands a certain degree of commitment to maintenance and upkeep. While you may have a clear path for reaching the ramp-up phase, once achieved, there will still be roles that need to be guaranteed with people that need

to be dedicated to the maintenance and evolution of this data strategy.

Looking at the bigger picture, data represents a critical and strategic resource for the company, one that will only gain in importance over time, especially as your data-driven transformation takes further root. As such, it should be viewed the same as the other assets and capabilities of the business rather than merely a back-office or support area.

As a critical pillar of the company that serves to generate innovation, value, revenue and even new business models within the overall

- 🎯 Key Question
- ◊ Trade-off
- ⚠ Common Errors
- ★ Success Factors



strategy, the data-driven transformation will only be sustainable and realize its full potential if it becomes part and parcel of business strategy discussions in general. This means reflecting on key questions such as:

- What is the area's reason for being?
- How will it strategically contribute to advancing business?
- How can we leverage the potential value of this now-established capability in the future?

To effectively do so, it will be fundamental to **embed data with the business' strategic framework and design a strategic roadmap that will drive the evolution of the area.** This will go a long way in ensuring that the data-driven model becomes a pillar that sustains the business as well as long-term strategic growth. Down the road, this means inviting the data area to occupy new roles within the organization, develop new forms of knowledge, create new profiles and support the company's innovation strategies.



Cases

The following selection of cases from diverse industries presents real-life insights drawn from our past experience. These were projects Integration worked on to support businesses at various degrees of digital maturity in pursuing and finding success in their own data-driven transformations.



SECTOR: **RETAIL PHARMACY**

LEVERAGING DATA TO GAIN VISIBILITY

CHALLENGE

A lack of granular information about store performance – management, inventories, customer care, staff capabilities, employee satisfaction – was impacting the effectiveness of decision-making at different levels of the company management at a leading retail pharmacy chain.

APPROACH

The transformation needed to start by boosting visibility of information regarding store operations – from store manager to the CEO level. To do so, two key considerations were assessed:

1. Which areas have the most direct impact on the business (store management)?
2. Where can we identify the greatest lack of information organization?

RESULTS

- Ensured **democratization of information**
- Greatly improved **quality of management**
- New control tower was implemented allowing regional managers to **improve the administration of stores** under their responsibility
- **Basis for making effective decisions** improved significantly for managers across different levels of the organization
- Management initiatives became **more grounded in real necessities** and sales processes improved

 SECTOR: **DIGITAL MARKETPLACE**
ENABLING THE TEAM THROUGH DATA

CHALLENGE

This leading online marketplace sought to boost the efficiency of its commercial team to enable an intense growth strategy. With the fast-growing portfolio of sellers and the need to increase customer service while driving category strategy for growth, the commercial team lacked streamlined processes, governance and a data-driven foundation to perform effectively.

APPROACH

The commercial routines needed to be redefined by leveraging available but non-activated internal data in order to provide team with more insights for actioning information.

The business, BI and IT teams were connected to find the best solution in view of KPIs prioritized based on two criteria (effort versus value). Finally, capabilities and responsibilities were defined with the commercial area for more accountability.

RESULTS

- Redefined business area capabilities and job descriptions to **spread analytical capabilities** among the team and increase efficiency
- **Defined main KPIs** to drive the business transformation in connected with the strategy
- KPIs were organized into dashboards and reports with **clear rituals and responsible individuals** for analyzing and making decisions
- KPIs were prioritized based on **business needs and data maturity** within the organization

 SECTOR: **FASHION & RETAIL**
CREATING A CENTRAL INTELLIGENCE AREA

CHALLENGE

This client in the fashion and retail sector needed to execute a strategic & organizational transformation with the aim of becoming a brand-oriented company.

APPROACH

To address this challenge, we supported the client in creating a central intelligence area that leveraged synergies with the two new brand-centered business units. This area would be a business partner to sustain the strategy, manage the new brand governance and centralize data management.

New capabilities and a data-driven culture were also established within the company to help shift the organizational mindset from industry to brand-led decisions. Finally, a new governance structure was designed with roles and structures and prioritized KPIs. Pilots were carried out to ensure a good fit while a data lake and data governance infrastructure were developed with third-party providers.

RESULTS

- **Clear alignment achieved** within C-Level and the entire organization on the role of the intelligence area within governance and the cultural transformation
- **New governance connected end-to-end value chain perspectives that started to drive decisions** – from consumer insights, brand action, commercial performance to industry and supply chain service and optimization
- Real value generated from new governance piloted to **confirm hypothesis and derive KPIs / implement reports**
- Data lake platform and service providers set up to **meet business needs and long-term digital strategy**



SECTOR: FACILITY SERVICES

PLANNING FOR SUCCESSFUL EXECUTION

CHALLENGE

In order to perpetuate business contracts though increased client satisfaction and profitability, this B2B industry client sought to achieve commercial and operational excellence.

APPROACH

The business had a very specific operational challenge – measure commercial (hunting & farming) performance across a large national territory with many regional business units and operational teams in the field.

This demanded the creation of a control tower area, physically located at the headquarters with real-time monitoring of commercial team routines. Visual management provided leadership with real-time insights and call-to-action tools to avoid mistakes at the moment of truth along the client journey, along with identifying cross-sell and up-sell opportunities.

RESULTS

- A **control tower area was designed and implemented** with a new structure, new ways of working and a new governance model connected with the C-level, KPIs and call-to-action capabilities
- Regional leaders gained **enhanced visibility and control** over the operations provided by the control tower to better manage their operations and achieve financial targets
- A **digital application was developed** to manage commercial routines in the field with a new workflow that connected execution to tactical decisions while generating data for analysis and insights

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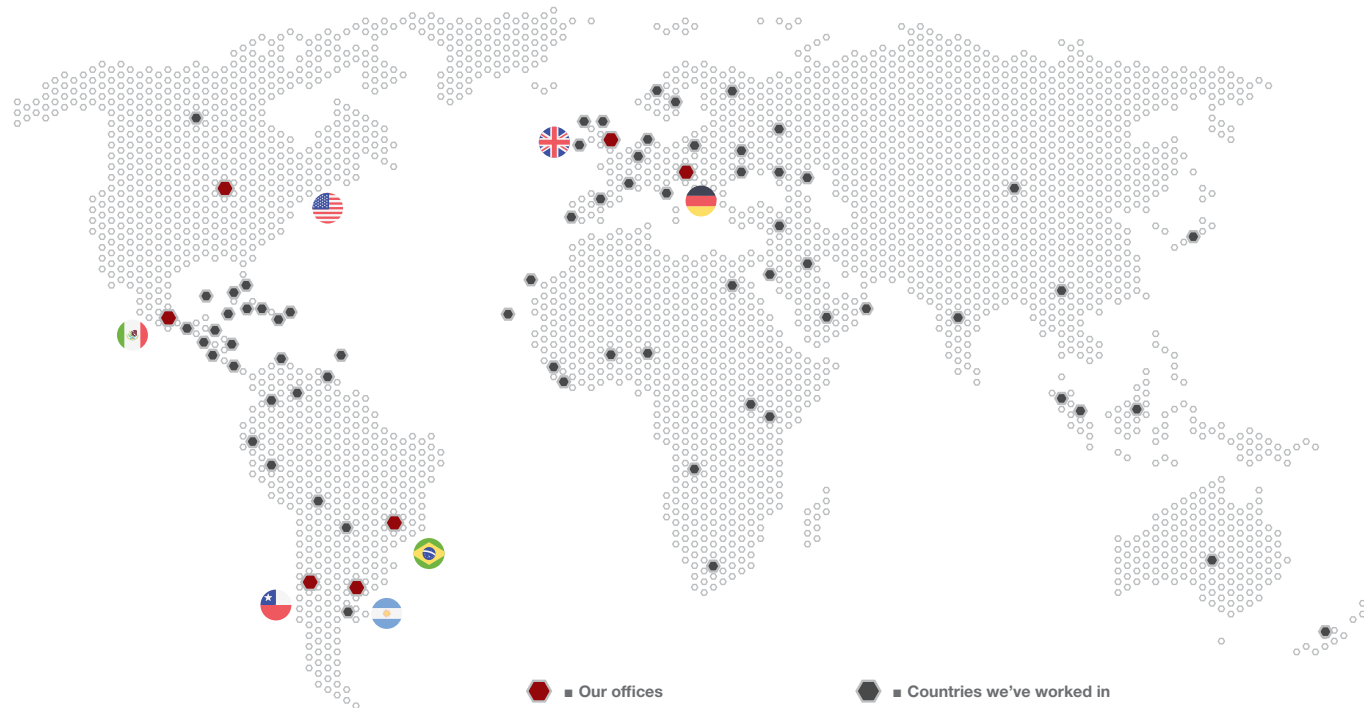


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