2024 Analytics Maturity Assessment Survey

The survey will remain open through **Friday, May 31, 2024**.

Please note: Once you begin the survey, you will not be able to return to it without losing your prior responses. A printable version of the survey is included in your invitation email for your convenience.

Why invest the time?

Estimated Time Commitment: 1 - 3 hours.

- **Actionable insights:** Gain a comprehensive understanding of your analytics strengths and weaknesses, enabling strategic decision-making.
- **Industry benchmarking:** Compare your maturity against peers, identifying areas for improvement and potential for mentoring.
- **Collective impact:** Your participation contributes to valuable industry research, shaping the future of analytics for everyone.
- **Sustainable progress:** Develop a roadmap for continuous improvement and track your organization's progress over time, measuring the effectiveness of your analytics initiatives.
- **Analytics evangelism:** Use survey results to advocate for increased data adoption and drive innovation in your organization.

Participation is key!

- The voice of each utility member is critical to understanding the collective strengths and opportunities for improvement in the use of analytics within the utility industry.

Not just a questionnaire!

- The Analytics Maturity Assessment (AMA) is a strategic tool for UAI utility members with many benefits to participation. The true value of this study lies in unified team responses from utility members.

Form a survey team!

- Gather knowledgeable representatives from each defined functional group for a holistic organizational response. This approach will provide a more accurate representation of your overall organizational analytics maturity.

Executive sponsorship!

- Engage executive level sponsorship to assist with cross-functional awareness and adoption of analytics maturity across your organization.

Section 1

Demographics

1.**Organization Name** (drop down)
Organizations are sorted alphabetically by parent company, then subsidiary. If you are answering for all companies within the parent company, please select the parent company; otherwise, select the individual organization that applies.

2.**First and Last Name:** Provide the name of the main contact person for this survey.
Fill in

3.**Title:** Provide the title of the main contact for this survey.
Fill in

4.**Email:** Provide the email address of the main contact for the survey.
Fill in

5.**Which functional groups will work together to complete this survey?** Select all that apply.

A description of each functional group is provided for the purpose of this survey. Use this description as you respond to each question referencing the functional groups.

We strongly recommend creating a Survey Team comprising a knowledgeable representative from each functional group.

Corporate: Provides various support functions across the organization, including human resources, safety, security, and communications. Manages corporate governance and oversees strategic planning and initiatives.

- ☐ **Customer Operations:** Manages the entire customer journey, from account opening and billing to service calls, complaints, and marketing. Ensures customer satisfaction and retention.
- ☐ **Finance:** Manages the financial health of the organization, including budgeting, forecasting, accounting, and risk management. Ensures financial stability and supports investment decisions.
- ☐ **Information Systems:** Designs, implements, and maintains the technology infrastructure to support all business operations, including application development, and cybersecurity. Also includes data management and analytics where not otherwise contained within a specific functional group.
- ☐ **Infrastructure:** Designs and monitors the physical infrastructure that produces and delivers the product, including pipelines, power lines, plants, and facilities.
- ☐ **Legal:** Provides legal advice and guidance on compliance with relevant regulations and laws. Represents the organization in legal matters and manages regulatory affairs.

- ☐ **Market Operations:** Manages the trading and optimization of commodities in wholesale markets. Ensures sufficient and efficient product procurement to ensure product availability and maximize revenues.
- ☐ **Supply Chain:** Procures materials, equipment, and services needed for operations. Manages contracts with vendors and ensures timely delivery at competitive prices.
- ☐ **Workforce Operations:** Oversees the physical delivery of the product. Responsible for field operations, maintenance, construction, and workforce management.

6.Survey Team: (Name, Title, Functional Group)Required to answer. Multi Line Text.
List the name and title of the person(s) from each functional group who participated in this survey team. This information is for your use or your company's use as you review the survey analysis and respond to future surveys. We recommend one name, title, functional group per line.
Fill in

7.Organization Type

- ☐ **Investor-Owned Utility:** A privately owned electric utility whose stock is publicly traded. It is rate regulated and authorized to achieve an allowed rate of return.
- ☐ **Publicly Owned Utility:** A utility operated by a municipality, state, federal, or other government agency.
- ☐ **Cooperative-Owned Utility:** A utility legally established to be owned by and operated for the benefit of those using its service.
- ☐ **Joint Action Agency:** A collaborative entity formed between public power providers for joint projects, resource planning, and cost savings.
- ☐ **Member-Owned Service Provider:** A public power partner providing advanced resources and technology systems to its members.
- ☐ **Independent System Operator (ISO/RTO):** An independent organization that oversees and manages the flow of high voltage electricity within a region.
- ☐ **Regulator:** An independent entity overseeing and managing the reliable operation of the electric grid within a region.
- ☐ **Other:** Details required when selected.

8.What service(s) does your organization provide to your customers/members? Select all that apply.

- ☐ **Electric Distribution:** Delivery of electricity from substations to end users at their buildings or facilities.
- ☐ **Electric Generation:** Production of electricity from various sources like power plants and renewable energy sources.
- ☐ **Electric Retail Provider:** Company that sells electricity directly to consumers under a competitive market structure.
- ☐ **Electric Transmission:** Long-distance transport of electricity between generation sources and distribution networks, usually at high voltage.
- ☐ **Gas:** Delivery and management of natural gas through pipelines to end users at their buildings or facilities.
- ☐ **Water:** Provision and treatment of potable water, including wastewater collection and treatment.
- ☐ **Broadband:** Delivery of high-speed internet access through various technologies like fiber optic, cable, or wireless connections.
- ☐ **Regulatory:** Activities related to compliance with industry regulations set by government agencies for safety, reliability, environmental impact, and customer protection.
- ☐ **System Balancing:** The continuous process of maintaining real-time equilibrium between electricity supply and demand to ensure grid reliability.
- ☐ **Shared Services:** Offers essential services to smaller utilities such as market operations, portfolio management, strategic advisory services, analytics, bulk purchasing solutions.
- ☐ **Other:** Details required when selected.

9.Customer/Member Count

- ◯ 0 - 99,999
- ◯ 100,000 - 499,999
- ◯ 500,000 - 999,999
- ◯ 1,000,000 - 1,999,999
- ◯ 2,000,000 +

10.Which geographic region does your organization *primarily* **serve? (drop down)**

(Note: The regional questions are hidden based on which responses are selected starting at question 10.)

11.**Which country in North America does your organization** *primarily* **serve? (drop down)**

12.Which states within the United States does your organization serve? Select all that apply.

13.Which Canadian provinces/territories does your organization serve? Select all that apply.

14.Does your organization also provide service in the United States?

- ◯ Yes
- ◯ No

15.Which countries in Africa does your organization serve? Select all that apply.

16.Which country in Asia does your organization serve? Select all that apply.

17.Which countries in the Caribbean does your organization serve? Select all that apply.

18.Which countries in Central America does your organization serve? Select all that apply.

19.Which countries in Europe does your organization serve? Select all that apply.

20.Which countries in Oceania does your organization serve? Select all that apply.

21.Which countries in South America does your organization serve? Select all that apply.

Section 2

Leadership | Strategy

This section will evaluate the degree to which the utility has defined, developed, and implemented an enterprise analytics strategy. It will also consider the effectiveness of the analytics strategy based on components such as alignment to overall corporate strategy, definition of long-term goals, and drivers for establishing enterprise analytics.

22.To what degree does your utility treat, manage, and value data as a strategic corporate asset?

- ◯ **Little to none:** Data is not considered an asset, with minimal or no dedicated resources for its management or analysis.
- ◯ **Limited:** Data is used in specific areas or projects, but not consistently across the organization.
- ◯ **Expanding approach:** Actively building data capabilities and awareness, but not fully mature.
- ◯ **Formalized practice:** Data embedded in strategic planning, governance, and decision-making.

23.What are the top three drivers of your analytics initiatives? Please select 3 options.

- ☐ **Corporate strategy:** Aligning analytics with long-term goals and objectives.
- ☐ **Environmental considerations:** Reducing the impact of or increasing opportunities from our ever-changing environment.
- ☐ **Expanding data landscape:** Utilizing the wealth of information at our fingertips to make data-informed decisions.
- ☐ **Increase revenue streams:** Optimizing existing products/services and identifying opportunities to launch new products/services to improve profitability and customer satisfaction.
- ☐ **Internal cost efficiency:** Streamlining processes and reducing operational costs.
- ☐ **Demographic changes:** Identifying the evolving customer wants and needs to continuously improve customer experience.
- ☐ **Regulatory requirements:** Meeting compliance standards and industry regulations.
- ☐ **Risk management:** Proactively identifying and mitigating potential threats.
- ☐ **Other:** Details required when selected.

24.How do you approach establishing long-term analytics direction and goals?

- ◯ **Reactive Focus:** We primarily prioritize immediate operational needs, with analytics primarily supporting existing processes.
- ◯ **Adaptive Roadmap:** We set high-level goals and adjust our analytics approach based on emerging trends and opportunities, revisiting periodically.
- ◯ **Formalized Plan:** We have a documented, multi-year plan, revisited periodically, outlining specific analytics objectives and initiatives aligned with future business needs.

25.How many years into the future does your analytics roadmap extend?

- ◯ 1
- ◯ 2-5
- ◯ 5-10
- ◯ 10+

26.Describe the scope of your organization's analytics strategy.

- ◯ **None:** No formal data and analytics strategy has been defined or documented. Decisions related to data use are ad hoc.
- ◯ **Limited:** A data and analytics strategy exists but does not apply to the organization as a whole.
- ◯ **Enterprise:** A well-defined data and analytics strategy guides data utilization across all functions of the organization.

27.To what degree is your analytics strategy aligned with the overall vision and mission of the organization?

- ◯ **Nonexistent:** Vision and mission are not considered in analytics planning or execution.
- ◯ **Inconsistent:** Analytics contributes to certain goals, but not consistently or comprehensively.
- ◯ **Substantial:** Vision and mission are core drivers of analytics initiatives and decision-making.

Section 3

Leadership | People | Organizational Model

This section will evaluate the development and success of the organizational model that supports enterprise analytics.

28.Which leadership level(s) are driving the analytics initiative at your organization? Select all that apply.

- ☐ **Board:** Highest governing body sets strategic direction.
- ☐ **Executives:** Top-level managers (CEO, CFO, etc.) responsible for overall operations.
- ☐ **Senior leadership:** Department heads or directors driving specific initiatives within the organization.
- ☐ **Subject matter experts:** Analysts or specialists embedded within specific departments who utilize data for departmental tasks.
- ☐ **Dedicated analytics team:** Centralized team with expertise in data analysis, not tied to any specific department.

29.Describe your ANALYTICS organizational model.

- ◯ **Nonexistent:** No dedicated analytics organization, and future development is not a current priority.
- ◯ **Developing:** An analytics organization is actively being planned or implemented.
- ◯ **Mature:** A fully operational analytics organization.

30.Your current or proposed **ANALYTICS organizational model** is best defined as:

- ◯ **Centralized:** Single decision-making body manages and executes all analytics across the organization.
- ◯ **Decentralized:** Independent analytics teams in each business unit with no shared structure or collaboration.
- ◯ **Federated**: Decentralized teams operate with common standards, platforms, or governance, enabling collaboration.
- ◯ **Hybrid:** Combination of centralized and decentralized elements, balancing control with local expertise.

31.How does your organization currently determine analytics project roles and responsibilities?

- ◯ **No formal process:** No designated method for assigning roles and responsibilities in analytics projects.
- ◯ **Department level:** Individual departments solely define and assign roles and responsibilities for their own analytics projects. Little to no cross-departmental coordination.
- ◯ **Enterprise level:** Defined roles and responsibilities for analytics projects are established at the organizational level, applying to all departments. Centralized coordination and governance exist.
- ◯ **Hybrid:** Combination of department and enterprise-level approaches, with some flexibility within set guidelines.

32.Describe your organization's primary approach to innovation.

- ◯ **External:** Vendor partnerships are relied upon to identify areas of opportunity or outside-of-the-box problem solving.
- ◯ **Informal:** Innovation is encouraged; no formal team has been established.
- ◯ **Specialized:** Dedicated teams are set up as needed for a specific purpose or specific functional groups.
- ◯ **Enterprise:** An enterprise level team has been established for the sole purpose of exploring innovative solutions and opportunities.

Section 4

Leadership | People | Analytics Resources

This section will evaluate the quantity and capability of staff supporting analytics. In addition, it will consider the ability of the utility to provide adequate resources and training to staff.

33.How does your organization acquire new analytics talent? Select all that apply.

- ◯ **Internal Acquisition:** Develop analytics skills through training, promotion, and internal recruitment.
- ◯ **External Recruitment:** Focus on hiring experienced analytics professionals from the external job market.
- ◯ **Vendor Support:** Primarily rely on external consultants or vendors for specific analytics projects or ongoing needs.
- ◯ **Educational Partnerships:** Collaborate with universities or colleges for talent sourcing, internships, or joint research initiatives.

34.How would you characterize the overall skill level of the analytics team working within your organization?

- ◯ **Foundational:** Basic knowledge and skills, aware of learning needs as the field evolves.
- ◯ **Developing:** Competent in core tasks, actively filling knowledge gaps and adapting to new trends.
- ◯ **Proficient:** Strong understanding of analytics, effectively handling most tasks while recognizing the need for continuous learning.
- ◯ **Advanced:** Highly skilled in various areas, proactively seeking new knowledge to stay ahead of the curve.
- ◯ **Leading edge:** Expert knowledge and experience, actively shaping the field through innovation and research.

35.Describe your organization's staffing capacity for various job roles as defined for this survey.

- **Limited Capacity:** Struggling to meet current workload demands.
- **Full Capacity:** Operating at maximum capacity to meet current demands.
- **Excess Capacity:** Meeting current workload demands with plenty of room for growth.

	Limited	Full	Excess
Business Analyst: **Interprets business needs into technical requirements.**	◯	◯	◯
Data Analyst: **Gathers, analyzes, and reports on data findings.**	◯	◯	◯
Data Architect: **Determines the efficient layout and flow of data within the organization.**	◯	◯	◯
Data Engineer: **Designs, deploys, and maintains data integrations.**	◯	◯	◯
Data Scientist: **Applies advanced analytics for predictive and prescriptive insights.**	◯	◯	◯
Systems Administrator: **Ensures stable infrastructure for hardware and software.**	◯	◯	◯

36.Have analytics-specific job roles and responsibilities been defined at your organization?

- ◯ **Undefined:** No formal analytics roles or plans to create them.
- ◯ **In Development:** Initial role outlines exist, but details and responsibilities still evolving.
- ◯ **Partially Defined:** Some specific analytics roles exist, but responsibilities lack full scope or consistency across the organization.
- ◯ **Enterprise-Wide Roles:** Well-defined analytics roles established and standardized across the entire organization.

37.How does your organization actively invest in building and strengthening the skills of its analytics professionals?

- ◯ **No Investment:** No formal skill development programs or plans.
- ◯ **Building Strategy:** Initial framework for skills development underway.
- ◯ **Structured Growth:** Established programs and resources for continuous learning.

Section 5

Leadership | People | Data Driven

This section will evaluate the value of data and analytics perceived by employees across the enterprise. It will also consider the ways in which data is used currently and in the future.

38.Describe how executives in your organization leverage analytics to make strategic decisions.

- ◯ **Intuition Led:** Decisions primarily rely on experience, intuition, and industry knowledge, with limited use of analytics or data.
- ◯ **Data Informed:** Intuition guides decision-making, but historical data and expert insights are consulted for validation and deeper understanding.
- ◯ **Data Enabled:** Data analysis plays a key role in identifying options and informing decisions, with intuition used for interpretation and final choice.
- ◯ **Data Guided:** Decisions are heavily influenced by advanced analytics and insights, even if they challenge initial instincts.
- ◯ **Data Driven:** Strategic decisions are primarily based on robust data analysis and advanced analytics, with experience and intuition used to refine or adapt those recommendations.

39.Select all the ways your organization currently uses data and analytics. Select all that apply.

- ☐ **Summarize data:** Generate basic reports and visualizations to understand current state.
- ☐ **Establish and inform KPIs:** Define key metrics and use data to track progress.
- ☐ **Analyze historical trends:** Identify patterns and insights from past data.
- ☐ **Develop predictive models:** Forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Develop prescriptive models:** Generate recommendations and actions to optimize processes and decisions.
- ☐ **Explore emerging technologies:** Go beyond established tools and techniques to discover innovative ways to solve problems and seize opportunities.

Section 6

Leadership | Analytics Governance

Analytics Governance is the continuous management of analytics processes, policies, and information to enhance business outcomes. This involves strategies, processes, policies, activities, skills, institutional knowledge, organizational information, models, and technologies.

This section will evaluate the capability of the organization to create and manage analytics processes, policies, and information.

40.Describe the scope of your organization's ANALYTICS GOVERNANCE program.

◯ **Nonexistent:** No analytics governance in place, and future development is not a current priority.
◯ **Limited:** Analytics governance exists but is not complete or does not apply to the organization as a whole.
◯ **Enterprise:** An analytics governance program is in place across the organization.

41.Your current or proposed ANALYTICS GOVERNANCE model is best defined as:

◯ **Centralized:** Single decision-making body manages and monitors analytics governance across the organization.
◯ **Decentralized:** Independent analytics teams in each business unit with no shared structure or collaboration.
◯ **Federated:** Decentralized teams operate with common standards, platforms, or governance, enabling collaboration.
◯ **Hybrid:** Combination of centralized and decentralized elements, balancing control with local expertise.

42.Which of the following areas does your organization's ANALYTICS GOVERNANCE program currently address? Select all that apply.

☐ **Business value:** Investments in analytics generate business value.
☐ **Product integrity:** Accountability, transparency, and traceability of analytics products.
☐ **Model reliability:** Accuracy and performance of analytics models.
☐ **Security:** Secure and compliant management of data, derived data, and analytics products.
☐ **Resources:** Availability of adequate analytics resources.
☐ **Data availability:** Availability of data to analysts and developers.
☐ **Feature store:** Developer access to model features for development of new models.
☐ **Deployment:** Standardized process to deploy analytics products into production.

Section 7

Technical Competencies | Data Governance

Data governance is defined as the overall management of the availability, usability, integrity, and security of data used in an enterprise, and includes metadata management.

This section will evaluate the overall management of the availability, usability, integrity, and security of data used in the organization, including metadata management.

43.Describe the state of your organization's formal **DATA GOVERNANCE program**. Note: The formal data governance program must manage at least one of the following data aspects: availability, usability, integrity, security.

◯ **Nonexistent:** No formal data governance program, and future development is not a current priority.
◯ **Developing:** A formal data governance program is actively being planned or implemented.
◯ **Mature:** A formal data governance program is in place.

44.Your current or proposed **DATA GOVERNANCE** model is best defined as:

◯ **Centralized:** Single decision-making body manages and monitors data governance across the organization.
◯ **Decentralized:** Independent analytics teams in each business unit with no shared structure or collaboration.
◯ **Federated:** Decentralized teams operate with common standards, platforms, or governance, enabling collaboration.
◯ **Hybrid:** Combination of centralized and decentralized elements, balancing control with local expertise.

45.What percentage of your data sources, data management tools, and analytics tools have been inventoried?

◯ 0%
◯ 1-25%
◯ 26-50%
◯ 50-75%
◯ 75-100%

46.Describe the scope of your organization's data dictionary.

◯ **Nonexistent:** No data dictionary in place, and future development is not a current priority.
◯ **Limited:** A data dictionary exists but does not apply to the organization as a whole.
◯ **Enterprise:** A data dictionary is in place for data across the organization.

47.Describe the state of your organization's formal process to maintain and update the data dictionary.

◯ **Nonexistent:** No formal process in place, and future development is not a current priority.
◯ **Developing:** A formal process to maintain and update the data dictionary is in progress.
◯ **Mature:** A formal process to maintain and update the data dictionary is fully operational.

48.To what degree has your organization adopted data management standards?

◯ **Nonexistent:** No data management standards in place, and future development is not a current priority.
◯ **Developing:** Adoption of data management standards is planned or in progress.
◯ **Mature:** Data management standards have been adopted.

49.Describe your organization's ability to trace the data used in analytics products back to the original source?

◯ **Little to none:** No formal mechanism or attempt at data traceability.
◯ **Limited:** Partial traceability for some analytics products; gaps require manual effort.
◯ **General:** Established system for basic data lineage but lacks granularity or automation.
◯ **Fully traceable:** Automated and comprehensive data lineage mapping for all analytics products.

50.Indicate your organization's progress toward enterprise level implementation of the data management components as defined by Data Management Association (DAMA).

Data Management Body of Knowledge (DMBoK) 2nd Edition. (dama.org/cpages/body-of-knowledge).

- **None:** No future plans identified.
- **In Progress:** Deployment planned and/or in progress.
- **In Place:** Deployed across the organization.

	None	In Progress	In Place
Data Governance: The exercise of authority, control, and shared decision-making (planning, monitoring, and enforcement) over the management of data assets.	◯	◯	◯
Data Architecture: Identifying the data needs of the enterprise (regardless of structure) and designing and maintaining the master blueprints to guide data integration, control data assets, and align data investments with business strategy.	◯	◯	◯
Data Modeling and Design: The process of discovering, analyzing, and scoping data requirements, and then representing and communicating these data requirements in a precise form called the data model. This process is iterative and may include a conceptual, logical, and physical model.	◯	◯	◯
Data Storage and Operations: The design, implementation, and support of stored data to maximize its value.	◯	◯	◯
Data Security: Definition, planning, development, and execution of security policies and procedures to provide proper authentication, authorization, access, and auditing of data and information assets.	◯	◯	◯
Data Integration and Interoperability: Managing the movement and consolidation of data within and between applications and organizations.	◯	◯	◯
Document and Content Management: Planning, implementation, and control activities for lifecycle management of data and information found in any form or medium.	◯	◯	◯
Reference and Master Data: Managing shared data to meet organizational goals, reduce risks associated with data redundancy, ensure higher quality, and reduce the costs of data integration.	◯	◯	◯
Data Warehousing and Business Intelligence: Planning, implementation, and control processes to provide decision support data and support knowledge workers engaged in reporting, query, and analysis.	◯	◯	◯
Metadata Management: Planning, implementation, and control activities to enable access to high quality, integrated metadata.	◯	◯	◯
Data Quality: The planning, implementation, and control activities that apply quality management techniques to data in order to assure it is fit for consumption and meets the needs of data consumers.	◯	◯	◯

Section 8

Leadership | Business Process Integration

This section will evaluate the degree to which data and analytics drive business processes and inform business KPIs.

51.To what degree do data and analytics inform the development and measurement of relevant business process key performance indicators (KPIs) for each functional group?

Not at all:
- KPIs are defined and tracked manually, with limited or no data or analytics input; business processes operate independently of data-driven insights.

Somewhat:
- Some KPIs incorporate basic data analysis, but insights are not consistently used for development or measurement; data might inform some process improvements, but not systematically or comprehensively.

Greatly:
- Data and analytics play a significant role in defining, measuring, and refining key performance indicators; data-driven insights regularly guide process optimization and decision-making for KPIs, and automated systems may leverage data to track and adjust KPIs in real time.

Completely:
- Data and analytics are fully integrated into the development and measurement of all relevant business process; KPIs are optimized based on real-time data analysis and feedback loops; advanced analytics and automation drive process efficiency and performance improvement.

Not Applicable:
- The organization does not include a functional group matching the description provided for the purpose of this survey.

	Not at all	Somewhat	Greatly	Completely	Not Applicable
Corporate	◯	◯	◯	◯	◯
Customer Operations	◯	◯	◯	◯	◯
Finance	◯	◯	◯	◯	◯
Information Systems	◯	◯	◯	◯	◯
Infrastructure	◯	◯	◯	◯	◯
Legal	◯	◯	◯	◯	◯
Market Operations	◯	◯	◯	◯	◯
Supply Chain	◯	◯	◯	◯	◯
Workforce Operations	◯	◯	◯	◯	◯

52.Describe the access to data and analytics tools by business users and process owners.

- ◯ **Limited and inconsistent:** Access varies across groups, often lacking self-service tools and facing data silos.
- ◯ **Adequate with challenges:** Basic tools available, but access control, training, or data limitations hinder full utilization.
- ◯ **Broad and consistent:** Standardized tools and data access across groups, enabling self-service analysis and informed decision-making.

Section 9

Technical Competencies | Analytics Capabilities

This section will evaluate the organization's current analytics capabilities across functional groups and as a whole.

53.Which of the following analytics capabilities does your organization currently utilize for the Corporate functional group?

Corporate: Provides various support functions across the organization, including human resources, safety, security, and communications. Manages corporate governance and oversees strategic planning and initiatives. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

54.Which of the following analytics capabilities does your organization currently utilize for the Customer Operations functional group?

Customer Operations: Manages the entire customer journey, from account opening and billing to service calls, complaints, and marketing. Ensures customer satisfaction and retention. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

55.Which of the following analytics capabilities does your organization currently utilize for the Finance functional group?

Finance: Manages the financial health of the organization, including budgeting, forecasting, accounting, and risk management. Ensures financial stability and supports investment decisions. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

56.Which of the following analytics capabilities does your organization currently utilize for the Information Systems functional group?

Information Systems: Designs, implements, and maintains the technology infrastructure to support all business operations, including application development, and cybersecurity. Also includes data management and analytics where not otherwise contained within a specific functional group. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

57.Which of the following analytics capabilities does your organization currently utilize for the Infrastructure functional group?

Infrastructure: Designs and monitors the physical infrastructure that produces and delivers the product, including pipelines, power lines, plants, and facilities. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

58.Which of the following analytics capabilities does your organization currently utilize for the Legal functional group?

Legal: Provides legal advice and guidance on compliance with relevant regulations and laws. Represents the organization in legal matters and manages regulatory affairs. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

59.Which of the following analytics capabilities does your organization currently utilize for the Market Operations functional group?

Market Operations: Manages the trading and optimization of commodities in wholesale markets. Ensures sufficient and efficient product procurement to ensure product availability and maximize revenues. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

60.Which of the following analytics capabilities does your organization currently utilize for the Supply Chain functional group?

Supply Chain: Procures materials, equipment, and services needed for operations. Manages contracts with vendors and ensures timely delivery at competitive prices. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable:** The organization does not include this functional group.

61.Which of the following analytics capabilities does your organization currently utilize for the Workforce Operations functional group?

Workforce Operations: Oversees the physical delivery of the product. Responsible for field operations, maintenance, construction, and workforce management. Select all that apply.

- ☐ **Reporting:** Arranging historical data together in a basic report with no insights highlighted.
- ☐ **Business Intelligence:** Creating dynamic dashboards that intuitively identify when and where something happened.
- ☐ **Analysis:** Statistical analysis of historical data to identify patterns and trends.
- ☐ **Forecasting:** Using predictive analytics tools and techniques to forecast future outcomes based on historical data and trends to influence decision-making.
- ☐ **Optimizing:** Using prescriptive analytics tools and techniques to evaluate predicted future alternatives and recommend optimal actions.
- ☐ **Automation:** Automated decision-making using analytic insights with continuous monitoring and human oversight.
- ☐ **Not Applicable**: The organization does not include this functional group.

62.Indicate which fields of artificial intelligence (AI) your organization currently has in production. These fields may include multiple subsets that are not expressly identified; may be utilized to increase the effectiveness of other AI fields; and/or may be derived from a combination of fields within AI. Select all that apply.

- ☐ **Machine Learning (ML):** Employs algorithms to learn patterns from data. Examples include predictive modeling, recommendation systems, and image recognition.
- ☐ **Natural Language Processing (NLP):** Enables machines to understand, interpret, and respond to human language. Examples include chatbots, language translation, and sentiment analysis.
- ☐ **Large Language Models (LLM):** Enables machines to understand, interpret, and respond to human language. Examples include knowledge based chatbots, language translation, and summarization.
- ☐ **Computer Vision:** Utilizes algorithms to enable machines to interpret and make decisions based on visual data. Examples include facial recognition, object detection, and image segmentation.
- ☐ **Robotics:** Blends mechanical engineering and computer science to create systems capable of performing tasks autonomously or semi-autonomously.
- ☐ **Generative AI:** Utilizes multiple fields of AI to create new content, such as images, text, or audio, by learning patterns and structures from existing data.
- ☐ **Intelligent Search:** Applies multiple AI fields to comprehend user queries, retrieve relevant information, and personalize results based on user behavior to enhance the accuracy and relevance of search results.
- ☐ **Personalized Recommendations:** Combines ML and NLP to proactively make personalized suggestions based on user preferences, behaviors, and interactions.
- ☐ **Vendor Applications Only:** AI has only been utilized or explored through out-of-the box vendor solutions that have incorporated AI into their solution.
- ☐ **Other:** Details required when selected.

63.What other emerging technologies is your organization exploring?

Fill in

Section 10

Technical Competencies | Technology & Tools

This section will evaluate the organization's performance in establishing an enterprise analytics architecture, procure the appropriate tools and technologies, and management of analytics technology adoption across the functional groups.

64.Does your organization have an enterprise analytics architecture currently in place?

- ◯ **Nonexistent:** No enterprise analytics architecture in place, and future development is not a current priority.
- ◯ **Developing:** An enterprise analytics architecture is planned or in progress.
- ◯ **Mature:** An enterprise analytics architecture is in place and fully functional, expanding as needed.

65.To what extent is your organization integrating information from various sources across the organization?

- ◯ **Siloed:** Data remains isolated within systems requiring manual extraction.
- ◯ **Basic Connectivity:** Integration exists between systems.
- ◯ **Focused Data Hub:** Strategic data selection with automated refresh for key use cases.
- ◯ Enterprise Data Hub: Unified platform with seamless automated data flows for centralized insights.

66.To what extent does your organization leverage external data sources?

- ◯ **None:** No external data sources are currently used.
- ◯ **Limited:** Occasional manual integration of specific external data points.
- ◯ **Supplemental:** External data used for targeted analyses or specific projects.
- ◯ **Embedded:** External data is routinely integrated into core analytics pipelines.

67.What is the hosting environment for your organization's data storage and analytics toolset, including data management.

- ◯ **On-Premise:** Hosted exclusively on local servers.
- ◯ **Cloud:** Maintained exclusively in a cloud environment.
- ◯ **Hybrid Cloud:** Includes both on-premise and cloud solutions.

68.Describe your organization's current analytics technology and toolset.

- ◯ **Limited:** Primarily manual processes and basic reporting tools.
- ◯ **Functional:** Stand-alone data management and visualization tools for basic analytics.
- ◯ **Integrated:** Unified analytics platform enabling data integration and diverse analysis.
- ◯ **Advanced:** Comprehensive architecture with automated workflows, AI/ML integration, and real-time data processing.

69.How does your utility assess the need for updates or changes to your analytics toolset?

- ◯ **Limited Focus:** Investment in modernizing our analytics toolset is not a current priority, and we have no plans for a comprehensive evaluation in the near future.
- ◯ **Reactive Response:** We primarily evaluate our toolset when issues arise such as limitations in capabilities, performance issues, security concerns, or compliance requirements.
- ◯ **Proactive Planning:** We evaluate our analytics toolset at least annually to ensure our ability to meet the organization's strategic goals.
- ◯ **Opportunistic:** We continuously monitor new technologies and emerging trends in analytics tools and proactively assess their potential to enhance our capabilities and deliver value to the organization.

70.Which processes does your organization utilize to evaluate and select analytics technologies and toolsets? Select all that apply.

- ☐ **Basic Evaluation:** We have a basic process that involves evaluating a few options, but decisions are primarily based on immediate needs rather than long-term strategy.
- ☐ **Structured Evaluation:** We have a structured process for evaluating and selecting analytics technologies. We consider a defined set of criteria, but the process may not be consistently followed.
- ☐ **Project Teams:** We involve multiple stakeholders in the evaluation process to ensure alignment with various business units and user needs.
- ☐ **Vendor Partnerships:** Our technology selection process includes collaboration with strategic vendor partners.
- ☐ **Innovation-Centric:** We actively seek and evaluate emerging technologies and innovative solutions to stay ahead of the curve in analytics capabilities.

Section 11

Insights and Impact

This section will evaluate the organization's performance in establishing an enterprise analytics architecture, procure the appropriate tools and technologies, and management of analytics technology adoption across the functional groups.

71.How will your organization utilize this survey and resulting analysis? Select all that apply.

- ☐ **Assess:** Identify strengths and weaknesses in our current analytics capabilities.
- ☐ **Gauge:** Benchmark our analytics maturity against industry peers.
- ☐ **Prioritize:** Develop a roadmap for improving our analytics capabilities over time.
- ☐ **Measure:** Track progress toward achieving a more mature analytics environment.
- ☐ **Evangelize:** Utilize the survey results to educate and advocate for increased adoption of data-driven approaches within the organization.
- ☐ **Engage:** Bring departmental leaders together to discuss organizational goals, identify overlapping opportunities, and envision how data assets and analytical resources will help them to meet those goals together.
- ☐ **Innovate:** Use the survey findings to justify investment in new analytics tools and technologies.
- ☐ **Collaborate:** Contribute to industry research on analytics maturity in the utilities sector.
- ☐ **Other:** Details required when selected.

72. Please provide suggestions for improvements to this survey and the insights derived from it. We would also love to hear about your experience completing the survey as a team.

Fill in

73.**Congratulations. You did it! Thank you for taking the time to complete the UAI Analytics Maturity Assessment Survey!**

Your participation is crucial in our cooperative efforts to increase your organization's journey up the analytics maturity curve at an achievable pace. As mentioned, the true value of this study lies in unified team responses. By forming a team that represents different functional areas, you gained a richer and more accurate picture of your organization's analytics maturity.

We encourage you to share your experience with colleagues and participate in future AMA surveys.

Together, we can shape the future of analytics and drive innovation in the utility sector.

Questions or comments?

We'd love to hear from you. Contact Sandi Joralemon at sjoralemon@utilityanalytics.com.

Please answer one final question to help us prepare for future surveys.

How likely are you to participate in future Analytics Maturity Assessment Surveys?

(Rate on a scale of 1 to 10 with 1 being Not at all likely and 10 being Extremely likely.)