

# OPTIMIZE YOUR ORGANISATION

## A Guide to Data Automation

Start streamlining data processes, reducing human error and save time and cost when you work with The Experts behind Data Automation.



# AN INTRODUCTION TO DATA AUTOMATION

Data Automation is the process of collecting, processing and presenting data using automated tools instead of performing these tasks manually.

Manually updated data presents a risk of being delayed and creates an additional workload for individuals to complete alongside their day-to-day responsibilities.

Data Automation eliminates the reliance on manual labour with bots that do the job for you.

With almost no human intervention, this process will collect, transform, store, and analyse data using well-designed methods, software, and artificial intelligence.

## THE KEY ELEMENTS

These tools automate three key elements, and this is known as ETL or ELT, depending on what tool you are using:



### Extract

Data is exported from source systems like CRMs, Emails, Web Pages, and SQL servers into a staging area.

This data could consist of various types and be pulled from most structured or unstructured sources.



### Transform

Change the data to fit the purpose.

For example, transform data into a star schema ready for further analysis by visualisation or BI tool.



### Load

The data is moved from the staging area into storage.

For example: a Data Warehouse or a Data Lake.

## THE BENEFITS OF DATA AUTOMATION:

### Enables Better Decision-Making

Businesses can react rapidly, allowing for decisions to be made quickly and with more data-led insight.

### Reduces Risk of Human Error

Manual data entry is prone to human errors that can cause data quality issues and affect reporting accuracy.

### Improved Operation Efficiency

Setting up the rules & processes with competing software, you can easily audit & refine these processes. You can quickly identify any broken & unnecessary workflows.

### More Efficient Workforce

Teams no longer need to spend their precious time on mundane admin instead adding value elsewhere as their skillsets are appropriately optimised.

### Reduces Operational Costs

You can get substantially more done with the same resource: minimal investment whilst maximising return.

### Scalability

Automation software is ready to scale with your business, so you can utilise its benefits regardless of where your business is now and how much it grows in the future.

# 3 STEPS FOR ENABLING DATA-DRIVEN DECISIONS

## 1. PRODUCE QUALITY CODE:

Successful teams find ways to build quality using code standards and development methodologies. They experience fewer errors and increased development speed and collaboration. Automated testing for ETL/ELT pipelines, data quality checks and CI/CD processes will check for errors and inconsistencies within code and data, building stable services and confidence in end users.

Developing data products/pipelines and accurately

fixing bugs!

Standardised code is generated using pre-defined templates and guidelines. You can ensure that all the code produced is consistent and follows established conventions. Code is now easier to maintain and the codebase easier to understand giving you the confidence that your team are producing reliable data products.

## 2. COLLABORATIVE DOCUMENTATION:

Business teams exploring or consuming data need up-to-date and easy-to-understand documentation, helping them use the data in context confidently.

Stop manually generating and updating documentation; it's time-consuming and prone to inconsistencies and human error. Create meaningful documentation for targeted audiences and structure

the contents of data sets by keeping documentation up to date.

Teams need to collaborate, track the lineage of data showing how it's been transformed and generate data dictionaries, including the definition, format, and values of data elements.

## 3. ADAPT & SCALE:

As a company increases the amount of data, it creates and uses, its infrastructure and processes must be built with scalability and adaptability, enabling it to respond to new opportunities.

Data used in decision-making will evolve with the business objectives. Using the correct approach (development lifecycle) to developing data solutions will minimise the time and cost required to deliver answers.

Scalable technology that is performant, reliable & easy to support will reduce running costs while increasing the frequency & number of people consuming the data.

Building technologies that can port across services and platforms or just be able to move from on-premise to cloud (or operate a hybrid) will prepare the organisation to handle future requirements.

Applying these steps takes a lot of effort, but it will enable reliable, stable & well-documented data to drive decision-making.

Build a gold-standard data delivery system underpinned by automation software, reducing time to production while being cost-effective at scale.

Be known for creating the essential tool for your company and colleagues use to manage & analyse data!

"I've been involved with teams in the past that have been so preoccupied with fixing software or organising processes to be able to do their job, and the project or product suffers or is not the expected quality.

I believe Data Modellers, Engineers or Scientists should spend all their time focusing on the tasks they are good at, and that Data Automation Software will enhance any team's output.

Spending a small amount of time upfront, you can avoid problems like these and set yourself and your team up for success."

- Carl Richards, Head of Consulting Services, Engaging Data





The Engaging Data team's success can be attributed to how our people use their time. Efficient use of time is the key!

Data Automation tools let our consultants spend more time thinking about the problem than debugging code.

Selecting the right tool can help you migrate into new data platforms as they evolve, reducing the cost of scaling the technology up or out.

We believe that Data Automation provides a rock-solid foundation for any company to build valuable and engaging data.

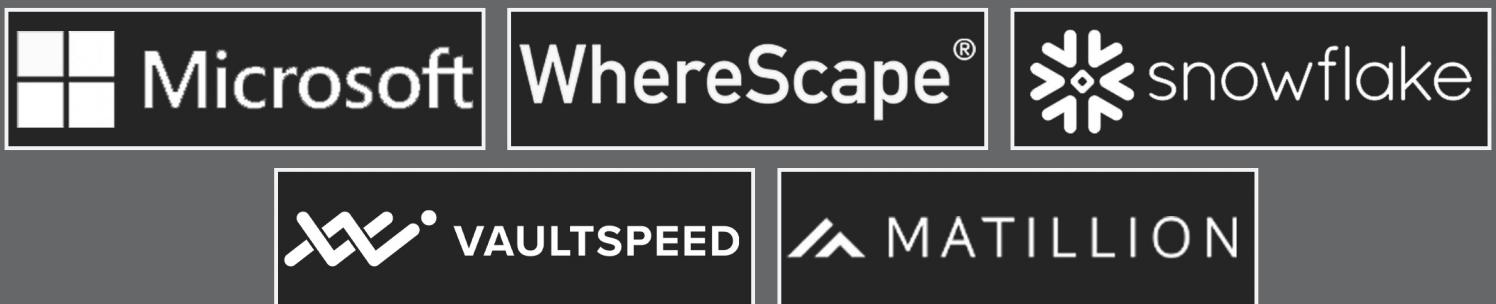
- Simon Meacher, Managing Director, Engaging Data



## OUR PARTNERS:

To be relevant to your needs, we only work with specifically selected Data and Information Management partners.

This approach helps you bring true value in realising and delivering your data-led business change journey.



## TRUSTED BY:



**LEARN MORE ABOUT HOW  
DATA AUTOMATION CAN HELP  
YOUR BUSINESS SURGE AHEAD  
OF THE COMPETITION,**

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