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DATA PERFORMANCE MATURITY

ASSESS AND IMPROVE DATA MATURITY IN COMPANIES

The Data Maturity Framework developed by KPI Management Solutions is a tool that helps organisations assess and improve their team's ability to use data effectively. It is not a training programme or a sales pitch; it is a structure for thinking clearly about what good looks like, where your people currently stand, and how to grow their maturity over time.

Our approach comes from working with thousands of learners across industries, roles and levels. From finance to operations, from graduates to executives, we have seen how clarity on data maturity drives confidence, action and results.
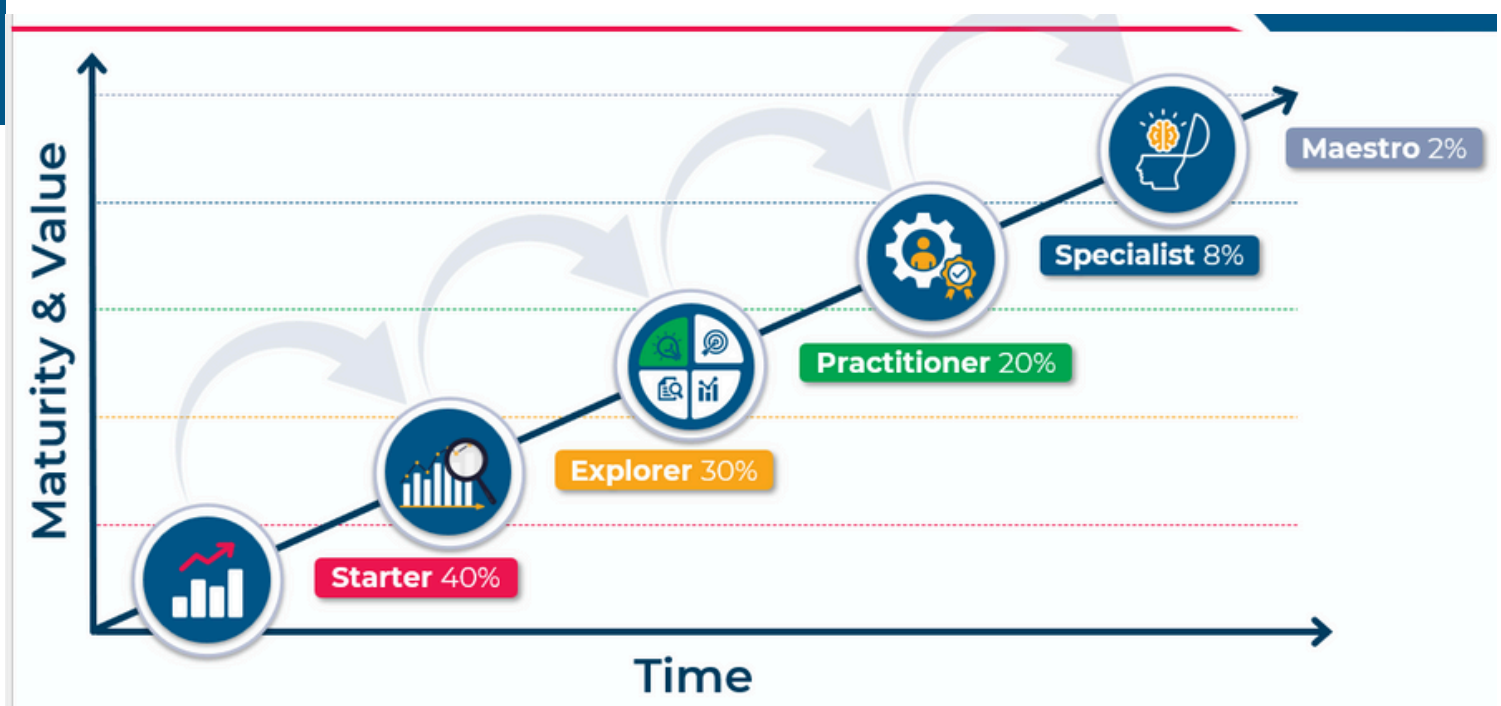
TABLE OF CONTENTS

WHY DATA MATURITY MATTERS

COACHING BUILT FOR REAL BUSINESS

In today's working world, every professional needs to be data literate. The ability to read, analyse, argue and act on data is no longer a specialist skill; it is part of everyday performance.

Yet most teams struggle to know where to begin. They either underestimate their gaps or overestimate their capabilities. This confusion leads to frustration, wasted tools, and missed opportunities.

The Data Maturity Framework provides clarity. It breaks down the complex world of data skills into five practical levels, each linked to real business value. It shows how individuals can grow, how teams can work better together, and how organisations can make better, faster decisions.
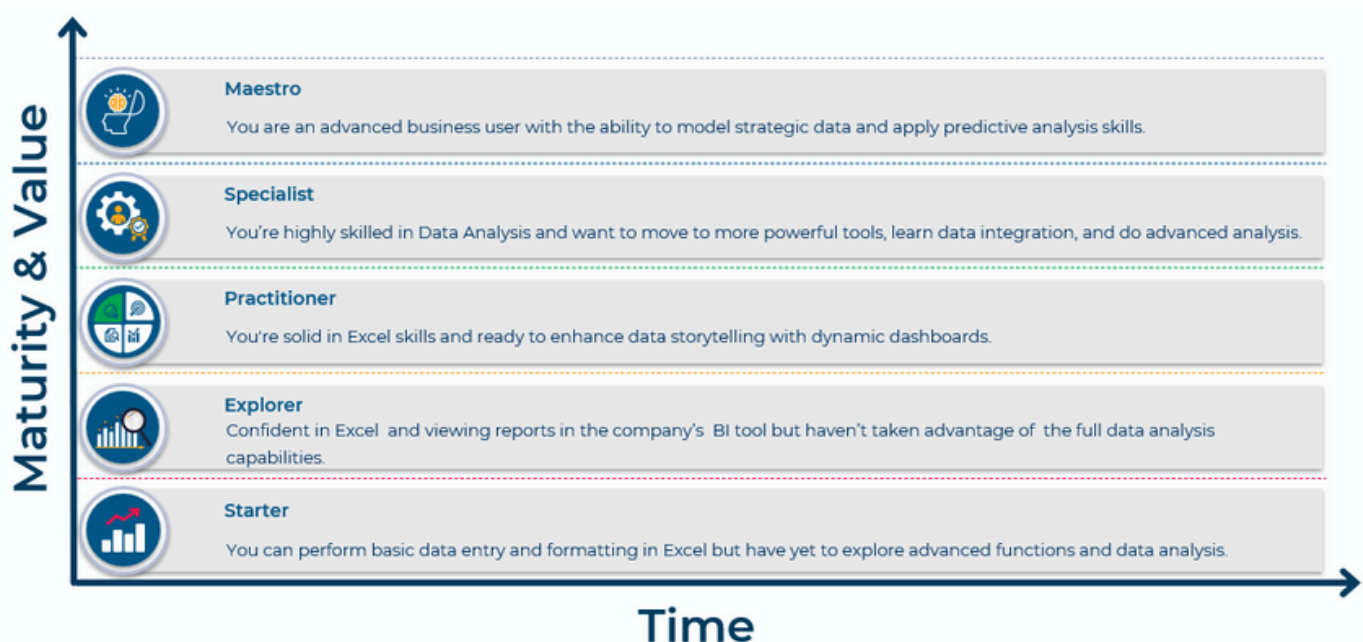
THE FIVE LEVELS

Each level in the framework is based on practical skill, not vague theory. It is grounded in real work using tools like Excel, Power BI, Qlik, and Smartsheet. It meets people where they are and shows them what good looks like.

- **Starter:** Basic spreadsheet skills. Can input and clean data. Uses simple formulas like SUM and AVERAGE. Not yet analysing.

- **Explorer:** Comfortable with Excel functions and chart types. Can explore reports and perform simple analysis. Beginning to use business tools.

- **Practitioner**: Creates dashboards. Uses advanced formulas. Starts to tell stories with data. Able to make decisions based on analysis.

- **Specialist**: Works across multiple systems. Uses Power BI and automation. Cleans and integrates data. Builds structured, repeatable reports.

- **Maestro**: Shapes business strategy using data. Builds predictive models. Understands business drivers. Influences executive decisions.

Everyone does not need to become a Maestro. What matters is that everyone moves up a level over time.

Maturity & Value

Maestro
You are an advanced business user with the ability to model strategic data and apply predictive analysis skills.

Specialist
You're highly skilled in Data Analysis and want to move to more powerful tools, learn data integration, and do advanced analysis.

Practitioner
You're solid in Excel skills and ready to enhance data storytelling with dynamic dashboards.

Explorer
Confident in Excel and viewing reports in the company's BI tool but haven't taken advantage of the full data analysis capabilities.

Starter
You can perform basic data entry and formatting in Excel but have yet to explore advanced functions and data analysis.

Time

STARTER

Current State

- You can open a spreadsheet and enter data.
- You can format cells, apply basic styling, and navigate Excel's interface.
- You can perform simple calculations like SUM, AVERAGE, MIN, and MAX.
- You can create basic tables and simple lists.
- You understand how to sort and filter data, but don't yet manipulate large datasets.

Next Step

- Enrol in a comprehensive Excel training course (20-30 hours) to learn essential functions and features.
- Build confidence in navigating Excel and using key formulas.
- Start exploring basic charts and structured data entry methods.

Learning Outcome

- You'll be able to use Excel confidently, structure spreadsheets properly, and apply essential formulas.
- You'll understand basic data formatting and analysis.
- You'll be ready to advance to more analytical Excel functions.

You can perform basic data entry and formatting in Excel but have yet to explore advanced functions and data analysis.

Current State	Next Step	Learning Outcome
• You can open a spreadsheet and enter data.	• Enrol in a **comprehensive Excel training course** (20-30 hours) to learn essential functions and features.	• You'll be able to **use Excel confidently**, structure spreadsheets properly, and apply essential formulas.
• You can format cells, apply basic styling, and navigate Excel's interface.	• Build confidence in **navigating Excel and using key formulas**.	• You'll **understand basic data formatting and analysis**.
• You can perform simple calculations like **SUM, AVERAGE, MIN, MAX**.	• Start exploring **basic charts** and structured data entry methods.	• You'll be ready to advance to **more analytical Excel functions**.
• You can create **basic tables and simple lists**.		
• You understand how to **sort and filter data** but don't yet manipulate large datasets.		

→ **LEVEL 2**

EXPLORER

Current State

- You can use key formulas like VLOOKUP, SUMIF, COUNTIF, AVERAGE, MIN, and MAX.
- You can create and format 4-7 different chart types.
- You can filter, sort, and structure data effectively. In the Company's BI tool, where someone else has set it up for you.
- You can perform simple data manipulations and cleaning.
- You are comfortable with navigating Excel's functions, but haven't used pivot tables or automation yet.

Next Step

- Learn 10 Tips to get Insights from Data.
- Understand when and how to use different chart types for storytelling.
- Master intermediate Excel formulas and functions.
- Get comfortable with PIVOT Tables.
- Learn to create structured, well-formatted reports and dashboards.
- Improve data organisation skills for more effective analysis.

Learning Outcome

- You'll be proficient in using intermediate formulas and data cleaning techniques.
- You'll be able to choose the right charts for effective data storytelling.
- You'll gain efficiency in working with structured datasets.

Confident in Excel and viewing reports in the company's BI tool but haven't taken advantage of the full data analysis capabilities.

Current State	Next Step	Learning Outcome
• You can use key formulas like **VLOOKUP, SUMIF, COUNTIF, AVERAGE, MIN, and MAX.**	• Learn **10 Tips** to get Insights from Data	• You'll be proficient in **using intermediate formulas and data cleaning techniques.**
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• You can perform simple **data manipulations and cleaning.**	• Get comfortable with **PIVOT Tables.**	
• You are comfortable with **navigating Excel's functions, but** haven't used pivot tables or automation yet.	• Learn to create **structured, well-formatted reports and Dashboards** .	
	• Improve **data organization skills** for more effective analysis.	

PRACTITIONER

Current State

- You can confidently use pivot tables for data summarisation.
- You can create and work with around 15 different chart types, including advanced options.
- You can use advanced Excel formulas such as INDEX-MATCH, XLOOKUP, and array formulas.
- You can clean and manipulate data using structured references and table formatting.
- You can build interactive dashboards in Excel using slicers, conditional formatting, and linked charts.
- You are starting to tell data-driven stories, but the insights could be clearer or more impactful.
- Apply the 10 Tips in your work

Next Step

- Strengthen storytelling skills by learning how to present data insights effectively.
- Improve data cleaning and structuring techniques to work with larger datasets efficiently.
- Master all available Excel chart types(i.e. 20 Chart types) and learn when to use each for maximum impact.
- Learn to create dynamic dashboards that allow navigating, filtering and drilling down - as and when the audience asks questions.

Learning Outcome

- You'll be able to analyse and visualise data effectively, creating dashboards that help drive business decisions.
- You'll gain confidence in cleaning and transforming raw data into meaningful reports.
- You'll understand how to tell better stories with data, making insights more actionable.

SPECIALIST

Current State

- You can build and analyse interactive Excel dashboards, but data integration is still a challenge.
- You can perform complex data manipulation in Excel, but you may struggle with large datasets.
- You have some exposure to Power BI, but are not using it to its full potential.
- You may be relying too much on manual processes, slowing down your workflow.

Next Step

- Move beyond Excel and start integrating Power BI for better data management and visualisation.
- Work with different granularities of data.
- Learn to use Power Query for automating data cleaning and transformation.
- Understand DAX formulas to create calculated fields and measures in Power BI.
- Learn how to use ETL tools (e.g. M code in Power BI) for more advanced transformations.
- Strengthen your data storytelling skills by leveraging interactive reports in Power BI.
- Master the 10 Tips to get actionable insights from data.

Learning Outcome

- You'll be able to integrate and transform data across multiple sources using Power Query.
- You'll start building dynamic Power BI reports, reducing the need for manual data updates.
- You'll be able to use DAX to create meaningful business metrics.
- Your data storytelling will be more interactive, automated, and insightful.

SPECIALIST

Exclusive Audience

- Only about 3% of users will reach Level 5.
- Training is not designed specifically for this group.
- Coaching and support can assist those nearing this level.

Empowered Business Analytics

- Users may leverage multiple tools beyond Power BI and Excel.
- The emphasis remains on business-driven analytics.
- Support aims to enhance their decision-making capabilities.

High-Level Business Professionals

- Target users are senior business leaders and decision-makers.
- They are not IT experts or big data specialists.
- Their focus is on strategic insights rather than technical details.

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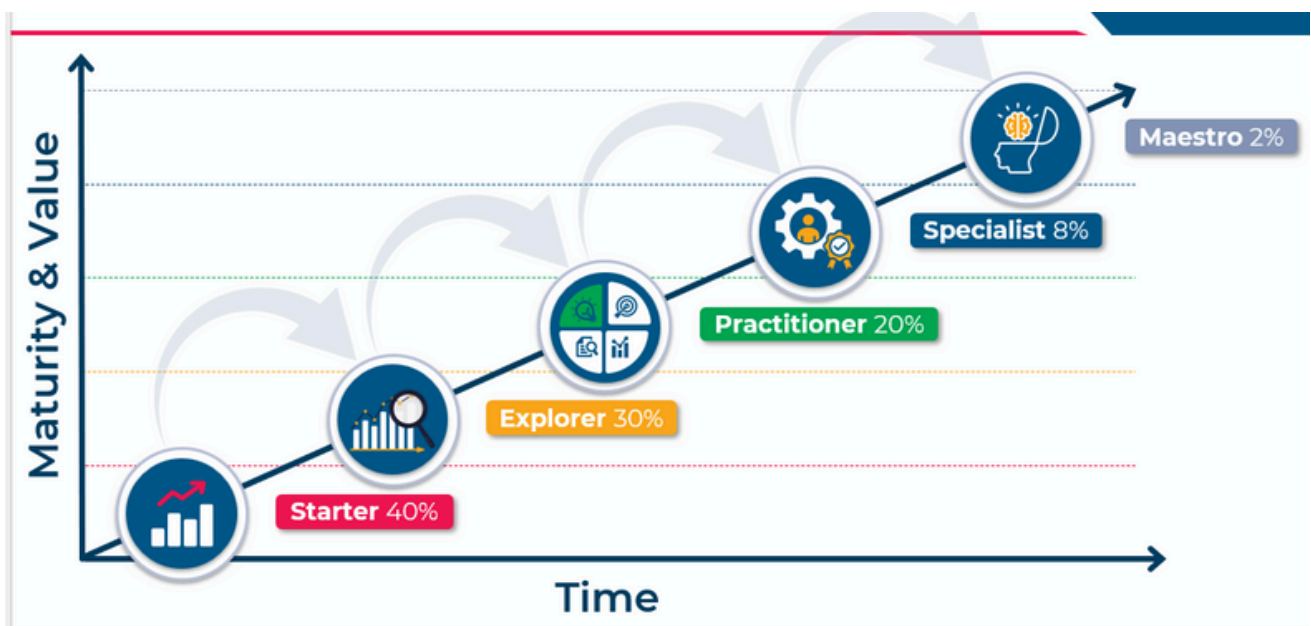- Their focus is on strategic insights rather than technical details.

FRAMEWORK WORKS

The framework uses two simple axes:

- The **Y-axis** shows maturity and the value added to the business.

- The **X-axis** shows time, because data maturity is a journey.

As people move up the framework, they become more confident and more valuable. They save time, reduce errors, and make stronger decisions.

This is not about rushing to the top. It is about understanding your current state and taking the next best step. Whether through micro- learning, coaching, or project-based growth, progress is always possible.

USE CASES

Organisations use the Data Maturity Framework in many ways:

- To diagnose current skill levels across teams

- To plan personal and team development paths

- To improve how departments share and use data

- To build a performance culture based on insight

- To boost confidence in using data at all levels

It is particularly effective in data analytics training programmes, FP&A development, digital transformation efforts, and leadership coaching.

KEY TAKEAWAYS

- The Data Maturity Framework is a practical guide, not a certification or course.
- It helps individuals and teams make sense of their data skills.
- It supports real business improvement, not academic theory.
- It is flexible across tools, roles, and industries.

By understanding where your team sits today and giving them the right support to move forward, you build a stronger, more capable workforce ready for modern business challenges.

Performance-Focused:
Training aligned with business objectives.

Practical Application:
Utilises real company data for hands-on learning.

Personal Coaching:
Tailored support provided when needed for optimal learning.