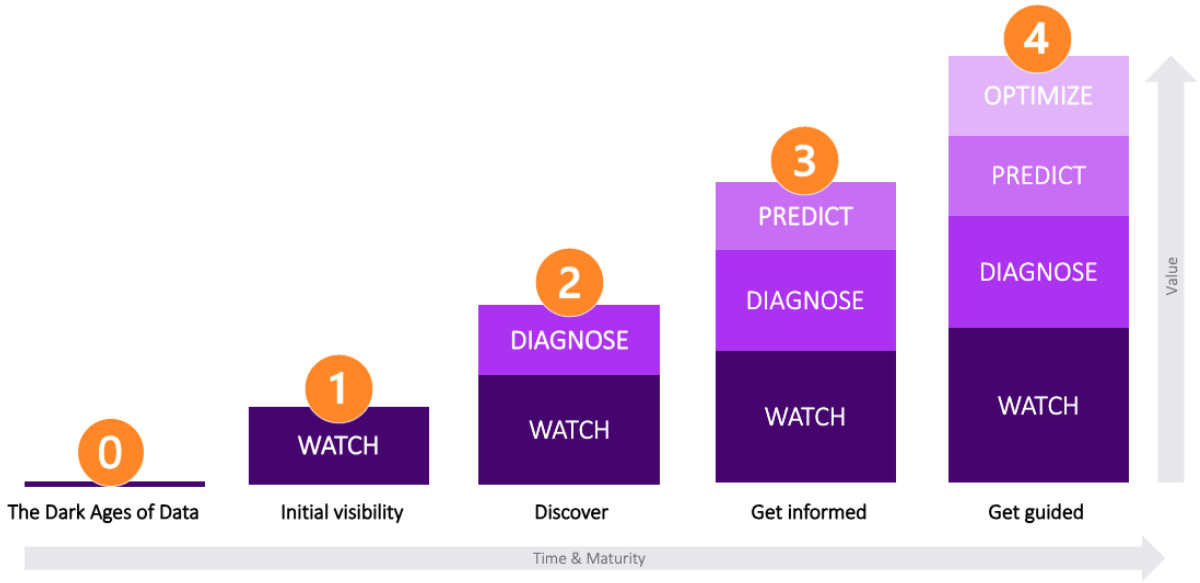
Data Maturity Workshop Moderation Guide

We use a simple five-stage model to assess digital maturity. It's not about judging whether you're "good" or "bad"—it's about understanding your starting constraints so you can make smart decisions about what to tackle first.



- **Stage 0: The Dark Ages of Data** — Your starting point. You have SCADA systems, PLCs, DCS systems, or digital metres collecting data. The instrumentation exists. The data exists. But it's trapped inside those systems, inaccessible to anyone outside the control room. From the Data Platform Capability Map perspective, this is just the left side of Figure 21—data sources with no connections. We call this the "Dark Ages" not because your SCADA system isn't sophisticated (it might be excellent), but because the data can't escape.
- **Stage 1: Initial Visibility, or the "Watch" stage** — You've added historians, MES systems, or basic data collection platforms. Users can now access data if they know where to look or what queries to run. But context is still missing. Tags like `L15.T01A.PV` mean something to an experienced operator, but not to a data scientist. Data is visible, but not understandable.
- **Stage 2: Discover, or the "Diagnose" stage** — Asset hierarchies are defined. Production context links sensor data to batches, products, and orders. Maintenance records tie to specific equipment. This is where real scaling begins, because context makes data reusable across use cases.

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- **Stage 3: Get Informed, or the “Predict” stage** — With clean, contextualised data, you can build predictive models. Maintenance shifts from reactive to proactive. Quality issues get flagged before bad product ships. Whether you use simple statistics or complex AI doesn't matter—both become viable when data is trustworthy and contextualised.
- **Stage 4: Get guided, or the “Optimize” stage** — You're no longer just observing; you're actively guiding decisions. The platform suggests setpoints. Models recommend parameter adjustments. Closed-loop optimisation runs within defined guardrails. This is the promised land, but getting here requires mastering everything that came before.

Most organisations sit somewhere between Stage 0 and Stage 2. Companies with minimal automation hover around Stage 0 or 1. Plants with serious OT footprint typically land at Stage 1 or 2, with isolated projects pushing into Stage 3. That's not a problem—it's reality. Where you are determines what you should do next.

Running the Assessment Workshop

The simplest way to use the Data Journey Model is in a workshop with stakeholders from IT, OT, and Operations. The goal isn't to produce a perfect technical roadmap—it's to surface the perception gaps we talked about earlier and build consensus on what actually matters.

Without a structured approach, these discussions quickly become messy, opinion-driven, or dominated by the loudest voice in the room. IT insists you're already at Stage 3 (“Didn’t we enable Copilot for you?”). Operations argues you're barely at Stage 1. Meanwhile, the real work—identifying what to build next—gets buried in debate.

Here's our simple yet effective way of working: (1) Start by identifying the Current State, (2) Envision the Future State and based upon the gathered information, (3) Identify the Next Step.

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Start with the Current State

Put the Data Journey Model on a large board—physical or virtual, make sure to explain the concept to everyone in the room, but don't take too much time and don't provide too many examples. Next, give everyone sticky notes (tip: you can use different colors, but you don't have to).

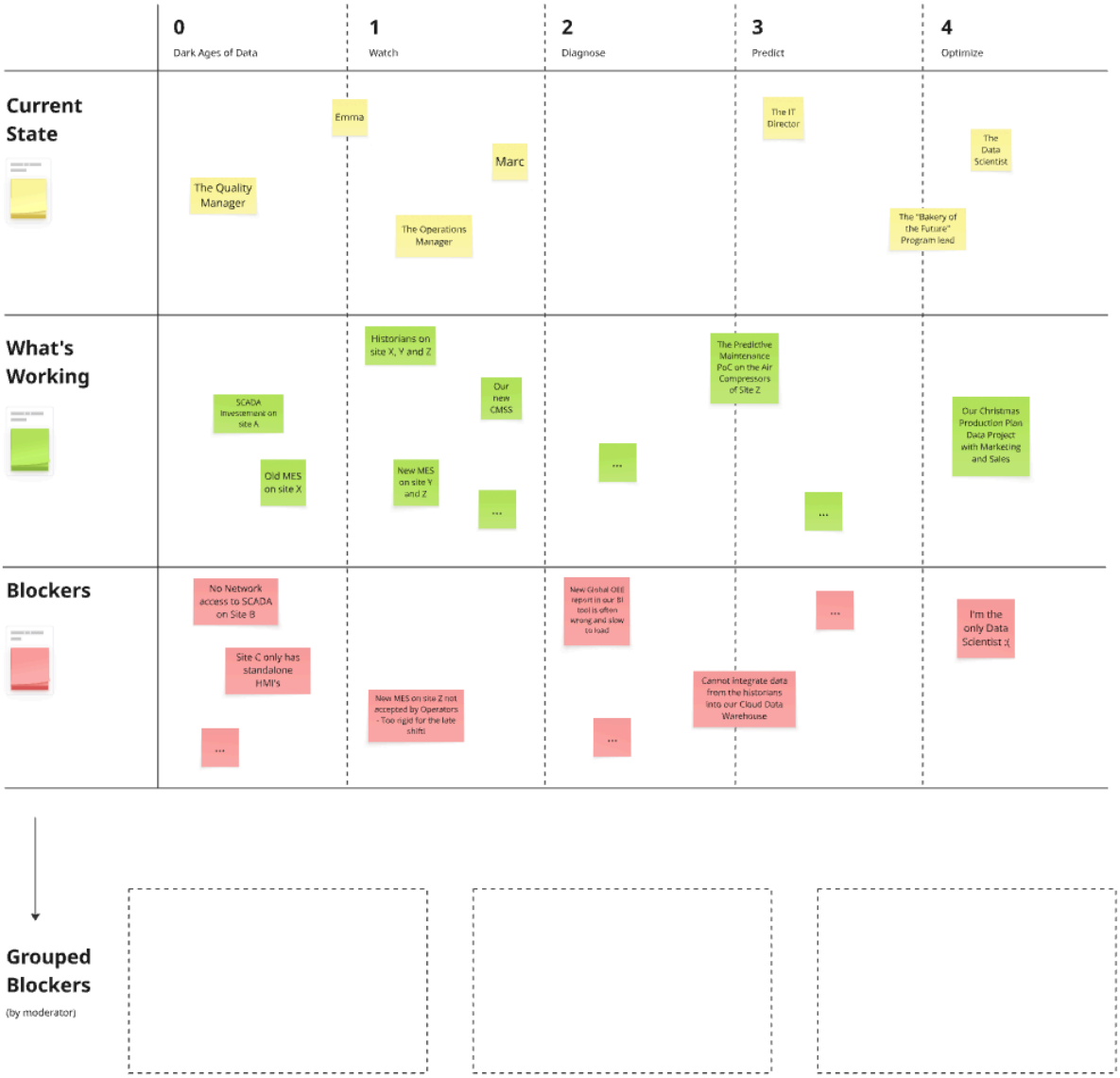
- **Assess Current State**
  Ask each participant to place a sticky note (e.g. yellow) where they think the organisation sits today (preferably ask participants to write down their name and or function as well).
  What usually happens: IT clusters around Stage 2-3. Operations hovers near Stage 0-1. The visual gap makes the perception problem undeniable.
  Typical pitfall: Don't discuss yet, just collect perceptions (even if they are wrong).

- **Identify What's Working**
  Ask participants to identify what's working today. What systems or tools are already delivering value? Ask them to write down examples on sticky notes (eg green) and put them in the Stage that matches best.
  Let the moderator read through each green note so everyone understands what's currently working across the organisation.
  What usually happens: IT learns things from Operations they never heard of (and vice versa)

- **Surface the Blockers**
  Ask what's blocking progress to the next stage in the perception of all participants. Literally as: "What is holding you back today to move to the next stage?". Is it missing technology? Lack of skills? Organisational silos? Budget constraints? Data quality issues? Get these blockers visible on a (red) sticky note.
  The moderator reads through the notes, grouping similar blockers together.
  What usually happens: The same type of blockers will emerge
  Typical pitfall: Ask participants to be specific, not "we need better data"

By the end, you've achieved shared understanding: where perceptions diverge, what's working, and what's genuinely blocking progress.

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Define the Future State

Now that you've established where you are and what's blocking you, it's time to look forward. Ask participants at which stage they want to end up—and more importantly, why. What would make their jobs easier? What problems would disappear? What decisions could they make faster or better?

This is the inspirational part—the future beacon you're working towards. But inspiration without grounding becomes fantasy. The trick is finding the balance: ambitious enough to be worth the effort, realistic enough that people believe it's achievable.

Before participants start dreaming, establish the timeframe. We typically recommend a **2-3 year horizon** for this exercise. Long enough to make meaningful architectural progress, short enough to remain concrete and accountable. If people start talking about what they want in 10 years, you'll get vague aspirations ("fully autonomous Operations!") that provide zero guidance for what to build next quarter.

Ask participants to write down their future state aspirations on (blue) sticky notes and place them on the board. Encourage specificity: not just "Stage 3," but what they'd actually be *doing* at Stage 3.

A couple of tips for the moderator:

- Frame the question explicitly: "*In 2-3 years, at which stage do you want to be operating, and what would that enable you to do that you can't do today*?"
- Good future state statements describe **outcomes and capabilities**, not (technological) shopping lists. If you see too much technology, ask what it will solve.
- Watch for the group dynamic. Someone will inevitably push for the most advanced stage because it sounds impressive or they've seen a compelling vendor demo. That's OK, but it can easily start dominating the discussion (by the way, that is also what makes using sticky notes so powerful, if everybody writes, you take away the strong opinions) .
- No judgement at this stage. You're collecting ideas, not critiquing them. Even if someone proposes something unrealistic, capture it. The filtering happens in the next step.

The moderator goes through each note, making sure everyone understands each other's aspirations. This is crucial—IT's vision of "predictive maintenance" might look very different from Operations' version. Surface those differences now.

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By the end of this phase, you should have a shared vision that's both inspiring and achievable. IT understands what Operations actually needs. Operations sees how IT's platform thinking could solve their daily frustrations. Everyone can point to the board and say, *"That's where we're headed, and here's why it matters."*

Identify the Next Step

With the current state and future state identified, the gap becomes obvious. Now comes the filtering: what can you actually do in the next months that moves you forward?

Use the following criteria to evaluate ideas:

- **High Enablement** — Will implementing this idea enable new use cases to be added quickly?
- **High Value** — Does this solve a genuine pain point?
- **High Impact** — Will people notice when this works?
- **High Visibility** — Marketing is more important than you think, high visibility often leads to easier budgets for the next idea.

The sweet spot sits at the intersection of multiple of them. Find it, and you've identified your first use case(s). There are several ways to score the different ideas from the “future state”, but one simple idea is to give everyone 4 voting points they can distribute however they want over all ideas, based on these criteria.

One side note: the exact method you use to run this workshop is less important than ensuring the right people are in the room and willing to engage honestly. If the group genuinely wants to collaborate and improve, a grassroots initiative can gain traction quickly. But the moment ego, internal politics, or conflicting agendas dominate the conversation, even the best frameworks won't help. You can't workshop your way out of IT and OT stuck in silos.

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