

# Operations and Insights

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Operations and Insights is responsible for the overall organization, administration and reporting for their functional department and uses data, insights and trends to recommend and inform department strategic planning and committee focus.

## Operations: organization, administration and reporting

- Ensures compliance with volunteer application/approval status to aid in the maintenance of an automated department volunteer database
- Maintains records and repository of regional best practices/training/SOPs
- Ensure all team members have up-to-date tools/resources; check resources for accuracy and consistency
- Maintains and tracks any department-relevant data, reports and/or other metrics (i.e. KPIs, goals, etc)
- Manage department calendar, meeting organization and agenda creation
- Manage cross-functional coordination/meetings as needed to align on planning and needs

## Insights: using data, insights and trends to recommend and inform department strategic planning and committee focus

- Liaison to Market Research (MR)\*, requesting research and data analysis to make better-informed decisions/find trends to support the needs of the region. Examples include but are not limited to:
  - Research company/individual/market data to prioritize committee focus
  - Analysis of existing customer, industry and other data to find trends
  - Provide HBA's survey results for relevant insights into members, companies, segments, etc
  - Conduct additional targeted or ad hoc research as needed to support regional/functional strategy
- Work cross-functionally within the region to pull together relevant data, insights and trends to inform planning
- Use and share insights gleaned to provide suggestions, improvements or inform strategic planning and focus

*\*Note: this individual/team is not responsible for doing the data/trend analysis themselves (which is a function of MR), but instead liaises with MR in requesting needs for the department*

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