



# The Rise of Middle Office Data Ops

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# What is the Middle Office?

Middle Office Data Ops help organizations operationalize data across departments to power decision making and execution

- The concept of the Middle Office was born in the financial services sector regarding operational teams dedicated to directly supporting the “Front Office”, or revenue-generating, employees
  - Key responsibilities include: risk management, financial control and compliance, analytical and strategic support and IT
- Although the term “Middle Office” has historically been exclusive to finance services, the concept applies to all industries
  - The Middle Office serves as a critical liaison between the strategic parts of the business (front office) and the operational / administrative functions (back office)
- The Middle Office can be thought of as the central nervous system (“CNS”) of an organization; the Middle Office:
  - Orchestrates data workflows and integrates information between client-facing and operational sides of a business
  - Facilitates inter-departmental collaboration and strategic decision making

The Modern Organization – Introduction of the Middle Office		
Front Office	Middle Office	Back Office
	<b>Strategic Role</b>	
▪ Client-facing	▪ Employee-facing	▪ Employee-facing
	<b>Key Responsibilities</b>	
▪ Revenue-generating and mission-critical business users	▪ Operational data liaisons between front and back office	▪ “Keep the lights on” resources
	<b>Departments</b>	
<ul style="list-style-type: none"> <li>▪ Executive Team (CEO, CTO, COO, CFO, CHRO)</li> <li>▪ Sales &amp; Marketing</li> <li>▪ Customer Success (CX) and Customer Service (CS)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Go-To-Market Ops</li> <li>▪ People Ops</li> <li>▪ Financial Ops</li> </ul>	<ul style="list-style-type: none"> <li>▪ IT and Support</li> <li>▪ Human Resources (HR)</li> <li>▪ Finance / Accounting</li> <li>▪ Legal</li> <li>▪ HR and Operations</li> </ul>

# Middle Office Evolution – How We Got Here and What Now?

Middle Office Data Ops fundamentally transforms the way organizations collect, manage and operationalize data across all departments

## 1.0 – Manual Data Operations

Excel Spreadsheets and Simple Databases managed by IT teams

- Bespoke data management processes live within individual business tools (Salesforce, ERP, HCM, etc.)
- Dedicated data management and IT teams focused on individual applications and departments
- Takeaway: slow, expensive and error-prone

## 2.0 – Big Data and Data Transfer Tools

Census, Hightouch, Fivetran  
Databricks, Dataiku, etc.

- Data tools focused on delivering value to engineering teams, not business departments
- Data tools “gate-keep” mission critical information and dismiss the democratization of data across the organization
- Data & IT teams create organizational bottlenecks for front-office teams adapting to company needs in real time
- Takeaway: siloed data, inefficient & unresponsive to changing needs

## 3.0 – Middle Office Data Ops

- The widespread adoption of data warehouses / lakes (i.e. Snowflake, Redshift, etc.) creates a communal data layer across departments
- Mid-Office Data Ops tools create the ability to “unlock” siloed data and democratize access across the organization
- No-code and low-code capabilities allow non-technical business employees to be self-sufficient and remove the dependence on IT for data / analytics to advance strategic business initiatives
- Takeaway: universal visibility and workflow automation driven by “unlocked” data

# Key Trends and Dynamics Shaping the Market

## Data can be more of a problem than a solution

- Unstructured corporate data is growing exponentially, but access to actionable data is limited
- Data is often “stuck” across disparate systems and departments causing significant complexity and integration pain
- Overcrowded tech stacks and non-standardized data collection / management processes lead to dirty, disconnected data and complicated business processes
- Unusable data is worthless data; most organizations are data-rich, but information-poor, having no good way to operationalize their datasets

## Data operationalization is in the wrong hands

- Core consumption of analytics has shifted away from IT and analytics professionals to key business users
- Front office business users need to move quicker than ever – much faster than IT is capable of
- There is a need for cross-departmental collaboration to enable organizational scalability – to accomplish this, organizations need to put actionable data in the hands of business users and key decision makers
- Low/No-code platforms are necessary to enable self-service access for business users to access/ operationalize/ analyze data without need for IT intervention

## The AI revolution is finally here and here to stay

- Manual processes and human horsepower are no longer capable of keeping up with the increasing speed and complexity of fast-growing organizations
- Technology’s processing power is needed more than ever to support and manage expanding corporate data sets and increased expectations on data and analytics initiatives
- AI is data automation’s best friend, and AI has arrived just in time to supercharge Middle Office Data Ops tools

## Humans continue to be at the heart of decision making

- Actionable data and analytics certainly help provide factual support, but key decisions are ultimately made by humans
- High-performing organizations effectively leverage data and technology to augment and accelerate uniquely human decision-making abilities, not replace them

*Organizations increasingly rely on data and analytics to drive decision-making, but struggle to get value out of their departmental data – **these companies will turn to Middle Office Data Ops platforms to get the job done***

# Sub-Sector Deep-Dive: Go-To-Market (“GTM”) Ops

GTM Ops teams coordinate the collection, analysis and utilization of data across various organizational functions to enable GTM teams to deliver a unified, effective market approach and successfully introduce, promote, sell and support a product or service in the market

- GTMOps teams allow departments across the GTM organization (revenue, marketing, customer success, etc.) to operate with a shared set of processes, strategies and goals
- Gathering and analyzing market / customer data enables quicker responses to changing market conditions, customer needs and competitive landscapes, ensuring agility and relevance in the marketplace
- The GTMOps team works as the conduit between the GTM organization, executive leadership, finance and legal; and allows GTM and finance to stay in sync to optimally allocate resources and capital

## Key Applications and Use Cases



Revenue Operations (“RevOps”)



Marketing Operations (“MarOps”)



Customer Operations (“CustOps”)

75%

Of high-growth companies will employ RevOps for end-to-end revenue production by 2025<sup>1</sup>

3x

Organizations that deployed RevOps grew revenue nearly 3x faster<sup>2</sup>

87%

Of GTM employees said the manual triage of data is the top time-wasting task that hampers work<sup>3</sup>

### Current Pain Points:

- Static data, lack of clarity on what to measure and resulting ambiguity in decision making
- Loose feedback loops to report issues or make suggestions / changes in the GTM funnel or customer lifecycle
- Need to be dynamic, move-fast and adapt to changing market conditions / customer reactions to avoid sales stagnation and disjointed customer experiences

### The Solution:

- Prescriptive, actionable insights for customer-facing teams to achieve a clear, unified goal
- Data accessibility and centralized metrics promote organization-wide ownership over monitoring daily operations and aligning with the broader mission / vision
- Access to clean, connected, real-time data to automate manual GTM tasks and workflows (lead lifecycle management, campaign engines, customer onboarding, etc.)

# Sub-Sector Deep-Dive: People Ops

People Ops is a shift away from traditional admin-focused HR to emphasize strategic people management – leveraging a data-driven framework to connect talent-related decisions to the outcomes that deliver the most value

- People Ops teams exist to help the business leverage its talent and maximize output by motivating and engaging employees
- The Peoples Ops team is effectively an “employee success” team – empowering employees by understanding individual strengths and weaknesses to provide the tools, feedback and guidance to help achieve the organization’s broader goals
- People Ops manages internal talent data to better marry employee experience and operational performance

## Key Applications and Use Cases



Recruitment and Talent Management



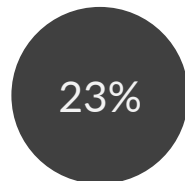
Workforce and Performance Management



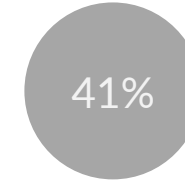
People / HR Analytics



Of employees are not engaged and “Quiet Quitting”<sup>1</sup>



Of employees are engaged at their workplace and “thriving”<sup>1</sup>



Of disengaged employees are frustrated with leadership engagement and culture and would likely stay if changes were made<sup>1</sup>

### Current Pain Points:

- Organizations are struggling with an increasingly disengaged workforce leading to “The Great Resignation” and “Quiet Quitting”
- HR is typically the least data-centric department within an organization – often data rich, but insight poor, which hinders strategic decision making
- Struggle to balance leadership objectives (strategic goals, financial management / investor expectations) with employee success/ development/ satisfaction

### The Solution:

- Leverage analytics to better understand employee sentiment and implement swift organizational changes to improve workforce engagement
- Connect individual employee performance with company goals

# Sub-Sector Deep-Dive: Financial Ops (“FinOps”)

Financial Ops (“FinOps”) teams consolidate, clean and manage data across all departments to enable the organization to track, analyze and understand its financial performance and make educated decisions on how to best allocate resources

- FinOps enables the strategic allocation and stewardship of financial resources, focusing on efficient systems and processes, compliance, and guiding overall business operations and decision-making
- Often referred to as the “Office of the CFO”, FinOps represents a new cross-functional management approach to face the challenges associated with broadened CFO responsibility – the role of the CFO has evolved from traditional FP&A and increasingly toward strategic decision-making
  - An effective, expanded CFO function necessitates the aggregation, integration and operationalization of expanding amounts of financial and business data – FinOps helps meet these challenges

58%

Of CFOs plan on increasing IT / Digital transformation spend over the next 2 years, regardless of economic circumstance<sup>3</sup>

64%

Of CFOs believe autonomous finance will become a reality within the next 6 years and will require an immense amount of data to be successful<sup>4</sup>

## Key Applications and Use Cases



Strategic Finance (Budgeting & Forecasting)



FP&A Data Management



Cost Monitoring and Management



Benchmarking and KPIs

### Current Pain Points:

- Finance teams often struggle to create valuable reports and analyses due to lack of usable cross-department data
- CFOs are frustrated trying to meet increasing Board / Executive requests for accelerated planning, execution and analysis cycles with lack of access to the data needed to do get the job done
- Human intelligence can no longer keep up with data processing needs to get the most out of their organizations expanding datasets

### The Solution:

- FinOps teams serve as the single source of truth for organizational data, utilizing Middle Office Data Ops tools to help identify where they should be looking and deliver actionable insights derived from the data

# Middle Office Market Landscape

## GTM Ops

- AVISO BoostUp Census
- claravine Clari correlated
- ebsta Endgame fullcast.io
- hightouch houseware HubSpot
- improvado Integrate.io LeanData
- MadKudu OPENPRISE people.ai
- Pitchly Pocus QUOTAPATH
- Rattle revVana sonar
- Swantide SYNCARI VERIFY

## People Ops

- Abode betterworks COGNOTA
- complete crunchr erudit
- bob Humans humanforce
- Humanalyze illoominus Kahuna
- knøetic leadr OneModel
- Peoplelogic PerformYard praisidio
- ProFindaPR FIT.CO RisingTeam
- TALENTGUARD TalentNeuron VISIER
- WORKERA Worklytics

## Financial Ops

- aiwyn Anaplan board
- brightflow.ai CAUSAL cobbler
- cube datarails everstage
- finout FORMA.AI m3ter
- mosaic nOps planful
- Prophix Spendflo Stratify
- yft Vega

Process Workflow and Data Integration

boomi MuleSoft talend tray.io workato zapier\*





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