



Digital Value and the Future of Work: Why Your Data Strategy Matters More than Your Dashboards

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UN Virtual Day, May 11, 2026

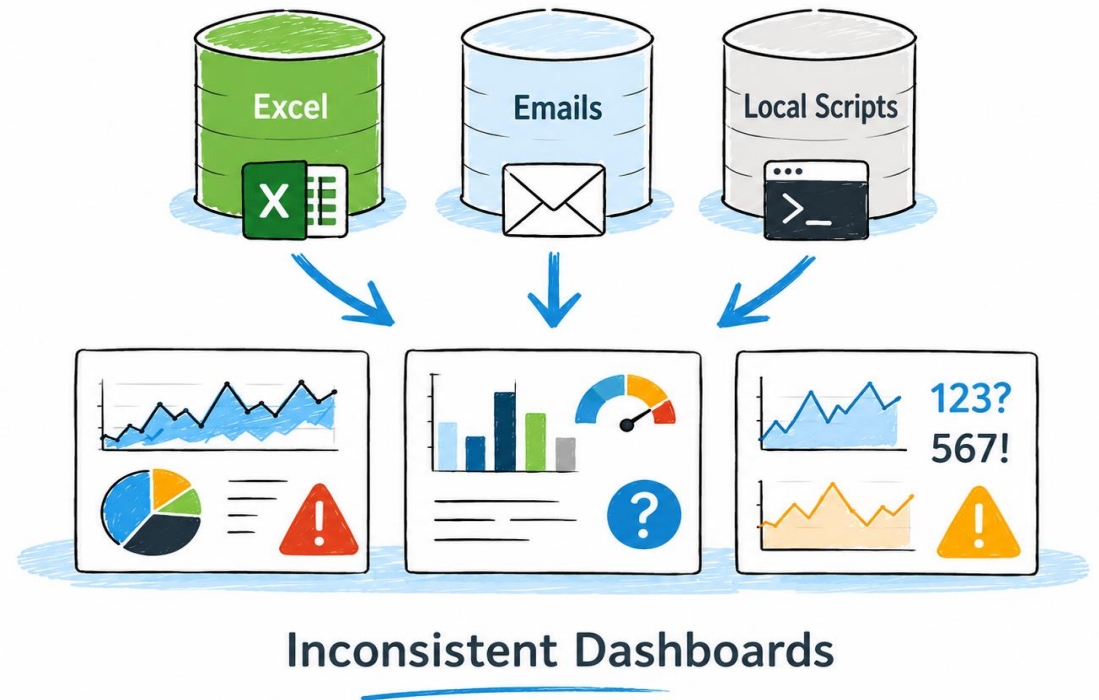


The Problem: Dashboards on Shaky Foundations

Many organizations talk about AI and digital transformation while still relying on scattered Excel files, “dark data” and ad hoc SQL/Python scripts in business teams.

Dashboards often sit on inconsistent, manually reconciled data; every report refresh restarts the reconciliation cycle.

Result: high effort, low trust, and limited capacity for higher order analysis.



Data Strategy vs “More Dashboards”

A data strategy defines how you structure, govern and secure data; dashboards are just one of many consumption layers

Without a central, governed platform, adding dashboards increases complexity rather than insight

Value shifts from “report production” to “trusted, reusable data products” consumed by humans and AI



Why Start in the Back Office

Studies in financial services show early **AI wins come from automating repetitive**, back-office tasks: reconciliations, document handling, exception processing, finance workflows.

This builds operational resilience, frees expert time, and creates the AI ready data foundation for more advanced use cases.

Core business can often leverage AI through vendor partnerships (*e.g. market data and analytics platforms*), while internal teams focus on core operational and data plumbing.



“Automate behind the scenes first; differentiate in front once the foundation is stable.”

Why Start in the Back Office



Structure:



Call outs for: Number of key source systems, number of “critical” spreadsheets and typical manual steps to produce one core report

5/day -> 100/month

Number of major manual reports produced each month 2023 - 2025

1-2 hrs

Average time per report / reconciliation cycle

Target architecture: single, governed data platform

Centralized, governed data foundation (data warehouse / data lake / lake-house on platforms like Snowflake)
as the only source of truth.

Structured zones: curated, production grade data sets for core business.
Cybersecurity and AI governance embedded at the platform level (access control, lineage, quality checks, model governance).



Clear **data ownership and stewardship** for critical domains

Defined **business glossary and standard calculations** to avoid reconciliation debates

Strong **access control, lineage and quality rules; continuous** monitoring of data quality: accuracy, timeliness completeness & consistency

AI governance: model inventory, risk classification, independent validation, bias/fairness checks, and continuous monitoring for drift

Warehouse vs Data Lake: Getting the Balance Right

Data warehouse: structured, curated, high trust data for reporting, regulatory needs, KPIs.

Data lake: flexible storage for semi structured/unstructured data (documents, logs, PDFs) feeding analytics and AI use cases. In practice, a **lake-house** or tightly integrated warehouse + lakes allows you to support both governed reporting and exploratory AI.

From Dashboards to Spatial Intelligence: Dashboards are historically passive and two-dimensional, whereas the future of work relies on spatial intelligence and agentic AI to actively operate within the physical world. Robust data strategy is what enables organizations to move beyond simply looking at data on screens to actually interacting with it through spatial computing.

Data Strategy as the Engine: Advanced concepts like digital twins and physical AI cannot function without a highly structured, governed data ecosystem. AI initiatives risk becoming fragmented without the underlying data strategy.



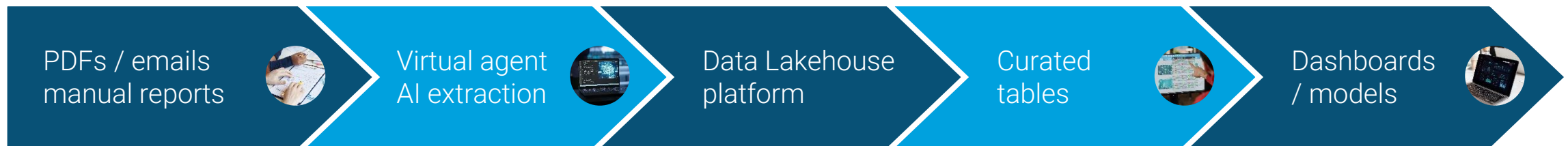
“The decision is not either/or; **it is about clarity of purpose, governance and integration.**”

Virtual Agents and Data Lakehouse platforms: Beyond Structured Data

Virtual agents and AI services can extract and normalize data from PDFs, manual reports and emails into a platform, turning “dark data” into governed assets.

Once data is in the platform, the same governance, cybersecurity and quality controls apply, enabling safe reuse for analytics and AI.

This reduces reliance on local scripts and “one off” data wrangling in Excel or notebooks.



Virtual Agents And Automation on Service Platform



Service delivery platforms, when configured correctly, can eliminate ticket triage by email and spreadsheets, and automate high volume requests.

Deep dives into existing configurations often reveal quick wins: unused capabilities, mis routed queues, missing forms.

Next phase: Virtual agents handle routine task, creating tickets automatically and triggering workflows.

Data quality: accuracy, completeness, consistency, timeliness for key data sets.

Operational efficiency: Number of automated workflows / processes and hours saved per month.

Service performance: incident resolution time, ticket deflection rate via virtual agents.

Adoption: percentage of reports/dashboards sourced directly from the central platform; number of active users.

DATA POINTS

	2023	2024	2025
Number of processes automated	0	47	116
Number of tickets managed	0	3241	4220
Time to onboarding / offboarding staff	3-4 days	<1 day	<1 day



Estimated hours saved per year from automations

Example:

Private Markets Ecosystem

Front office for private markets uses the same central platform to:

- Automate data collection from GPs, custodians and vendors.
- Support lead generation and pipeline management through integrated CRM + data platform.
- Consume portfolio performance data directly from a platform such as Snowflake (or equivalent), surfaced in a single analytics layer (e.g. Sigma).

Goal: minimize Power BI/Excel proliferation by moving calculations and logic into the governed platform.



9 data feeds, >40,000 documents

Number of private markets data feeds and documents integrated into a platform



-30%

Estimated reduction in manual steps to produce a standard private markets report



GOVERNED PLATFORM



Governance Rules for the New Model

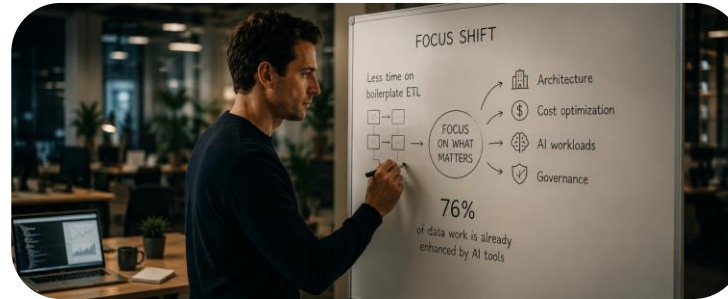
- One authoritative platform for critical data (with clear ownership).
- Common business definitions and KPI catalogue.
- Role based access, strong authentication and data masking for sensitive data.
- Automated data controls and quality checks with thresholds and alerting.
- Formal AI governance: model inventory, approvals, risk tiers, monitoring, and human in the loop for high impact use cases.



Future of Work: from Manual Support to Data Engineering



Industry analyses show AI and automation reduce repetitive data work while **increasing** demand for data engineers and analytics engineers to design AI-ready infrastructure and governance



Data engineers now focus less on boilerplate ETL and more on architecture, cost optimization, AI workloads, and governance—76% of data work is already enhanced by AI tools in some studies, with ~25% productivity gains



Manual, transactional roles based on spreadsheets and ad hoc reconciliations decline; new roles emerge data engineers, analytics engineers, data product owners, AI governance specialists

Upskilling vs Targeted Hiring

Research on digital skills shows that workers in lower digital intensity roles face the steepest upskilling challenge and are less likely to access or complete advanced training without strong organizational support.

Large scale studies indicate that the most ambitious digital upskilling tends to benefit already digitally savvy, mid /high skilled workers; many lower skilled workers struggle to transition to complex automation or data roles quickly.

This supports a dual approach:

- Proactive **workforce planning and hiring** into specialized data/engineering roles.
- Targeted, realistic upskilling for existing staff into clearly defined, achievable profiles, rather than assuming everyone can become an automation engineer.



“Upskilling is essential but slow and uneven; thoughtful workforce planning with HR and data teams is often more effective than trying to convert every manual role into an automation expert overnight.”

Before & After: How Work Changes

TODAY	TARGET MODEL
Analysts copy/paste from multiple systems into Excel.	Data engineers and platform teams maintain shared pipelines into a platform.
IT and ops staff triage tickets manually and chase information.	Virtual agents handle routine IT and ops requests; staff focus on exceptions and design.
Shadow IT scripts live on individual laptops; knowledge is fragile.	Business users consume governed data products and focus on interpretation and decisions.

Practical Steps to Get Started

- **Map your “data reality”:** key reports, manual processes, spreadsheet hotspots.
- Stand up or consolidate into a single governed data platform; migrate priority domains first.
- Embed cybersecurity, data and AI governance from day one.
- Pilot virtual agents on 2–3 high volume back-office use cases (e.g. access requests, standard reconciliations).
- **Align workforce plan:** where to hire data/analytics engineers; where to upskill; where to automate out manual work.

Our Journey So Far



	2023	2024	2025
Number of processes automated	6	10	17
Estimated hours saved per year	576	960	1,632
Estimated reduction in reconciliation breaks / incident volumes	12%	20%	34%
Increase in platform sourced dashboards vs legacy reporting	50%	60%	52.9% (*)

(*) Use of direct API integrations to scale faster, with planned consolidation into central platform.

Measuring Value: Efficiency and Quality

Data quality: accuracy, completeness, consistency, timeliness for key data sets.

Operational efficiency:

- Number of automated workflows / processes.
- Hours saved per month.

Service performance: incident resolution time, ticket deflection rate via virtual agents.

Adoption: percentage of reports/dashboards sourced directly from the central platform; number of active users.



Automated processes per year



A strong **data strategy and platform** matter more than any individual dashboard



Start with back-office automation and governance to **build trust and free capacity**



Then scale to differentiated front office AI, often via partnerships



The future of work in this model **depends on data centric roles and realistic workforce planning**, not endless manual patch work

Digital Value and the Global Digital Compact

The true "digital value" of a data strategy is its ability to build trust, ensure safety, and drive inclusive technological growth, which directly mirrors the goals of the United Nations' Global Digital Compact (GDC). Responsible data governance is the primary way nations and institutions turn global principles into people-centered action.

Q&A

