

MARKETING CLOUD INTELLIGENCE

Your 90-Day Roadmap to Intelligence Mastery



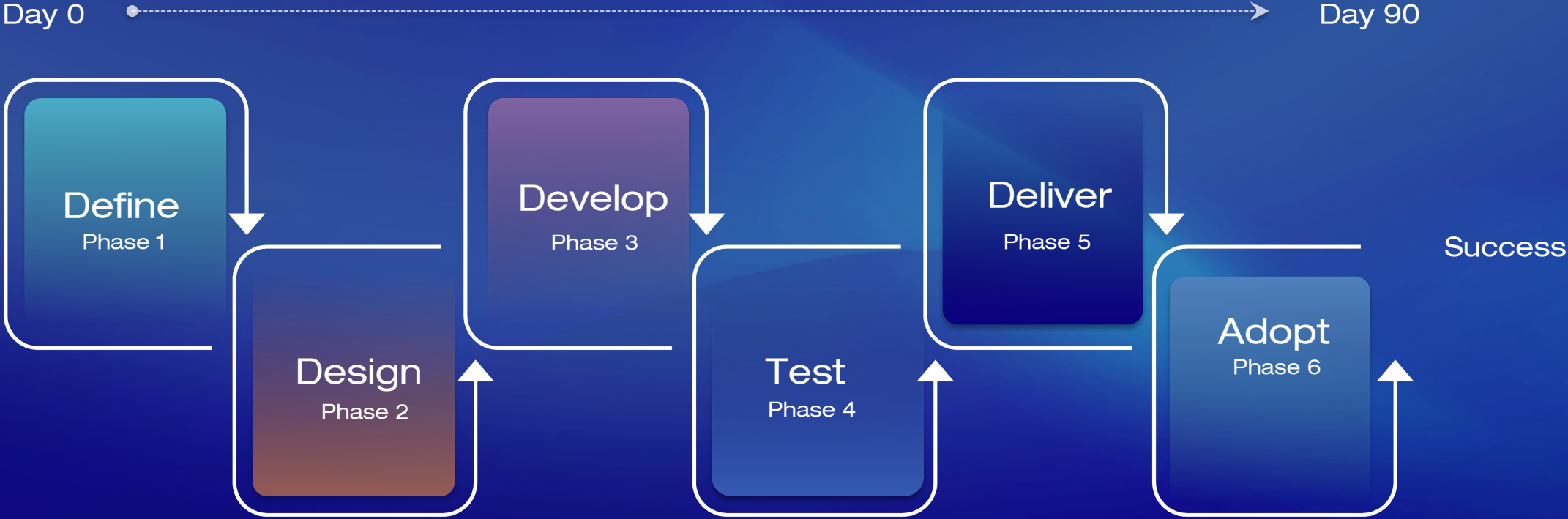
6

PHASES

Your 90-Day Roadmap to Marketing Intelligence Mastery

TIMELINE

Marketing Intelligence Mastery in 90 Days



PHASE 1

Know the Goal. Attack the Obstacle.

Define (Weeks 1–2)

Define

1. Key Moves:

- Interview stakeholders across marketing, sales, partners, and analysts to understand value
- Understand current business workflow and optimization methods
- Identify reporting bottlenecks and decision-making blind spots
- Define and agree on success KPIs: ROAS, CAC, LTV, conversion rate, etc.

2. Develop reasonable targets and assign accountability

- Inventory available data sources (CRM, paid media, GA4, chat, call center, 3rd party data, etc)
- Draft your “data-to-decisions” map

3. Define 3-year goals and a roadmap

Deliverables:

- KPI MAP, Learning Agenda, Analytics Brief
- Written Sign-off and Alignment



PHASE 2

Good Design Saves You. Bad Design Sinks You.

Design (Weeks 3–4)

Design

Key Moves:

- Define the core data model—business—first, not tool first
- Design dashboard wireframes: (1) executive snapshot, (2) campaign ROI tracker, (3) efficiency dashboard
- Document integration scope and refresh frequency
- Define the use cases and the jobs to be done framework
- Develop a testing plan
- Lock in roles, row-level access, and user governance

Deliverables:

- Data Model Blueprint
- Final Wireframes
- Integration + Technical Solutions Doc



PHASE 3

Sign It. Seal It. Then We Build It.

Development (Weeks 5–7)

Develop

Key Moves:

- Connect key platforms using APIs + Totalconnect
- Build the harmonization layer: custom classifications, calculated metrics, naming conventions
- QA the data
- Set up anomaly alerts and budget pacing
- Build, populate, and test dashboards

Deliverables:

- Connected + harmonized data
- Functional Prototype – Alpha
- Alerts & automation logic based on business rules



PHASE 4

Shared Vision. Shared Build. Shared Outcomes.
Test (Weeks 8–9)

Test

Key Moves:

- QA dashboards: match values with CRM and Sales, Ad platforms, Web Analytics, etc.
- User Acceptance Testing (UAT) with key stakeholders
- Adjust visualization logic, filters, and UX
- Train admins and power users

Deliverables:

- Final QA + UAT Sign-off
- Discrepancy Reporting
- Solutions Training Deck
- “Go-Live-Ready” Dashboards
- Technical Specifications Document



PHASE 5

Launch It Like a Product—Anything Less Fails

Deliver (Week 10)

Deliver

Key Moves:

- Final rollout to core users
 - Host live walkthroughs and async video demos
 - Share “early wins” to build momentum
 - Begin weekly usage reporting
1. Document stakeholder feedback
 2. Leverage your CRM to send out notification updates

Deliverables:

- Dashboard rollout
- Stakeholder training sessions
- Initial ROI stories
- Updated Roadmap
- Send SMS and Email adoption notifications (high and low usage, updates and features)



PHASE 6

Deliver Value & Adoption Will Follow

Adopt (Week 11–13)

Adopt

Key Moves

- Track usage metrics + user feedback
- Establish email and SMS notifications
- Expand use cases (cross-channel, cohort, and lift analysis, etc.)
- Run internal enablement workshops for non-users
- Help teams package MCI insights into boardroom-ready recommendations
- Document and celebrate success metrics

Deliverables:

- 30/60/90-Day Adoption Dashboard
- Recommendations Deck for Leadership
- Ongoing Expansion Plan



“No matter how good your stack is, if the business problem is fuzzy, the results will be too.”.

Ross C. Jenkins
CEO, Decision Foundry



WHY DECISION FOUNDRY

A Certified Salesforce Crest Level Partner



BUILD BETTER DATA EXPERIENCES

WE ACHIEVE THIS BY:

Engaging with consumers to increase coordination across stakeholders by aligning your data strategy and objectives

Decoding consumer behaviors, needs and motivations to build stronger solutions

Identifying and fixing what's reducing platform value and user satisfaction.

WE HELP YOU WHEN WE:

Identify the right KPIs and visualizations that drive action, resulting in better decision-making

Organize data in the right context to drive analysis

Implement the right features to drive adoption of platforms, reports, and dashboards



EXCEPTIONAL MARKETING & ADTECH EXPERIENCE

800+

Marketing Cloud
Projects Completed To
Date

130+

Globally Distributed
Employees

10+

Years of Experience in
Business Intelligence and
Media Performance
Analytics

1. We built the largest Salesforce MCI community on the internet—and we still run it.
2. We're not just a partner—we're the original. The longest-standing, most battle-tested MCI team in the Salesforce ecosystem.

LET'S PARTNER

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