Decision Foundry

Identifying Your Project Scope.

1. Identify the key (internal) stakeholders and functional roles required for your project:
   a) Determine how many clients (internal/external) will you support?
2. Who is responsible for signing off on the effectiveness/completion of this project(s)? Then, ensure absolute alignment.
3. Clearly describe the project success criteria for your project. In other words, what measurable metrics must be demonstrated to call this project a success:
   a) Define a common set of achievable business and user goals:
4. What are the expectations for when the project should be live in production? Why?
5. Is your use case for internal or external (client-facing) purposes, or both?
6. Are there third-party agencies and/or partners involved in this project?
7. Are there measurement plans and learning agendas that align with your project?
8. Are actionable recommendations and/or predictions part of your build?
9. Are you measuring specific outcomes for your project?

Securing Your Platform Access.

1. Assign an administrator, if one hasn't been identified.
2. Verify the number of admins, editors, and viewers assigned based on your contract.
3. Quickly determine how stakeholders will access dashboards and reports, e.g., schedule reports, embedded, datorama logins, email, SMS, Slack, etc.
4. Will you need to connect to any databases during this project, if so, which?

Verifying Your Data Sources.

1. Confirm access to all required project data sources.
   a) Be sure to have the necessary account profiles and quickly authenticate each data source.
   b) If you work with external agencies, check with them to secure all remaining platform access.
2. Do you require historical data retrieval(s), e.g., DCM, Facebook, internal files?
   a) If so, how far back?
   b) Are there any known data retrieval rate limitations or large batch files that must be ingested?
3. Are there insertion order management platforms, viewability, or other third-party billing systems that require integration?
4. Are there data definitions and/or calculation rules required to deliver audience insights, pacing, spend, or end of month billing reconciliation? If so, which platforms?
5. Is your taxonomy managed internally through tag ops/ad ops, or maintained by a third party? If so, how clean is that taxonomy, e.g., robust reporting hierarchy, or consistent naming conventions used? If not, where are the challenges?

Confirming Your Reporting Requirements.

1. Do you have access to clean reporting examples with representative data?
   a) If so, are you prepared to walk your stakeholders through them in detail?
2. Are there any special calculations leveraged to recreate your reports, tables that must be joined, forecasting or attribution methods that must be considered in your implementation?
   a) Which business questions, or decisions, will you make because of this project? Are there specific targets/goals to track?
3. Can you describe which entities are used to connect ("join") different data sources, including ID, Campaign Name, etc.
4. Have you documented the logic for any data classification required?
5. Have you defined the primary KPIs you are interested in tracking? (E.g., delivery metrics, conversion/revenue metrics, etc). If there any custom KPIs, how are they calculated?
6. When presenting KPIs, what breakdowns or reporting hierarchies need to be presented, e.g., Business Unit, Product, Geographic Area, Campaign, Tactic, Audience, etc.? How are they synthesized, extracted, or derived on a per data source basis?
7. Are there SMEs who can verify any potential data challenges that could result in less-than-optimal reporting? For example, which previously defined business rules, or custom defined grouping of data sets, may cause noticeable discrepancies if not implemented correctly?

Considering What Happens Post Launch.

1. Do you have a plan for monitoring usage and ongoing adoption?
2. Have you prepared a product roadmap and an onboarding experience?
3. Will you provide ongoing training and support?
4. Is there a plan for rolling out the platform to your organization?
5. How will you capture customer feedback?

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