Decision Foundry

Identify Your Project Scope.

1. Identify the key (internal) stakeholders and functional roles required to complete your project:
   a) Determine how many clients (internal/external) will you support? Then, confirm the no. of licenses or level of access you need.
2. Who is responsible for signing off on the effectiveness/completion of this project(s)? Then, ensure written alignment (sign-off).
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.
4. What are the expectations for when the project should be live in production? Why? Keep a buffer and create accountability for all. Document any changes from the original plan.
5. Is your use case for internal or external (client-facing) purposes, or both? If both, your project life cycle will significantly increase.
6. Are there third-party agencies and/or partners involved in this project? Consider this step very carefully. Shadow stakeholders have a way of coming up when you least expect it.
7. Are there measurement plans and learning agendas that align with your project?
8. Are actionable recommendations and/or predictions part of your build?

Secure 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., scheduled reports, embedded, datorama logins, email, SMS, Slack, etc.
4. Will you need to connect to any databases during this project, if so, which?

Verify 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 or this may slow your project down.
   b) If you work with external agencies or partners, check with them to secure all remaining platform access. Check if there is a need for DPAs, TOMs, or similar data compliance documents that you must adhere.
2. Do you require historical data retrieval(s), e.g., DCM, Facebook, internal files?
   a) If so, how far back? Check with your Datorama AE to ensure a ticket has been submitted so that backfilled data can be set, if required.
   b) Are there any known data retrieval rate limitations or large batch files that must be ingested? Read up on all of the applicable Datorama API limitations to ensure you understand ingestion rules and limitations.
3. Are there 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? What are the calculations?
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? If required, how quickly can changes be made? If there is a change, can you ensure adherence?

Confirm 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 as a result of this project? Can you monetize this? 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 classifications 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? Ensure your stakeholders are prepared to QA and sign-off on the data.

Consider What Happens Next.

1. Do you have a plan for monitoring usage and ongoing adoption?
2. Have you prepared a product roadmap and an onboarding experience map?
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? Have you prepared a punch list?
6. And remember, this is a Product, not a project. Change your thinking around the way you deliver your solution.