QuickStart Data Roadmap and Pilot Project Guide

This QuickStart Guide is help you rationalize the metrics your company relies on and develop a plan to automate and operationalize them. The guide follows three phases: Catalog Key Metrics, Prioritize Metrics and Projects, and Execute.

1. Catalog Key Metrics

If you could only have 10 metrics to understand the health of your company and the progress of your value creation plan, what would they be? Using the table below, identify these key metrics and complete the supporting columns.

- Is the data readily available?
- Have you defined a goal for each?

Business Function	Metric Name	Logic (calculation)	Audience	Data Source(s)	Validation Source	KPI

2. Prioritize Metrics and Projects

After cataloging all key metrics and assessing the availability of data, the next step is to prioritize possible reporting areas. Ask your data strategy team the following questions:

1. Where would better visibility have the greatest immediate impact on the company?
   1. Look for a balance of light-lift and high-value
   2. E.g., Finance / BizDev / Production / Order-to-Cash Performance
2. What business outcome do we want to impact?
   1. E.g., Customer lifetime value
3. What is the current and desired state of that business outcome?
   1. E.g., Current avg LTV of $350K/customer, goal of $500K by EOY 2022
4. What roles are accountable for delivering that outcome?
   1. How many resources in each role?
   2. How often would they ideally view the report/dashboard?
5. For each role, what is the narrative for assessing status, analyzing root causes, and taking action?
   1. E.g., View Customer LTV trend for trailing 12 months against goal; View LTV by region (or customer class); Rank highest-value and lowest-value clients; Filter to Sales Manager and Account Executive for under-performing clients

3. Select Pilot and Execute

After prioritizing metrics and reporting areas, coordinate with your data strategy team to design end-stage reports and connect to data:

Design

Wireframe (whiteboard) the dashboard and vet with key stakeholders:

a. Does each element drive a decision or action?
b. Are any questions left unanswered or require cross-reference to other data?
c. Are goals or KPIs applied to each metric?

Execute

Power BI uses a drag-and-drop interface. With some basic training, data can be connected, and functional reporting can be developed in short order.