



Assessing Your Current Data

# **Current Data Checklist: First Steps to Taming the Chaos**



## Current Data Checklist: First Steps to Taming the Chaos

The key to making your data work for you lies in establishing a robust data architecture and semantic models, turning data that's already yours into actionable insights, better decisions, and accelerated growth.

This checklist will walk you through every step you need to take in order to get your business's data under control.

## Initial Steps

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Complete these steps first to ensure you understand everywhere your data lives and how it's falling short. Then, establish what you need to do to better leverage it.

### 1. Identify all data sources

- Include often-forgotten apps (e.g., timekeeping, HR, logistics)
  - Main business software (CRM, ERP)
  - HR management system
  - Time tracking app
  - GPS tracking for company vehicles
  - Customer support ticketing system
  - Social media analytics tools

### 2. Pinpoint problem areas

- Focus on areas needing insights to impact profitability or improve operations
  - Lower worker utilization rates
  - Excessive idle time in production
  - Frequent delays in factory deliveries
  - High customer churn rate
  - Inefficient inventory management

### 3. Set priorities

- Consider potential ROI, effort required, and time constraints
  - Time-sensitive: Addressing a sudden drop in sales within the next month
  - High ROI, low effort: Analyzing existing customer data to improve retention
  - High ROI, high effort: Implementing a new data warehouse for all departments
  - Low ROI, low effort: Creating basic reports on office supply usage

## Foundation-Building Steps

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Once you've established everywhere your data lives and what it needs to do, the next steps are to make sure your data works for you, your organization, and key stakeholders.

### 4. Evaluate data priority

- Ensure data is relevant and matches business goals
- Check if systems are used as intended

### 5. Review data governance and access

- Identify easy and difficult data sources
- Consider consolidating data in a central location

### 6. Examine data accessibility

- Determine who should have access to what data

## 7. Define business rules for metrics and KPIs

- Establish one source of truth for how key measurements should be calculated

## 8. Uncover and assess "Shadow BI"

- Identify unofficial systems used by employees
- understand why these systems are important and include them in your overall BI plan

## 9. Evaluate current data infrastructure

- Assess the state of existing data warehouses or systems
- Determine your organization's data maturity level

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