

CHECKLIST

Strategic Decision Checklist

Uncover gaps and opportunities with these critical questions

IDENTIFY DECISION TYPE

- This is an operational decision focused on optimizing daily data operations or workflows.
- This is a strategic decision that will influence the long-term data and BI direction or analytics capabilities of the organization.

VALIDATE INSIGHTS (DATA CHECKPOINT)

- The data used to guide this decision is clean, accurate, and timely.
 - If not, necessary steps have been taken to ensure data quality before moving forward.
- The data is aligned with key business objectives and regulatory compliance standards.

MAP POTENTIAL RISKS

- Financial risks have been considered, including potential impacts on budget and profitability from changes to data infrastructure or tool investments.
- Reputational risks have been assessed, including how data privacy and compliance issues could affect brand perception.
- Operational risks have been evaluated, such as resource allocation challenges, system integration hurdles, or process disruptions.

ENSURE STAKEHOLDER BUY-IN

- The key stakeholders—such as leadership, IT, and data teams—have been identified and are aligned on the decision.
- There is full alignment on the proposed path forward with all relevant stakeholders.
 - If not, steps have been taken to resolve any misalignments before moving forward.

CREATE EXECUTION PATHWAY (WITH KPIS)

- Clear implementation steps for the decision have been defined, focusing on data integration, tool deployment, or process improvement.
- Measurable KPIs have been set to track progress, such as improvements in reporting speed, data accuracy, or system uptime.
- The execution plan is structured in phases, with clear milestones to assess progress and pivot if needed.

MONITOR AND ADJUST (FEEDBACK LOOP)

- A process to gather continuous feedback on data usage, system performance, and alignment with business goals has been established.
- The strategy is adaptable based on real-time data, user feedback, and evolving business needs.

CONSIDER ALTERNATIVES & TRADE-OFFS

- Alternative options for addressing the challenge have been explored, such as different tools, processes, or data architectures.
- The trade-offs between alternatives have been weighed, considering both short-term gains and long-term sustainability in the data environment.

LONG-TERM IMPACT & SUSTAINABILITY

- The decision aligns with the company's long-term data strategy, enhancing analytics capabilities, improving decision-making, and supporting digital transformation.
- The sustainability of this decision has been considered, ensuring it can scale with business growth and future technology shifts.

LEGAL & COMPLIANCE

- The legal and regulatory implications—particularly around data privacy, security, and compliance in the jurisdictions where we operate—have been evaluated.
- Any compliance risks have been identified and mitigated, especially when integrating data across systems or sharing data with third parties.

COMMUNICATION & CHANGE MANAGEMENT

- A clear communication plan is in place to inform all relevant teams about the changes and decisions, ensuring transparency and alignment.
- The necessary change management processes have been accounted for, including training teams on new systems or processes and ensuring smooth adoption.

RESOURCES & CAPABILITIES

- The necessary resources—both financial and human—are available to successfully implement this decision, especially for data infrastructure or analytics tools.
- Skills gaps in the team have been identified, and steps are in place to address them.

CONTINGENCY PLANNING

- A contingency plan is in place to address potential setbacks, such as delays in data integration, system failures, or unanticipated compliance challenges.

SCORE YOURSELF STRATEGICALLY

- Do your answers reveal blind spots or missed opportunities?
- Which areas represent the greatest value if optimized?
- Do you have the right partners, resources, and frameworks to act?