

Business Data Decision Checklist

Determine the Level of Data Support Your Business Needs

How to use this:

Read each section and check the statements that feel true *today*.

The section with the most checks usually indicates the **right starting point**, not where you “should” be.

Step 1. Decision Clarity Check (Foundational)

Start here. If decisions aren't clear, more data won't help.

- We regularly ask for reports but aren't always sure what decision they support
- Different leaders ask for different numbers to answer the same question
- We review data but struggle to agree on what it means
- Reports often raise more questions than they answer
- We sense something is “off” in performance but can't pinpoint why

If you checked 2 or more:

Your first need is **decision-focused analysis**, not dashboards or platforms.

Typical solution: Ad Hoc Analysis

Step 2. Urgent Question Check (Ad Hoc Analysis)

When confidence is shaken and leaders need fast, credible answers.

- Margins, cash flow, or costs have shifted unexpectedly
- We're debating root causes without clear evidence
- We need answers quickly to make a high-stakes decision
- We don't want another recurring report—just clarity
- Leadership confidence would improve with a clear explanation of what changed

If this feels like you:

You need **targeted, one-time analysis tied to a real decision**.

Typical solution: Ad Hoc Analysis

Step 3. Reliable Numbers Check (Refreshable Excel Workbooks)

When decisions depend on numbers you don't fully trust.

- We rely heavily on Excel, but results vary by version or owner
- Manual exports and rework are common
- Leadership meetings get stuck debating whose numbers are right
- We want reliable, repeatable analysis without buying new software
- Finance and operations need consistent views of the same data



If you checked 3 or more:

You don't need new tools—you need **better-connected, structured ones**.

Typical Solution: ERP-Connected Excel Workbooks

Step 4. Shared Visibility Check (Dashboards)

When alignment across leaders matters more than speed alone.

- Decisions require multiple departments to see the same picture
- We have metrics, but no shared operational narrative
- Meetings focus on explaining data instead of deciding
- Leader's track KPIs, but ownership and action aren't always clear
- We want fewer reports and more clarity

If this resonates:

You're ready for **decision-driven dashboards**, not generic BI.

Typical Solution: Power BI Dashboards

Step 5. Scale & Complexity Check (Data Foundation)

When growth makes ad hoc fixes unsustainable.

- Data lives across multiple systems (ERP, CRM, WMS, etc.)
- Reporting changes break existing logic
- We spend too much time rebuilding instead of improving analysis
- Leaders want confidence that decisions reflect the full business
- We're planning growth and don't want data to become a bottleneck

If you checked several:

You need a **durable analytics backbone**, not more reports.

Typical Solution: Data Lake & Analytics Foundation



Interpreting Your Results

- **Mostly Section 1–2:**
You need clarity first. Start small. Solve real decisions fast.
- **Mostly Section 3:**
Your data exists—but trust and structure are the problem.
- **Mostly Section 4:**
You need shared visibility to improve alignment and execution.
- **Mostly Section 5:**
You're ready to invest in scalability and long-term decision confidence.

Final Reality Check (Our Philosophy Applied)

- Can we clearly state *what decision this data supports*?
- Do we know *who will use it and how often*?
- Will it change behavior—or just add information?

If any answer is unclear, that's the signal to pause and rethink the approach.

