GET YOUR DATA HOUSE IN ORDER™

DATA HOUSE™

BUILD A FOUNDATION THAT DRIVES REAL IMPACT.

ASSESS

MEASURE

AUTOMATE

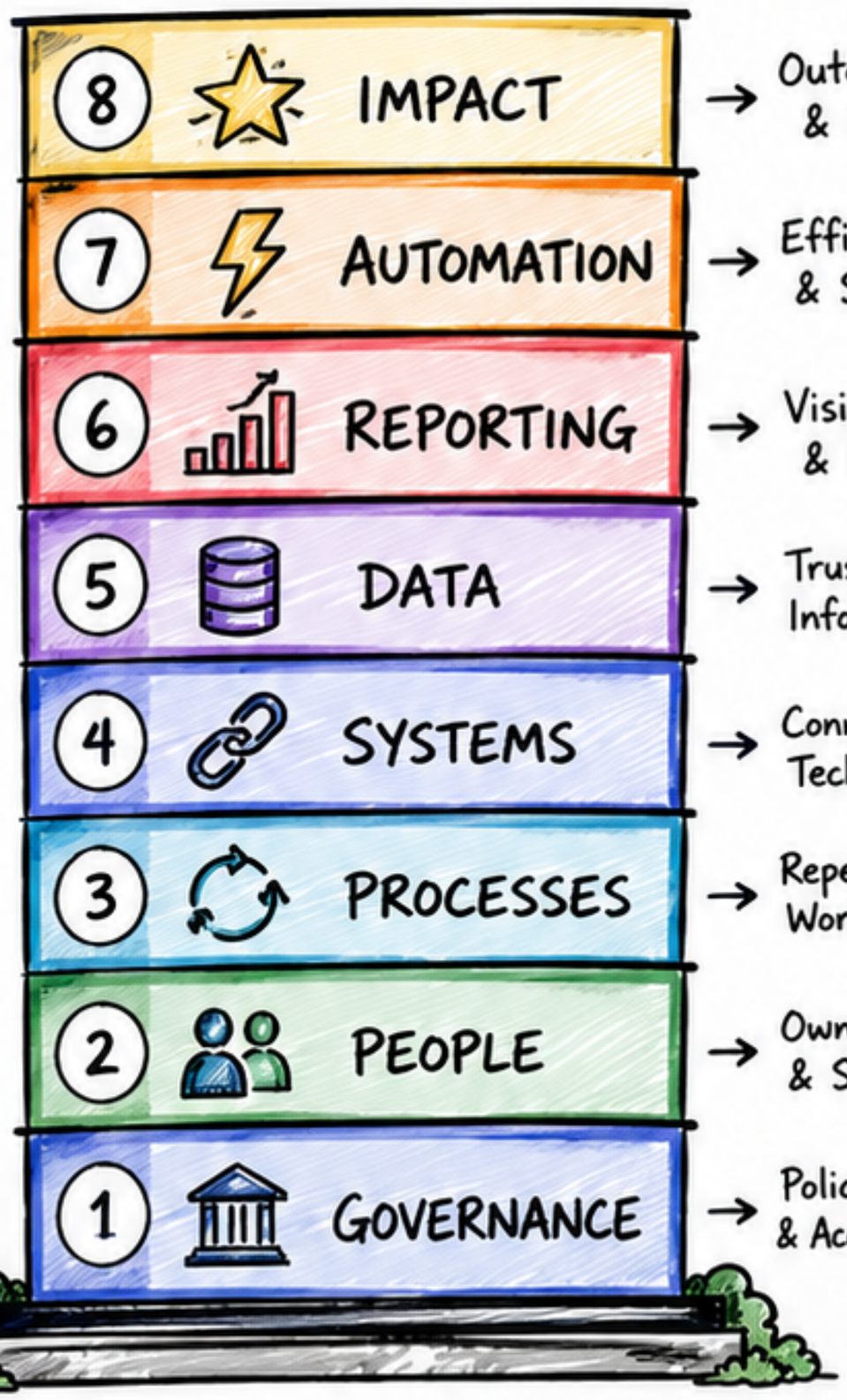
INSIGHTS

IMPACT

CHECKLIST & SCORECARD

Evaluate All 8 Floors of Your Data House™

- ☑ Assess Your Foundation
- ☑ Find Hidden Weaknesses
- ☑ Prioritize Quick Wins
- ☑ Build A 90-Day Roadmap



Better Data.
Better Decisions.
Stronger Outcomes.

YOUR ROADMAP TO A STRONGER, SMARTER, DATA-DRIVEN ORGANIZATION.

LET'S GET STARTED!

BY THE DATA GUYS™

WHAT IS A DATA HOUSE™?

Your Data House™ is the foundation that supports every report, dashboard, decision, and outcome.

WEAK FOUNDATION



- **Reports take weeks**
  Too slow to be useful.
- **Nobody trusts the numbers**
  Decisions are based on opinions.
- **Data lives in silos**
  Disconnected systems.
  Disorganized information.
- **No visibility**
  Blind spots everywhere.
- **Opportunities get missed**
  Can't see trends. Can't act fast.
- **Impact can't be proven**
  Hard to get funding. Hard to grow.

THE TRUTH:

You can't build intelligence on disorganized information.

A strong Data House™ creates clarity, confidence, and measurable results.

STRONG FOUNDATION



- **Real-time visibility**
  Timely data. Faster action.
- **One trusted source**
  Clean, accurate, consistent data.
- **Connected systems**
  Data flows automatically.
  Everyone works from the same truth.
- **Clear dashboards**
  Insights at a glance.
  KPIs drive decisions.
- **Opportunities identified**
  Spot trends. Act early. Grow faster.
- **Impact is measurable**
  Prove outcomes. Earn trust.
  Secure more resources.

EVERYTHING YOU BUILD DEPENDS ON YOUR FOUNDATION

Reports	Dashboards	Automation	AI & Analytics	Outcomes	Funding
Need trusted data	Need clean, connected data	Needs reliable systems	Need quality, structured data	Need clear measurement	Needs proven impact

WHY THIS MATTERS

- Strong foundations reduce risk
- Better data saves time and money
- Leaders make confident decisions
- Teams stop fighting about the numbers
- You create real, measurable impact

THIS CHECKLIST WILL HELP YOU:

- ✔ Assess all 8 floors of your Data House™
- ✔ Identify the cracks in your foundation
- ✔ Prioritize what to fix first
- ✔ Build a 90-day improvement plan

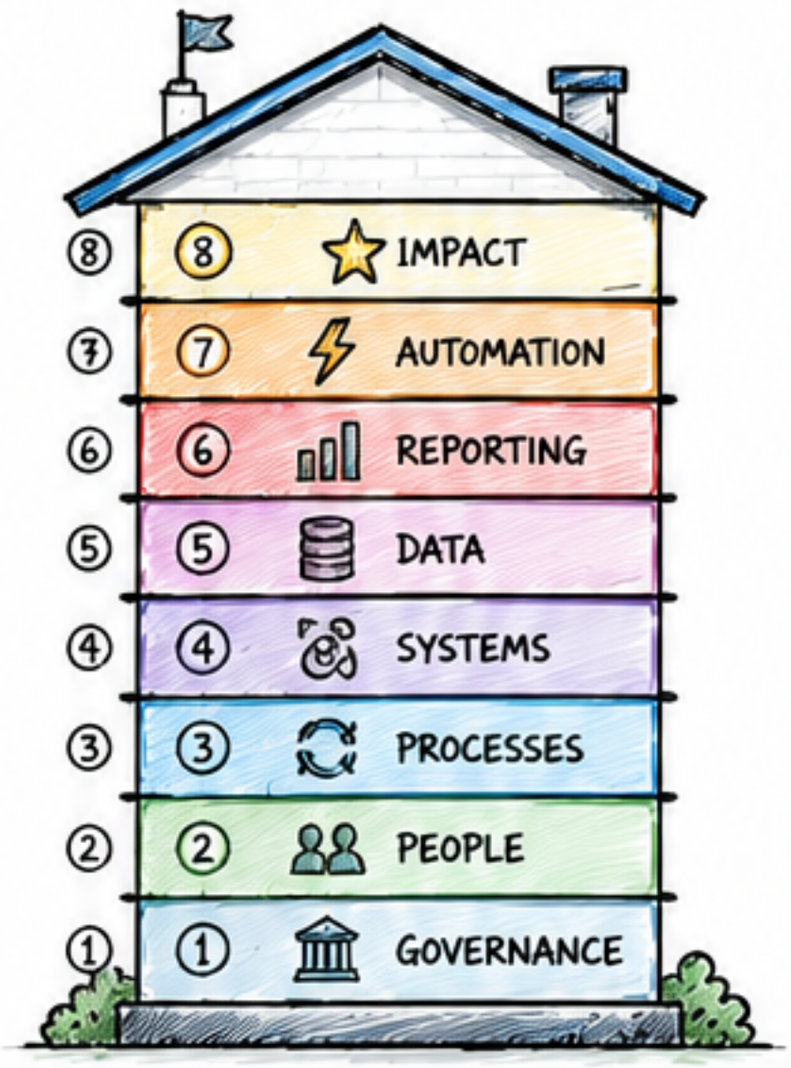
A strong Data House™ doesn't happen by accident. It happens by design.

HOW TO USE THIS ASSESSMENT

This checklist helps you assess the health of your Data House™ across 8 critical floors. Your scores will reveal what's strong, what's weak, and where to focus first.

1 RATE EACH FLOOR

Answer the questions for each floor and give yourself a score from 1 to 5 based on your current state.



2 USE THE SCORING GUIDE

Be honest about your current state. There are no right or wrong answers.

5 Fully Documented & Trusted
Best practice. Optimized and consistently followed.

4 Mostly Consistent
Strong foundation with minor gaps or inconsistencies.

3 Some Structure
Basic processes exist but not fully defined or reliable.

2 Informal
Ad-hoc efforts with limited documentation or ownership.

1 Not Started
No structure, process, or documentation.

3 CALCULATE YOUR SCORE

Add up your scores for all 8 floors for your total Data House Score.

YOUR SCORES

FLOOR 8	Impact	_____
FLOOR 7	Automation	_____
FLOOR 6	Reporting	_____
FLOOR 5	Data	_____
FLOOR 4	Systems	_____
FLOOR 3	Processes	_____
FLOOR 2	People	_____
FLOOR 1	Governance	_____

TOTAL SCORE _____ / 40
(0-40)

Tip:
Don't aim for perfection.
Aim for progress.
Small improvements create big impact.

4 UNDERSTAND YOUR RESULTS

Use your total score to understand the overall health of your Data House™.

0 - 15 CRITICAL FOUNDATION ISSUES



- High risk of bad data and poor decisions
- Reports are unreliable or slow
- Focus on Foundation floors (1-3) first

16 - 25 DEVELOPING



- Some structure exists but gaps are holding you back
- Inconsistent data and reporting
- Focus on Systems and Data (4-5)

26 - 34 STRONG



- Solid foundation with some optimization opportunities
- Good visibility but room to automate
- Focus on Reporting and Automation (6-7)

35 - 40 HIGH PERFORMING



- Great foundation and mature processes
- Optimize for impact and scale
- Focus on Impact and continoous improvement (8)

REMEMBER:

The goal isn't a perfect score.

It's a strong, data-driven organization that can measure what matters and drive better outcomes.

5 CREATE YOUR 90-DAY ACTION PLAN

Use the back of this checklist to capture your top priorities and build your first 90-day roadmap.



PRO TIP

Start where the pain is the greatest, but don't ignore your foundation.

You can't build a strong Data House on a cracked base.

Honest assessment today, stronger Data House tomorrow.



FLOOR 1
GOVERNANCE
(Who Owns The Data?)

THE FOUNDATION

Strong governance creates **trust**, **accountability**, and **consistency** across your organization.

WHY THIS MATTERS TO YOU

- ✓ Leaders trust reports.
- ✓ Staff stop arguing about numbers.
- ✓ Audit preparation is easier.
- ✓ AI tools and automations work better.
- ✓ New employees onboard faster.
- ✓ Decisions happen faster.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization **today**.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME STRUCTURE	MOSTLY CONSISTENT	DOCUMENTED & TRUSTED

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	Every important report, spreadsheet, database, or dashboard has a person responsible for keeping it accurate.	Example: Someone owns donor data, program outcomes, financial reporting, etc.	○	○	○	○	○
2	We have documented policies for how data is collected, used, stored, and protected.	Example: There are written guidelines for data quality, privacy, retention, and use.	○	○	○	○	○
3	Access and security are managed appropriately.	Example: • Payroll is restricted • Customer data is protected • Staff see only what they need	○	○	○	○	○
4	Different departments use the same definitions for key metrics (customers, participants, projects, revenue, impact, etc.).	Example: "Participant" means the same thing in all programs and reports.	○	○	○	○	○
5	Leaders use data in meetings and decisions instead of relying on assumptions or opinions.	Example: Leadership reviews dashboards monthly and uses them to make decisions.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- ★ Everyone knows who owns each dataset.
- ★ Policies are documented and followed.
- ★ Data is secure and access is appropriate.
- ★ Definitions and metrics are consistent.
- ★ Leaders trust the data and act on it.

COMMON SYMPTOMS OF WEAK GOVERNANCE

- ☒ Reports conflict across departments
- ☒ Nobody knows who owns the data
- ☒ Spreadsheets with no clear update process
- ☒ Different definitions for the same metrics
- ☒ Leaders don't trust the numbers

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT

Board report shows 500 participants.

Question: Do all programs define "participant" the same way?

CONSTRUCTION

Three project managers report labor costs differently.

Question: Are labor calculations standardized?

GOVERNMENT

Different departments use different resident counts.

Question: Are key metrics documented and consistent?

SMALL BUSINESS

Sales spreadsheet doesn't match accounting system.

Question: Who owns revenue reporting accuracy?

ECONOMIC DEV.

Investment totals vary by report.

Question: Is there a single definition for "investment"?

YOUR GOVERNANCE SCORE

__/25

SCORING GUIDE

0 - 12 = CRITICAL
13 - 17 = DEVELOPING
18 - 21 = STRONG
22 - 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0-12): Foundation is weak. High risk of bad data, bad decisions, and compliance issues.

DEVELOPING (13-17): Some structure exists but it's inconsistent and informal. Improvements needed.

STRONG (18-21): Most key governance practices are in place and working.

OPTIMIZED (22-25): Governance is embedded in operations and scales well.

IF YOU SCORED BELOW 18, START HERE (QUICK WINS) ★

Create a data owner list → Define 10 key business metrics → Document metric definitions → Review and set access permissions → Schedule monthly data review meetings → Create a simple governance policy

NEXT STEP

Move to Floor 2: People
(Who Uses The Data?)

★ → Strong governance is the **foundation** of a trusted, data-driven organization.

FLOOR 2
PEOPLE
(Who Uses The Data?)



People are the heart of your Data House.

OWNERSHIP & ACCOUNTABILITY

When people understand, own, and trust the data, your organization moves faster and makes better decisions.

WHY THIS MATTERS TO YOU

- Engaged people enter better data.
- Accountable teams take ownership.
- Everyone speaks the same data language.
- Less confusion. Less rework.
- Better data habits create better outcomes.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization today.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME STRUCTURE	MOSTLY CONSISTENT	DOCUMENTED & TRUSTED

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	People know who owns the data and what they are responsible for.	Example: Data owners are assigned and listed. Everyone knows who to contact for questions.	○	○	○	○	○
2	Staff understand how their work impacts reports and decisions.	Example: Frontline staff know how the data they enter affects the bigger picture.	○	○	○	○	○
3	Teams communicate about data regularly.	Example: Data questions are discussed. Updates and changes are shared across teams.	○	○	○	○	○
4	Data training and resources are available.	Example: New hires receive training. Refresher training happens regularly.	○	○	○	○	○
5	People follow data processes consistently.	Example: Everyone follows the same steps for entering, updating, and reporting data.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- People are empowered to use data.
- Ownership is clear at every level.
- Teams take pride in data quality.
- Data skills grow across the organization.
- Everyone trusts the information they see.

COMMON SYMPTOMS OF WEAK PEOPLE PRACTICES

- "I don't know who I should ask."
- High staff turnover creates data gaps.
- Reports rely on one or two people.
- No training = inconsistent data entry.
- People feel blamed when data is wrong.

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT
Volunteers enter participants differently depending on who trained them.
Question: Do all program staff use the same definition of "participant"?

CONSTRUCTION
Field teams track labor and equipment differently across projects.
Question: Does everyone follow the same process?

GOVERNMENT
Departments report metrics differently to leadership.
Question: Do teams understand how their data rolls up?

SMALL BUSINESS
Different staff use different spreadsheets or tracking methods.
Question: Is there one source of truth for key numbers?

ECONOMIC DEV.
Project managers track outcomes but don't communicate results.
Question: Do teams know how their data shows community impact?

YOUR PEOPLE SCORE

__/25

SCORING GUIDE

0 – 12 = CRITICAL
13 – 17 = DEVELOPING
18 – 21 = STRONG
22 – 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0-12): People are not aligned or equipped for data success.

DEVELOPING (13-17): Some awareness exists but skills, ownership, or consistency are missing.

STRONG (18-21): Teams understand their roles and support data quality.

OPTIMIZED (22-25): Data culture is strong, and learning never stops.

IF YOU SCORED BELOW 18, START HERE (QUICK WINS)

Create a data owner list → Share roles & responsibilities → Provide basic data training → Hold a monthly data huddle → Document simple processes → Recognize good data habits

NEXT STEP

Move to Floor 3: Processes (How Work Gets Done)

Great people practices lead to trusted data, better decisions, and stronger impact.



Good processes turn chaos into consistency. Consistency creates trust.

FLOOR 3
PROCESSES
(How Work Gets Done)

REPEATABLE & RELIABLE WORKFLOWS

Documented, consistent processes ensure data is collected, managed, and reported accurately every time.

WHY THIS MATTERS TO YOU

- Saves hours of rework every week.
- Reduces errors and missing data.
- Makes reporting predictable and on-time.
- Easier onboarding for new staff.
- Builds a scalable data foundation as you grow.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization today.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME STRUCTURE	MOSTLY CONSISTENT	DOCUMENTED & TRUSTED

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	Our key data processes are documented in simple steps.	Example: We have written steps for how we collect, update, and report important data.	○	○	○	○	○
2	Data is collected the same way, every time.	Example: Intake forms, surveys, and data entry follow the same process across all programs or projects.	○	○	○	○	○
3	We review data for accuracy before it is used.	Example: We have checks for duplicates, missing fields, or unusual values before reports are created.	○	○	○	○	○
4	Every process has an owner who is accountable for it.	Example: There is a person responsible for making sure the process happens and gets better.	○	○	○	○	○
5	We improve our processes based on feedback and results.	Example: We regularly ask, "What can we do better?" and make changes that stick.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- Processes are written, simple, and easy to follow.
- Data flows from start to finish without confusion.
- Quality checks catch issues early.
- Everyone knows their role in the process.
- Processes are reviewed and improved regularly.

COMMON SYMPTOMS OF WEAK PROCESSES

- Different people do the same task different ways.
- Important steps are missed or forgotten.
- Data is incomplete or inaccurate.
- Reports are late or always changing.
- No one knows who is responsible.

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT

Different programs track participants in different ways.

Question: Do all programs collect the same core information?

CONSTRUCTION

Projects use different processes for daily reports and change orders.

Question: Are your project reporting processes consistent?

GOVERNMENT

Departments follow different steps for permits or inspections.

Question: Are there standard workflows across departments?

SMALL BUSINESS

Sales, invoicing, and customer info are handled in different ways.

Question: Are your day-to-day processes documented?

ECONOMIC DEV.

Projects are tracked differently, making it hard to report impact.

Question: Is there a standard process for tracking outcomes?

YOUR PROCESSES SCORE

__/25

SCORING GUIDE

0 – 12 = CRITICAL
13 – 17 = DEVELOPING
18 – 21 = STRONG
22 – 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0–12): Processes are chaotic and create errors and delays.

DEVELOPING (13–17): Some processes exist but are inconsistent or not well documented.

STRONG (18–21): Most key processes are documented and followed consistently.

OPTIMIZED (22–25): Processes are efficient, measured, and continuously improved.

IF YOU SCORED BELOW 18, START HERE (QUICK WINS)

List your top 5 data processes → Document the steps (keep it simple) → Identify the owner for each process → Add a basic quality check at key points → Review and improve every month

NEXT STEP

Move to Floor 4: Systems (How Tools Connect)

PRO TIP: Great processes don't have to be perfect. They just need to be clear, consistent, and followed. → Small improvements today = big time savings tomorrow.

FLOOR 4
SYSTEMS
(How Tools Connect)



Connected systems eliminate manual work and data silos.

CONNECTED & RELIABLE TECHNOLOGY

Your systems should work together, share data seamlessly, and support your mission—not slow it down.

WHY THIS MATTERS TO YOU

- Less manual work and fewer errors.
- Real-time data across the organization.
- Faster reporting and insights.
- Scales as you grow.
- Better experience for staff and customers.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization today.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME STRUCTURE	MOSTLY CONNECTED	INTEGRATED & RELIABLE

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	Our core systems (e.g., database, accounting, CRM, project tools) are integrated or connected.	Example: Data flows between systems without retyping or exporting and importing.	○	○	○	○	○
2	We have a single source of truth for key data.	Example: Customer, donor, project, or financial data lives in one main system—not in multiple places.	○	○	○	○	○
3	Our systems are reliable and perform well.	Example: Systems are up when we need them, load quickly, and rarely experience downtime.	○	○	○	○	○
4	Data is secure across all systems and connections.	Example: We use permissions, encryption, and backups to protect our data and meet compliance needs.	○	○	○	○	○
5	We regularly review and improve our system connections and workflows.	Example: We look for better ways to automate, integrate, and reduce manual work.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- Systems "talk" to each other automatically.
- You don't re-enter data.
- Reports pull from live, trusted data.
- Staff can find what they need without IT help.
- Systems support your goals and scale with you.

COMMON SYMPTOMS OF WEAK SYSTEMS

- Data lives in too many places.
- We export/import data manually.
- Reports take too long or contain errors.
- Systems are outdated or don't meet our needs.
- We buy tools that don't work together.

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT

Donor data in one system, program data in another, and they don't match.

Question: Do systems share data or live in silos?

CONSTRUCTION

Estimating, project management, and accounting tools aren't connected.

Question: Do we re-enter project data too many times?

GOVERNMENT

Permitting, finance, and work orders don't share data automatically.

Question: Do residents have to give the same info more than once?

SMALL BUSINESS

Sales, inventory, and accounting systems don't sync.

Question: Is our financial data always up to date?

ECONOMIC DEV.

CRM, event, and marketing tools don't connect.

Question: Can we track the full journey from outreach to result?

YOUR SYSTEMS SCORE

__/25

SCORING GUIDE

0 – 12 = CRITICAL
13 – 17 = DEVELOPING
18 – 21 = STRONG
22 – 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0–12): Disconnected systems create errors, delays, and frustration.

DEVELOPING (13–17): Some systems connect, but gaps and manual work remain.

STRONG (18–21): Key systems are integrated and reliable most of the time.

OPTIMIZED (22–25): Systems are fully connected, automated, and scalable.

IF YOU SCORED BELOW 18, START HERE (QUICK WINS)

Map your core systems and data flows → Identify duplicate data and manual hand-offs → Connect 1–2 key systems or automate one data flow → Create a single source of truth for one important dataset → Establish regular backups and system health checks

NEXT STEP

Move to Floor 5: Data (Can You Trust It?)

PRO TIP: Great systems are like roads connecting your data. → The better they connect, the faster you reach your destination.

FLOOR 5
DATA
(Can You Trust It?)



Good data is accurate, complete, and up-to-date. It's reliable, clear, and ready to use.

ACCURATE • CONSISTENT • COMPLETE

Trusted data is the fuel for good decisions, strong reports, and real impact.

WHY THIS MATTERS TO YOU

- You can trust your numbers.
- Less time fixing data, more time using it.
- Better reporting and stronger stories.
- Confident decisions backed by facts.
- AI and automation only work with good data.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization today.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME STRUCTURE	MOSTLY RELIABLE	HIGHLY TRUSTED

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	Our data is accurate and up-to-date.	Example: Records are reviewed and updated regularly. We fix errors when found.	○	○	○	○	○
2	Our data is complete. We capture all the key information we need.	Example: Forms collect required fields. We don't rely on guesswork or workarounds.	○	○	○	○	○
3	Our data is consistent across systems and teams.	Example: The same customer or project doesn't have different names or numbers in different places.	○	○	○	○	○
4	We have data quality standards and follow them.	Example: We have rules for formats, definitions, duplicates, and validation.	○	○	○	○	○
5	Someone is responsible for data quality.	Example: A person or team monitors data quality and makes improvements.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- Data is correct and reliable.
- Reports match across systems.
- Missing data is rare.
- Everyone knows the rules for data entry.
- Data issues are found early and fixed fast.

COMMON SYMPTOMS OF WEAK DATA

- Numbers don't add up.
- Too much missing or outdated data.
- Different reports show different results.
- Cleaning data takes longer than analyzing it.
- No one is sure which number is right.

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT
Donor names are duplicated or contact info is outdated.
Question: Can we trust our donor list today?

CONSTRUCTION
Project costs and change orders are entered differently by each person.
Question: Do our project numbers match the books?

GOVERNMENT
Address data is inconsistent across departments and systems.
Question: Are we serving the right residents?

SMALL BUSINESS
Customer info lives in spreadsheets, email, and accounting separately.
Question: Do we have one source of truth for customers?

ECONOMIC DEV.
Company data is missing key fields like jobs, revenue, or industry.
Question: Can we report accurate impact?

YOUR DATA SCORE

__/25

SCORING GUIDE

0 - 12 = CRITICAL
13 - 17 = DEVELOPING
18 - 21 = STRONG
22 - 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0-12): Data is unreliable and risky.

DEVELOPING (13-17): Data quality issues cause delays and rework.

STRONG (18-21): Data is mostly reliable and supports decisions.

OPTIMIZED (22-25): Data quality is consistent and trusted across the organization.

IF YOU SCORED BELOW 18, START HERE (QUICK WINS)

Identify your top 3 data problems → Set simple data standards & rules → Clean and fix high-impact data → Assign data owners by area → Schedule monthly data quality checks → Track progress and improve

NEXT STEP

Move to Floor 6: Reporting (Can You See What's Happening?)

PRO TIP: Better data = less firefighting, more confidence, and a stronger mission impact.



Great reports tell the right story to the right people at the right time.

FLOOR 6
REPORTING
(Can You See What's Happening?)

CLEAR • USEFUL • ACTIONABLE

Good reporting turns data into insights that drive action, alignment, and results.

WHY THIS MATTERS TO YOU

- Leaders see what matters most.
- Teams make faster, better decisions.
- Everyone stays aligned and informed.
- You prove impact with confidence.
- AI and automation shine with good reports.
- You stop wasting time building reports no one uses.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization today.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME STRUCTURE	MOSTLY EFFECTIVE	HIGHLY EFFECTIVE

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	Our reports focus on the most important metrics and questions.	Example: Board reports highlight impact, financial health, and key trends—not every detail.	○	○	○	○	○
2	Reports are easy to understand and act on.	Clear charts, simple language, and a recommended next step in every report.	○	○	○	○	○
3	Reports are delivered to the right people on time.	Weekly ops dashboard for managers. Monthly summary for leadership. On time.	○	○	○	○	○
4	We use dashboards and visuals that make insights quick to see.	Dashboards show KPIs, trends, comparisons, and alerts at a glance.	○	○	○	○	○
5	We use reports to drive action and improve results.	Leaders discuss reports in meetings and adjust plans based on what they see.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- Reports answer key questions.
- Visuals tell the story quickly.
- Everyone knows where to find what they need.
- Reports lead to decisions and follow-up actions.
- You can prove outcomes and share impact.

COMMON SYMPTOMS OF WEAK REPORTING

- Too many reports, not enough clarity.
- Reports are outdated or delayed.
- No one reads or uses the reports.
- Different versions of the truth.
- Hard to find the data you need.

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT
Board deck has too much detail and no clear takeaways.
Question: Does your board know the top 3 things you need them to know?

CONSTRUCTION
Project reports are inconsistent and hard to compare.
Question: Can you see cost, schedule, and risk in one view?

GOVERNMENT
Citizens can't find department metrics or track progress.
Question: Are your reports transparent and easy for the public to access?

SMALL BUSINESS
Reports are buried in spreadsheets and take hours to build.
Question: Could you run your key reports in less than 30 minutes?

ECONOMIC DEV.
Hard to show economic impact and program results.
Question: Can you show outcomes that matter to investors and stakeholders?

YOUR REPORTING SCORE

__/25

SCORING GUIDE

0 - 12 = CRITICAL
13 - 17 = DEVELOPING
18 - 21 = STRONG
22 - 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0-12): Reports are confusing or not used.
DEVELOPING (13-17): Some useful reports exist but need consistency and clarity.
STRONG (18-21): Reports are clear, timely, and used for decisions.
OPTIMIZED (22-25): Reporting drives action, alignment, and measurable impact.

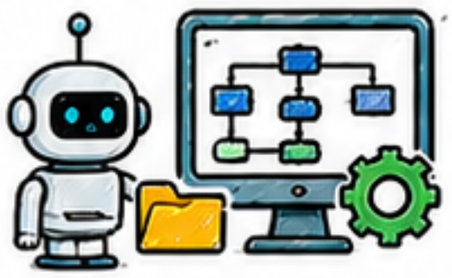
IF YOU SCORED BELOW 18, START HERE (QUICK WINS)

Identify your top 5 key questions → Remove or reduce reports no one uses → Create 1 simple dashboard → Share with the right people → Set a regular reporting cadence → Review and improve based on feedback

NEXT STEP

Move to Floor 7: Automation (What Can Be Done Automatically?)

PRO TIP: The best reports don't just show numbers—they spark conversations and drive action.



Automation is like having a reliable assistant that works 24/7 without errors.

FLOOR 7
AUTOMATION
(What Can Run Itself?)

REDUCE MANUAL WORK • SAVE TIME • LOWER ERRORS

Automation lets your team focus on high-value work instead of repetitive, manual tasks.

WHY THIS MATTERS TO YOU

- Saves hours every week.
- Reduces human errors.
- Speeds up reporting and responses.
- Helps your team do more with less.
- AI and advanced tools depend on good automation.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization today.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME AUTOMATION	MOSTLY AUTOMATED	FULLY AUTOMATED

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	We automate repetitive and rule-based tasks.	Example: Data entry, report generation, reminder emails, data transfers, or approvals.	○	○	○	○	○
2	Systems integrate and share data automatically.	Example: CRM updates accounting. Form submissions update databases. No re-keying.	○	○	○	○	○
3	Our automated processes run on a schedule.	Example: Reports run every Monday. Data syncs nightly. Alerts sent weekly.	○	○	○	○	○
4	We use alerts and notifications to catch issues early.	Example: Low inventory alert. Missing data alert. Overdue payment reminder.	○	○	○	○	○
5	We use AI or smart tools to improve efficiency.	Example: AI summarizes notes. Chatbot answers FAQs. AI predicts trends.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- Manual work is minimized.
- Processes run automatically.
- Real-time alerts prevent problems.
- Team has time for important work.
- Automation scales as you grow.

COMMON SYMPTOMS OF WEAK AUTOMATION

- Too much manual data entry.
- Staff copy/paste between systems.
- Reports take too long to create.
- Tasks depend on one person.
- We miss things or make mistakes.
- No alerts until a problem is big.

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT

Donor receipts are entered manually. Thank-you emails are not automated.

Question: Can we automate recurring communications?

CONSTRUCTION

Daily reports are hand-collected. Schedules change but no one is notified automatically.

Question: Can daily logs sync automatically?

GOVERNMENT

Permit applications require manual approvals at every step.

Question: Can we automate routing and approvals?

SMALL BUSINESS

Invoices are sent manually. Follow-ups take too long.

Question: Can invoices, reminders, and payments be automated?

ECONOMIC DEV.

Leads are tracked in spreadsheets. No automated follow-up or reporting.

Question: Can we automate lead nurturing and reports?

YOUR AUTOMATION SCORE

__/25

SCORING GUIDE

0 – 12 = CRITICAL
13 – 17 = DEVELOPING
18 – 21 = STRONG
22 – 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0–12): Work is manual and error-prone.

DEVELOPING (13–17): Some automation exists but is inconsistent.

STRONG (18–21): Key processes are automated and saved time.

OPTIMIZED (22–25): Automation is strategic, integrated, and continuously improving.

IF YOU SCORED BELOW 18, START HERE (QUICK WINS)

List 5 repetitive tasks → Map the process (start to finish) → Find a tool or feature that can automate it → Test on a small scale → Measure time saved & errors reduced → Expand what works

NEXT STEP

Move to Floor 8: Impact (Can You Prove Results?)

PRO TIP: Start small, automate one thing, and build momentum. → Small wins today = big transformation tomorrow.

FLOOR 8
IMPACT
(Can You Prove Results?)



Impact is what changes lives, strengthens communities, and grows your organization.

MEANINGFUL • MEASURABLE • MISSION-DRIVEN

The ultimate goal of data is to create real impact. You can prove it, improve it, and share it with confidence.

WHY THIS MATTERS TO YOU

- You can prove your value and results.
- You attract more funding and support.
- You make better decisions for the future.
- You improve programs and outcomes.
- You build trust with stakeholders.
- You create a culture of accountability and learning.

ASSESS YOUR CURRENT STATE

Rate how well each statement describes your organization today.

HOW WELL DOES THIS DESCRIBE YOU?

1	2	3	4	5
NOT STARTED	INFORMAL	SOME STRUCTURE	MOSTLY MEASURABLE	FULLY PROVEN

#	STATEMENT (Plain Language)	EXAMPLE	1	2	3	4	5
1	We have clear goals and measure what matters most.	Example: We track outcomes tied to our mission and top priorities, not just activity.	○	○	○	○	○
2	We can show our results with data and stories.	Example: We combine numbers with real stories that show the change we create.	○	○	○	○	○
3	We track outcomes over time to see what's improving.	Example: We compare results month over month, quarter over quarter, or year over year.	○	○	○	○	○
4	We use impact data to make decisions and improve.	We review results, decide what to change, and act based on what we learn.	○	○	○	○	○
5	We communicate our impact clearly to stakeholders.	Our reports, dashboards, and stories are easy to understand and inspiring.	○	○	○	○	○

WHAT GOOD LOOKS LIKE

- Impact is tied to your mission and goals.
- You can measure outcomes, not just activities.
- Reports show real change and value.
- Everyone understands how their work contributes.
- Data drives learning, not just reporting.

COMMON SYMPTOMS OF WEAK IMPACT

- We track activity, not outcomes.
- We don't know what to measure.
- Data is not connected to goals.
- Reports are boring or too complex.
- We can't prove our impact.

HOW THIS SHOWS UP IN YOUR WORLD (EXAMPLES)

NONPROFIT

Grant reports focus on outputs, not outcomes.

Question: Do we know the real change we create?

CONSTRUCTION

Projects finish on time, but we don't measure client satisfaction or long-term results.

Question: What is the impact of our work?

GOVERNMENT

We publish data, but citizens don't see how it improves their community.

Question: Do residents feel the difference?

SMALL BUSINESS

We track sales, but don't measure customer retention or lifetime value.

Question: Are we building lasting value?

ECONOMIC DEV.

We count jobs, but don't track quality jobs or wage growth.

Question: Are we improving lives and opportunity?

YOUR IMPACT SCORE

__/25

SCORING GUIDE

0 - 12 = CRITICAL
13 - 17 = DEVELOPING
18 - 21 = STRONG
22 - 25 = OPTIMIZED

INTERPRETATION

CRITICAL (0–12): We can't prove our impact or results.

DEVELOPING (13–17): We measure some things but not what matters most.

STRONG (18–21): We track meaningful outcomes and see improvement.

OPTIMIZED (22–25): We prove our impact and use it to drive growth.

IF YOU SCORED BELOW 18, START HERE (QUICK WINS)

Identify 1–3 key outcomes → Define how you'll measure each one → Collect and report results monthly → Use results to improve programs or services → Share results with your stakeholders → Repeat and keep getting better

NEXT STEP

Move to your overall Assessment Summary on the next page (Put It All Together!).

PRO TIP: Impact isn't a report. It's the change you create and the story you tell with confidence. → Prove it. Improve it. Inspire others.



You've completed the Data Maturity Assessment!

Now let's see where you stand and what to do next.

FINAL SCORE & NEXT STEPS

KNOW YOUR MATURITY. CHOOSE YOUR PATH. TAKE ACTION.

Great data doesn't happen by accident.
It happens by design, focus, and a next step.

WHY THIS MATTERS

- Your score shows your current reality.
- It helps you focus on what matters most.
- Small steps lead to big transformation.
- Every organization can improve.
- You don't have to do everything at once.
- Momentum today. Results tomorrow.

YOUR MATURITY SCORES

Add up your scores for each floor (max 25 points per floor).

FLOOR	FOCUS AREA	WHAT IT MEASURES	YOUR SCORE (0–25)	MATURITY LEVEL
1	Governance Who owns the data?	Clear ownership, rules, policies, and accountability.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized
2	People Who uses the data?	Skills, roles, adoption, training, and culture.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized
3	Processes How work gets done?	Documented workflows, standards, and efficiency.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized
4	Systems How tools connect?	Integrated systems, reliable tools, and connections.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized
5	Data Can you trust it?	Accuracy, consistency, quality, and integrity.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized
6	Reporting Can you see what's happening?	Clear, useful, timely reports and dashboards.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized
7	Automation What can run itself?	Automated tasks, alerts, and intelligent tools.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized
8	Impact Can you prove results?	Outcomes, value, and continuous improvement.	__/25	☐ Critical ☐ Developing ☐ Strong ☐ Optimized

TOTAL SCORE (OUT OF 200) __/200 ← Add all 8 floors to get your total score!

YOUR OVERALL MATURITY SCORE

__/200

MATURITY LEVEL (OVERALL)

- ☐ CRITICAL (0–79)
- ☐ DEVELOPING (80–119)
- ☐ STRONG (120–159)
- ☐ OPTIMIZED (160–200)

WHAT YOUR SCORE MEANS

CRITICAL (0–79): Significant gaps. High risk of errors, inefficiency, and missed opportunities.

DEVELOPING (80–119): Progress is happening, but inconsistency and gaps limit performance.

STRONG (120–159): Solid foundation with good processes and results. Keep improving.

OPTIMIZED (160–200): Data is a strategic advantage. You are leading the way!



WHERE SHOULD YOU FOCUS FIRST?

Look at your 8 floor scores above. Your lowest scores = your biggest opportunities.

1	2	3	4	5	6	7	8
Governance	People	Processes	Systems	Data	Reporting	Automation	Impact
Who owns the data?	Who uses the data?	How work gets done?	How tools connect?	Can you trust it?	Can you see what's happening?	What can run itself?	Can you prove results?
__/25	__/25	__/25	__/25	__/25	__/25	__/25	__/25

TIP: Focus on 1–2 floors at a time. Small wins build momentum!

YOUR NEXT 3 ACTIONS (START THIS WEEK!)

1. _____
   Why this matters: _____
2. _____
   Why this matters: _____
3. _____
   Why this matters: _____

Pick 3 things you can do in the next 7 days.
Done is better than perfect!

NEED HELP TAKING THE NEXT STEP?

We help organizations like yours turn data into clarity, efficiency, and impact.

- Strategy & Roadmaps • Process Improvement • Data & Reporting
- Automation • Training • AI Enablement

Visit TheDataGuys.com | Let's build your data advantage.

MY NOTES & IDEAS

YOU'VE TAKEN THE FIRST STEP!

Awareness creates opportunity.
Action creates change.
You've got this!

Keep learning. Keep improving.
Keep making an impact.



DATA ISN'T JUST ABOUT NUMBERS. IT'S ABOUT PEOPLE, PURPOSE, AND A BETTER FUTURE. → THANK YOU FOR INVESTING IN YOUR DATA MATURITY!

FLOOR 9

ACTION PLAN

(Turn Insight Into Action!)



Insights are powerful, but action is what creates real impact. A plan keeps you focused and accountable.

PLAN IT • OWN IT • DO IT • MEASURE IT • IMPROVE IT

A great plan turns insights into results.
Take intentional action and create lasting change.

WHY THIS MATTERS TO YOU

- Plans turn ideas into results.
- Clear owners and deadlines drive action.
- Measuring progress keeps you on track.
- You adapt and improve as you go.
- Consistent action builds trust and value.
- Small steps every day create big changes over time.

BUILD YOUR ACTION PLAN

Use your top 3 opportunities from your lowest scores.

STEP	WHAT WILL YOU DO?	WHY DOES IT MATTER?	OWNER	DEADLINE	SUCCESS MEASURE	CHECK
1 Opportunity (From your lowest scores)					How will we know it's successful?	☐
2 Opportunity (From your lowest scores)					How will we know it's successful?	☐
3 Opportunity (From your lowest scores)					How will we know it's successful?	☐

ACTION PLAN TIPS

BE SPECIFIC
Define exactly what you will do.

KEEP IT SMALL
Start with one or two high-impact actions.

ASSIGN OWNERSHIP
Everyone should know who is responsible.

SET DEADLINES
Pick realistic dates and stick to them.

MEASURE PROGRESS
Choose simple metrics that show progress.

REVIEW & ADAPT
Check in regularly and adjust your plan.

BREAK IT DOWN: TURN YOUR ACTIONS INTO STEPS



1 Action
KEY STEPS (What are the 2–3 main steps to complete this action?)
-
-

2 Action
KEY STEPS (What are the 2–3 main steps to complete this action?)
-
-
-

3 Action
KEY STEPS (What are the 2–3 main steps to complete this action?)
-
-
-

SUCCESS CHECKLIST

- ☐ We focused on the right priorities.
- ☐ Our plan is clear and realistic.
- ☐ We have the right people involved.
- ☐ We will track progress regularly.
- ☐ We will celebrate wins and learn from setbacks.

REMEMBER:
Progress > Perfection.
Take action, learn, and keep moving forward!



OVERCOMING COMMON ROADBLOCKS

ROADBLOCK	WHY IT HAPPENS	WHAT YOU CAN DO
No time	Busy schedules and competing demands.	Block time on the calendar. Start small. Protect the time.
Unclear priorities	Too many things seem important.	Focus on the few that drive the most impact.
Lack of buy-in	People don't see the value.	Communicate the why. Involve others early.
Not enough data	Data is missing or hard to find.	Use what you have. Improve data step by step.
Hard to sustain	We start strong but fade out.	Build habits. Track progress. Celebrate wins.

PROGRESS TRACKER

WEEK	WHAT DID WE DO?	% COMPLETE	NOTES / WINS / LESSONS
Week 1		____%	
Week 2		____%	
Week 3		____%	
Week 4		____%	
Week 5		____%	
Week 6		____%	

DAILY ACTION REMINDER

1% better every day = 37x better in a year.

Small steps. Big impact. You've got this!



ACCOUNTABILITY PARTNER

Share your plan with someone who will check in with you and help you stay on track.

Partner's Name: _____

Check-in Date: _____

NEXT UP!

You're almost there!

Next is Floor 10: Celebrate & Keep Improving (Sustaining Success for the Long Run)



ACTION IS THE BRIDGE BETWEEN INSIGHT AND IMPACT. → MAKE THE PLAN. TAKE THE ACTION. SEE THE CHANGE.



The journey doesn't end here. Sustainable success comes from habits, culture, and continuous improvement.

☆ FINAL PAGE ☆

SUSTAIN & SUCCEED

(Make It Last!)

REFLECT • REINFORCE • GROW • REPEAT

Keep the momentum. Build the habit. Create a data-driven culture that lasts.

WHY THIS MATTERS TO YOU

- ☑ Consistency creates lasting impact.
- ☑ Good habits make great results repeatable.
- ☑ A strong culture attracts and keeps talent.
- ☑ You become a leader people trust.
- ☑ Continuous improvement keeps you ahead.
- ☑ You build an organization that thrives!

MAKE IT A HABIT

Small, consistent habits lead to big, lasting results.

	HABIT	HOW TO MAKE IT STICK
1	Review regularly	• Set a weekly time to review key reports. • Put it on the calendar and protect the time.
2	Share consistently	• Share insights with the right people. • Keep others informed and involved.
3	Act on insights	• Turn insights into decisions and actions. • Track what you change and why.
4	Measure what matters	• Focus on a few key metrics. • Avoid tracking just for the sake of it.
5	Keep it simple	• Use clear visuals and simple language. • Make reports easy to read and understand.
6	Improve always	• Ask: What can we do better? • Test, learn, and keep improving.
7	Celebrate wins	• Recognize progress and success. • Celebrate small wins along the way!

SUSTAINABLE SUCCESS FORMULA

CLEAR GOALS
Know where you're going.

+

GOOD DATA
Build trust in your data.

+

SMART ACTIONS
Make data-backed decisions.

+

CONSISTENT HABITS
Do it regularly.

+

CONTINUOUS IMPROVEMENT
Keep learning and adapting.

=

LASTING IMPACT
Better results. Stronger future.

KEEP LEARNING & GROWING

- ★ **Stay curious** — Always ask questions.
- ★ **Keep improving your skills** — Learn, practice, teach.
- ★ **Learn from others** — Share and get ideas.
- ★ **Stay updated** — Follow best practices and new tools.
- ★ **Be open to change** — Adapt and grow.

YOUR 30-DAY ACTION PLAN

WEEK	FOCUS	KEY ACTIONS	I WILL DO IT (YES/NO)	NOTES / RESULTS
Week 1	Reset & Review	• Review key reports and dashboards • Identify top 3 priorities	☐	
Week 2	Improve & Act	• Take action on priorities • Communicate insights and plan	☐	
Week 3	Optimize & Measure	• Track progress and measure results • Adjust and remove what doesn't work	☐	
Week 4	Standardize & Share	• Document what works • Share success and celebrate wins	☐	

TIP: Review your plan at the end of each week. Adjust as needed. Keep going!

REFLECTION & COMMITMENT

What have I learned on this journey?

_____

_____

_____

What will I continue doing?

_____

_____

_____

What will I do better?

_____

_____

_____

I commit to making data a strength in my organization.

Signature: _____ Date: _____

QUICK REFERENCE: The 10 Essentials

1. Ask the right questions.
2. Use trusted, accurate data.
3. Make it clear and simple.
4. Visualize to tell the story.
5. Deliver to the right people.
6. Drive action and decisions.
7. Automate and save time.
8. Measure impact and results.
9. Plan your actions.
10. Sustain and keep improving.

REMEMBER...

- ☑ Data is a tool.
- ☑ People make the impact.
- ☑ Insights without action = wasted opportunity.
- ☑ Action without follow-through = no change.
- ☑ Small steps today = big results tomorrow.

You've got this!

YOU DID IT!

You've completed the 14-floor journey to becoming a Data-Savvy Leader!

Lead with data.
Inspire with impact.
The best is yet to come!

★ The data journey never ends, but every step makes you a better leader. → Keep learning. Keep leading. Keep making it count.