



Women in Data

Championing a data culture byte by byte

Alexa Sundberg with Erin Taylor and friends

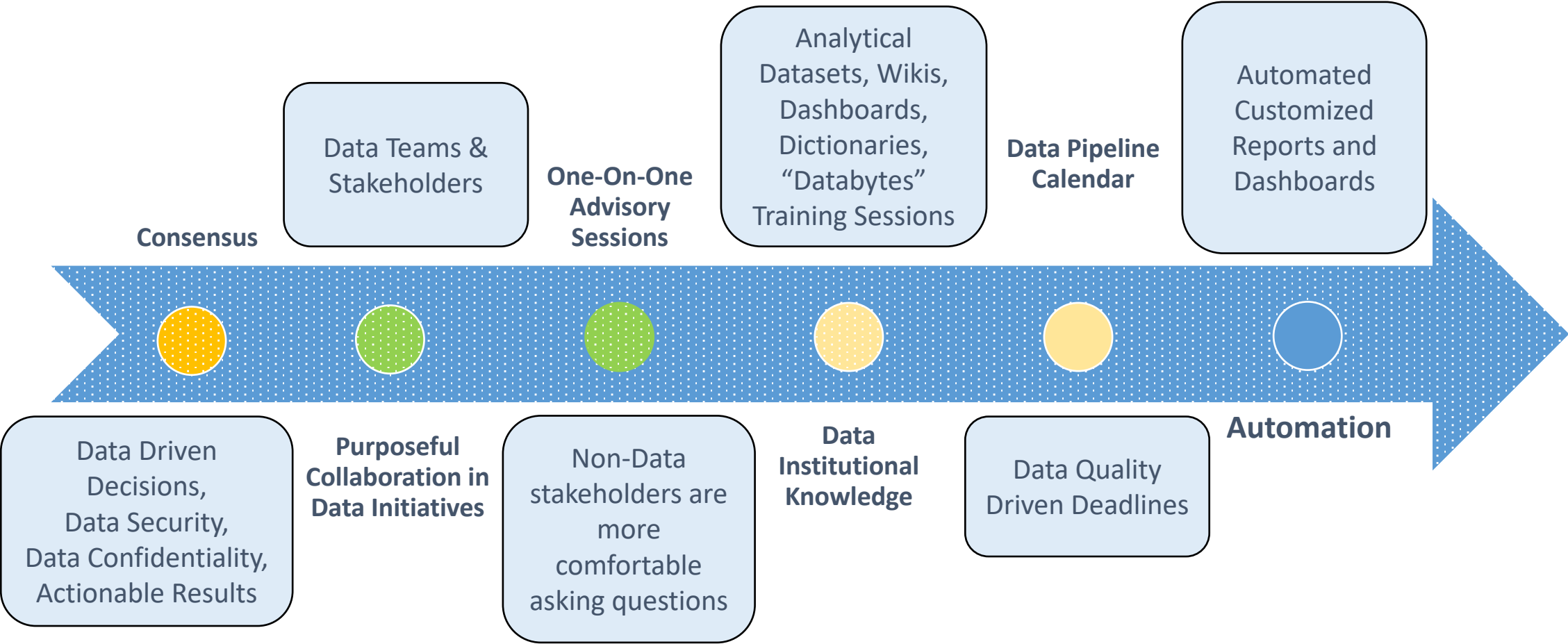
GUNDERSON DIRECT



Our Company, Data Source Agnostic

Approach to Creating a Data Driven Culture

Work-in-Progress



Example Collaboration – Production

- End Use of Data for Direct Mail
- Project Checklist includes Data Items
- Proofs – Visual Inspection
- Adjustments together

PROJECT CHECKLIST

7450-0519

7450-0519 EC July DM Campaign 2019

Creative only?

ezCater

New client?

Mike Izo

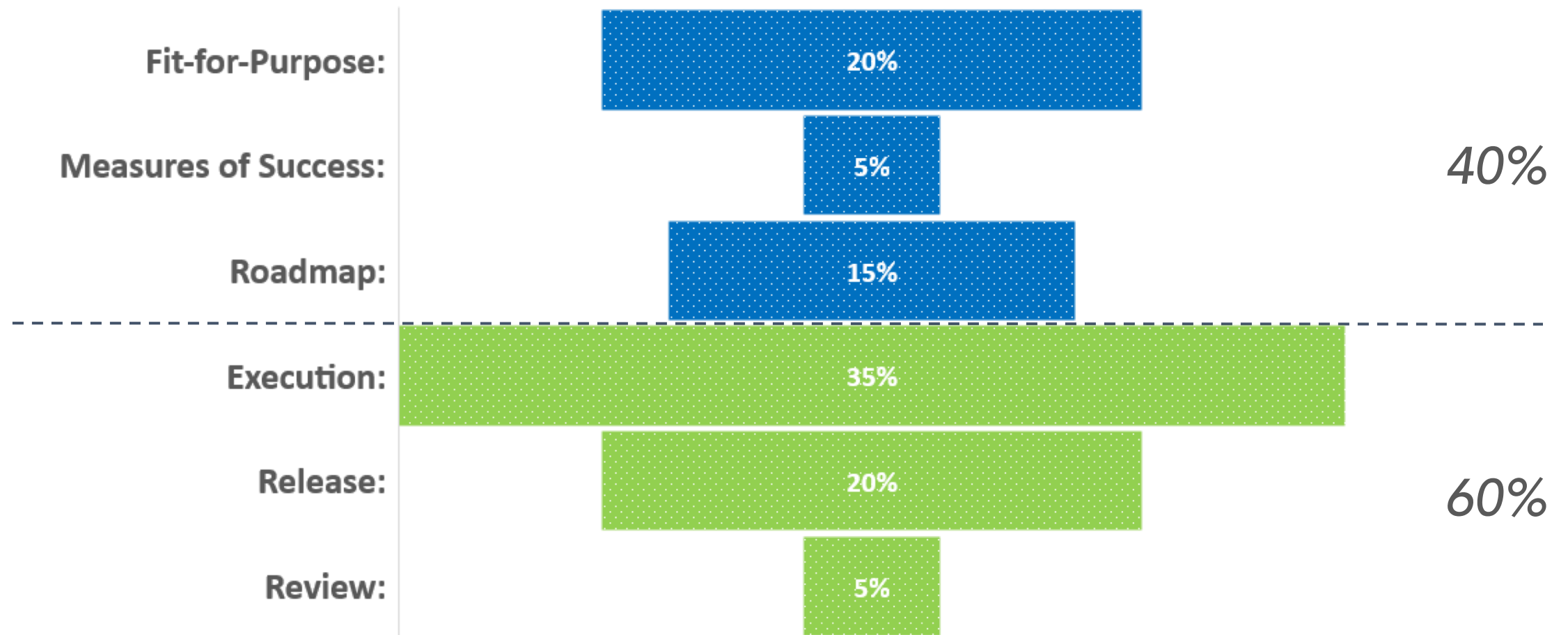
This checklist is

100%

COMPLETE

DATA REVIEW	ET	AE	ART	DATA	Notes	Date:
Have data elements been reviewed against laser/variable requirements?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		6/28/2019
Does data contain version codes if segmenting?				<input checked="" type="checkbox"/>		
Is Mail Tracking required? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Have you confirmed Data/Print qty by segment with AE, ET, DATA and Client?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
If client is providing data, confirm qty by segment and instructions associated		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	N/A	
Does delivered file(s) contain all necessary data fields and match w/ matrix & art?				<input checked="" type="checkbox"/>		
Are there NCOA/CASS certifications or does the printer need to process? Please explain	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	ET: Valid Provided	

Collaborative Data Initiatives



Thank You For Your Time

Alexa Sundberg and Erin Taylor
Gunderson Direct

alexa@gundir.com
GundersonDirect.com

APPENDIX: Purposeful Collaboration

1. Fit-for-Purpose

Business Goal

- Articulate Business Problem
- Define Data's Role
- State end Use of Data
- High Level Success Requirements

Discovery

- Existing Data Sources
- Sizing Exercises
- Condition, decay, flow, timing, updates
- Data Samples
- New data source or elements requirements
- Precision in data field definitions and original source
- Data flow tests: access, loading

Business Requirements Document Draft

- Business Stakeholders
- Minimal Viable
- Timing/Frequency
- Reporting Requirements
- Report/File/Dashboard Mock-ups
- Output Format

Pivotal Moment

- Re-articulate Business Problem
- Recommendation - proposed initiative is or is not fit-for-purpose
- Share / Consensus

2. Measures of Success

Business Model

- Review corporate business model
- Growth, ROI, LTV, Cross-Sell, Reduction, Expansion

Identify Business Stakeholders

- High-level business owners
- Resources
- End-Users

Measures & Metrics

- Define how stakeholders will measure success
- Define measures and metrics
- Establish baselines
- Determine scalability and rollout needs
- Tolerance for variance
- Perceptions

Consensus

- Publish
- Obtain Consensus

3. Roadmap

Solution / Strategy

- Develop data solution or strategy
- Review scalability
- Review future proofing
- Articulate how this solution will solve the business problem

Path to Solution

- Diagram the steps
- Indicate points-of-no-return
- Indicate what is not-in-scope
- Determine resource requirements

Schedule

- Develop a schedule
- Articulate dependencies
- Identify potential roadblocks
- Consider larger corporate ecosystem
- Consider existing data pipeline

Consensus

- Publish
- Obtain Consensus

4. Execution

Project Docs

- Develop project brief
- Develop project specs
- Fine-tune project schedule
- Add to data pipeline
- Reserve time for execution and implement

Communication

- Schedule stand-up meetings
- Schedule user testing or reviews way ahead of time
- Visualization of Progress for Stakeholders

End-Product Documentation

- Concurrently develop:
 - Dictionaries
 - User Guidelines
 - Reporting
 - Training Materials
 - Visualization of Results

Testing

- Develop test plans
- Allow time for Unit testing
- Doers and Checkers Model
- Allow time for user testing
- Iterate

5. Release

Schedule

- Consider soft release or beta
- Consider controlled groups of users
- Final Release
- Allow time to monitor initial release(s)

Communication

- Work with stakeholders for appropriate release messaging
- Consider greater ecosystem of business

Documentation

- Release:
 - Dictionaries
 - User Guidelines
 - Reporting
 - Training Materials

Training

- Implement User Training

6. Review

Schedule

- Results analyses (if appropriate)
- End-user Reviews
- Major Stakeholder Reviews
- Data Team Reviews

Lessons Learned

- Document lessons learned in the execution and results
- Document suggestions for next project/release

Update Documentation

- Dictionaries
- User Guidelines
- Reporting
- Training Materials

Update Training Materials

- Revise based on feedback