Women in Data

Championing a data culture ***byte by byte***

Alexa Sundberg with Erin Taylor and friends

GUNDERSON DIRECT

Our Company, Data Source Agnostic

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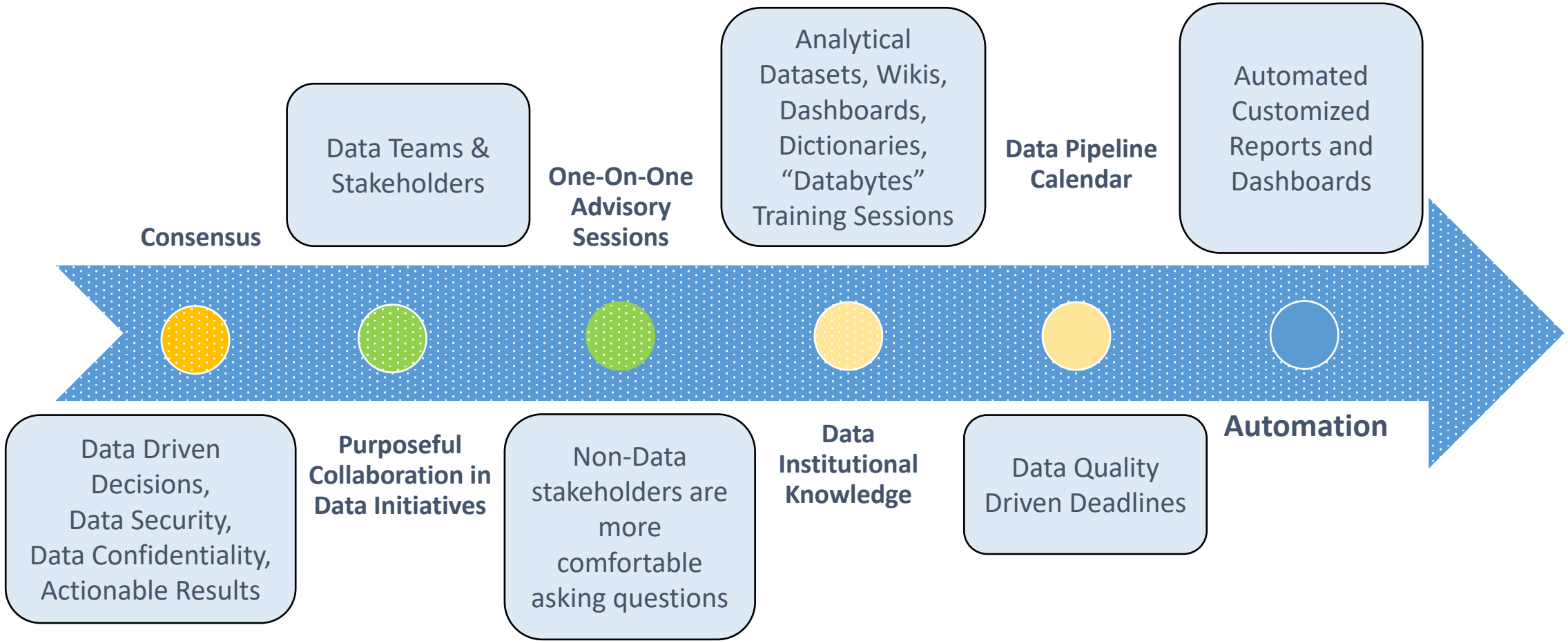
Approach to Creating a Data Driven Culture Work-in-Progress



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

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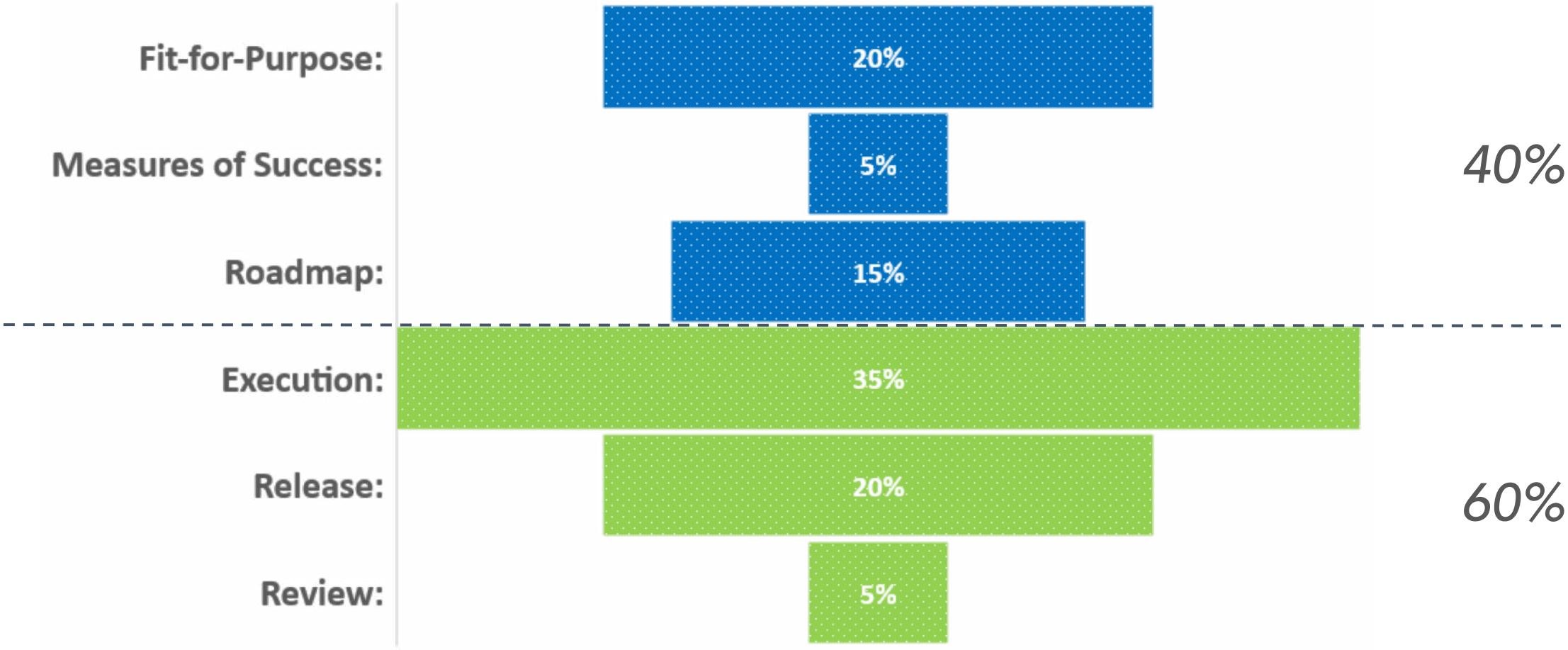
Collaborative Data Initiatives



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Thank You For Your Time

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APPENDIX: Purposeful Collaboration

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1. Fit-for-Purpose

Business Goal	Discovery	Business Requirements Document Draft	Pivotal Moment
• Articulate Business Problem • Define Data's Role • State end Use of Data • High Level Success Requirements	• 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 Stakeholders • Minimal Viable • Timing/Frequency • Reporting Requirements • Report/File/Dashboard Mock-ups • Output Format	• Re-articulate Business Problem • Recommendation - proposed initiative is or is not fit-for-purpose • Share / Consensus

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2. Measures of Success

Business Model	Identify Business Stakeholders	Measures & Metrics	Consensus
• Review corporate business model • Growth, ROI, LTV, Cross-Sell, Reduction, Expansion	• High-level business owners • Resources • End-Users	• Define how stakeholders will measure success • Define measures and metrics • Establish baselines • Determine scalability and rollout needs • Tolerance for variance • Perceptions	• Publish • Obtain Consensus

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3. Roadmap

Solution / Strategy	Path to Solution	Schedule	Consensus
• Develop data solution or strategy • Review scalability • Review future proofing • Articulate how this solution will solve the business problem	• Diagram the steps • Indicate points-of-no-return • Indicate what is not-in-scope • Determine resource requirements	• Develop a schedule • Articulate dependencies • Identify potential roadblocks • Consider larger corporate ecosystem • Consider existing data pipeline	• Publish • Obtain Consensus

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4. Execution

Project Docs	Communication	End-Product Documentation	Testing

• Develop project brief
• Develop project specs
• Fine-tune project schedule
• Add to data pipeline
• Reserve time for execution and implement
	• Schedule stand-up meetings
	• Schedule user testing or reviews way ahead of time
	• Visualization of Progress for Stakeholders
		• Concurrently develop:
		  • Dictionaries
		  • User Guidelines
		  • Reporting
		  • Training Materials
		  • Visualization of Results
			• Develop test plans
			• Allow time for Unit testing
			• Doers and Checkers Model
			• Allow time for user testing
			• Iterate

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5. Release

Schedule	Communication	Documentation	Training

• Consider soft release or beta
• Consider controlled groups of users
• Final Release
• Allow time to monitor initial release(s)
	• Work with stakeholders for appropriate release messaging
	• Consider greater ecosystem of business
		• Release:
		  • Dictionaries
		  • User Guidelines
		  • Reporting
		  • Training Materials
			• Implement User Training

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6. Review

Schedule	Lessons Learned	Update Documentation	Update Training Materials
• Results analyses (if appropriate) • End-user Reviews • Major Stakeholder Reviews • Data Team Reviews	• Document lessons learned in the execution and results • Document suggestions for next project/release	• Dictionaries • User Guidelines • Reporting • Training Materials	• Revise based on feedback

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