Analytics Anti-Roadmap Triage Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this before the next quarterly planning session when the roadmap is filling up with analytics ideas that all sound plausible. The goal is to name which projects actually improve a decision, which ones are being proposed too early, and which ones should be killed or narrowed before they burn a quarter.

STEP 1: LIST THE CURRENT CANDIDATES

- Write down every analytics, data, dashboard, attribution, AI, tooling, and architecture project being proposed or already drifting into the quarter.

- For each item, name the executive or team sponsor and the meeting where it will be defended.

STEP 2: PRESSURE-TEST EACH PROJECT

- Which specific decision gets better if this project works?

- Who will use the output in a real operating rhythm: weekly forecast, board prep, planning, campaign review, or customer workflow?

- Is the trust layer already good enough, or would the project sit on loose definitions, weak CRM hygiene, or shaky source ownership?

- What smaller version could prove value in two to four weeks instead of asking for a full-quarter commitment?

STEP 3: SCORE THE PROJECT FROM 1 TO 5

- Decision impact: would this change a real budget, staffing, pipeline, or growth decision?

- Trust readiness: are the definitions, source systems, and owners stable enough to support it?

- Dependency risk: how much hidden cleanup has to happen before the shiny part works?

- Workflow fit: will the output land in a workflow people already use?

- Quarter-worthiness: is this truly the best use of one quarter of attention right now?

STEP 4: MAKE THE CALL

- Keep and fund now:

- Narrow to a smaller proof point:

- Defer until the foundation improves:

- Kill outright and explain why:

PLANNING NOTES

- Most expensive project still pretending to be urgent:

- Foundation fix we keep avoiding:

- Sponsor conversation that needs to happen this week:

- Signal that the roadmap got sharper instead of just shorter: