

Analytics Partner Readiness Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this before you hire an outside analytics consultant or fractional data partner. The goal is to make the buying conversation more honest: name the decision that needs help, expose the messy-data risks early, choose one internal owner, and clarify what success should look like when the engagement ends.

STEP 1: NAME THE REAL REASON YOU ARE HIRING HELP

- Which decision keeps breaking today: board reporting, attribution, GTM planning, forecasting, CRM workflow design, metric alignment, or AI readiness?
- What is the current cost of leaving it unresolved for another quarter?
- What would leadership call a successful outcome in plain English?

STEP 2: PREPARE THE INTERNAL TEAM

- Name one internal owner with the authority to answer scope, access, and priority questions quickly.
- List the stakeholders who will need to align on definitions, workflow changes, or source-of-truth calls.
- Mark where you expect the first uncomfortable readout: metric logic, source quality, process design, or team disagreement.

STEP 3: SCORE READINESS FROM 1 TO 5

- Problem clarity: do we agree on the decision that needs to get better?
- Data honesty: are we willing to hear that the current reporting stack is weaker than we thought?
- Owner authority: does the internal lead have enough authority to unblock the work?
- Stakeholder alignment: will the right people show up when definitions or priorities need a call?
- Independence plan: do we know what capability, documentation, or handoff should exist when the engagement ends?

STEP 4: SCOPE THE FIRST PHASE

- Diagnostic or translation sprint we need first:
- Deliverable we should not expect in phase one:
- Fastest proof point that would justify a deeper engagement:
- Risk that could waste money if we ignore it now:

PARTNER EVALUATION NOTES

- Questions we need answered before signing:
- Signs the consultant is overselling certainty:
- Signals that the engagement is designed to leave us stronger, not dependent:
- Decision owner for the final yes or no: