

# Data Activation QA Checklist

## Domain Methods

Purpose: decide whether a reverse ETL sync, score, audience, alert, CRM field, lifecycle segment, or AI-assisted workflow is safe enough to launch and monitor.

### 1. Name the source model and owner

- Activated value or audience:
- Source model / table:
- Source systems behind it:
- Business definition owner:
- Data/model owner:
- Destination owner:
- Workflow owner:

Do not launch if the only owner is 'the data team.' Data can own the model; the business still owns the action the workflow will take.

### 2. Review destination field mapping

- Destination system:
- Field, audience, score, alert, or segment being written:
- Write behavior:  create  update  overwrite  append
- Null behavior:
- Identity / account matching rule:
- Manual override precedence:
- Downstream automations or reports that read this value:

Destination owner sign-off:

I have reviewed sample records and the write behavior is safe.

### 3. Match freshness to workflow risk

- Sync cadence:
- Maximum safe age of the value:
- Expiry rule for alerts, audiences, or recommendations:
- Where freshness is visible to downstream users:

If stale data can trigger customer-facing action, show the timestamp or expire the action before it can mislead a rep, CSM, lifecycle marketer, or AI-assisted workflow.

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### 4. Test suppression and exclusions

Check the records that should not be touched.

- Unsubscribed contacts
- Customers with open high-severity support cases
- Holdout groups
- Disqualified opportunities or inactive accounts
- Partners, employees, test accounts, agencies
- Customers in conflicting journeys or plays
- Contract, billing, privacy, or regional restrictions

Sample review:

- 20 included records reviewed by destination owner:  yes  no
- 20 excluded records reviewed by destination owner:  yes  no
- Biggest surprise found:

### 5. Define alerts and rollback

- Sync failure owner:
- Row-count spike/drop threshold:
- Null-rate threshold:
- Match-rate threshold:
- Destination error owner:
- Who can pause the workflow:
- What gets paused first:
- How existing values are protected during rollback:

Example rollback rule: If null rate exceeds \_\_\_\_% or match rate falls below \_\_\_\_%, pause writes, notify owner, and review samples before the next sync runs.

### 6. Schedule the post-launch review

- Review date:
- Workflow owner attending:
- Destination owner attending:
- Data/model owner attending:
- Five examples where the workflow helped:
- Five examples where the value was stale, wrong, duplicated, or confusing:
- Decision:  expand  stay limited  pause and repair

Next step if the workflow is ready: Data Activation.

Next step if inputs or source logic are not trustworthy: Data Foundation.