

Data Engagement First-Move Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this in a leadership, marketing, RevOps, finance, or data working session when the company knows the data problem is real but still is not sure whether the right first move is diagnosis, translation, deeper implementation, or a stop-and-scope reset.

1. NAME THE DECISION UNDER PRESSURE

- Meeting or workflow this affects first: _____
- What answer is not trustworthy enough today? _____
- What expensive decision keeps stalling because of that? _____
- Which team feels the pain first? _____

2. SCORE A DATA AUDIT

- We know the business question, but the trust break is still hidden: _____
- We need to trace fields, handoffs, syncs, or report lineage: _____
- One focused diagnosis pass would make the next move clearer: _____
- What proof do we need from the audit? _____

3. SCORE A TRANSLATION SPRINT

- The ask is still mixing dashboards, cleanup, tooling, and strategy: _____
- The room has not agreed on the decision, artifact, or owner yet: _____
- A tighter brief would make every later move cheaper and clearer: _____
- What ambiguity should be removed first? _____

4. SCORE A WAREHOUSE REBUILD

- The systems debt is already concrete enough to implement against: _____
- Owners, systems, and first success condition are already named: _____

- The team can point to the models, joins, or handoffs that must change: _
- What should the rebuild still not be asked to solve? _____

5. CHECK FOR THE STOP-AND-SCOPE PATH

- Nobody can name the first decision that should improve: _____
- The brief still sounds like 'make the data better somehow': _____
- Leadership urgency is real, but the scope is still too vague to buy well: _
- What scoping question has to be answered before delivery work starts? ___

6. CHOOSE THE FIRST MOVE

- Highest-confidence first move: _____
- Why this lane, not the others? _____
- Named owner for the next step: _____
- Review date: _____

SUGGESTED ROUTES

- Use Translate the Ask when the room still needs a tighter decision brief before bigger delivery work starts.
- Use Data Foundation when the scope is already concrete and the architecture debt is now the limiting factor.