

dbt Core vs Cloud Decision Worksheet

Domain Methods | Lightweight working-session worksheet

Use this worksheet before the team chooses a dbt operating path. The goal is to separate software preference from ownership, workflow risk, and foundation readiness.

1. Name the decision

- Which recurring decision or meeting must this dbt work support?
- Which model or mart would make that decision faster or more trustworthy?
- Who will say the model is good enough to use?

2. Map the owners

- Production jobs owner:
- Model review owner:
- Source freshness owner:
- Business definition owner:
- Incident communication owner:

3. Score the workflow gap

- Core fits if orchestration, reviews, docs, and alerts are already owned.
- Cloud fits if managed jobs, hosted docs, permissions, and run visibility reduce real risk.
- Neither fits yet if source precedence, metric definitions, or business requirements are unresolved.

4. Choose the first proof point

- Pick one decision-grade model: revenue, pipeline, lifecycle, retention, CAC, or attribution.
- List the source tables and known trust risks before implementation starts.
- Write the tests that would catch the failure stakeholders fear most.

5. Decide the path

- Core path: name the scheduler, environment, alert, docs, and review workflow.
- Cloud path: name what managed jobs, docs, permissions, or visibility will replace.
- Pause path: name the foundation or translation work that must happen first.

Next step: if ownership, source trust, or metric definitions are unclear, fix the foundation before treating Core vs Cloud as the main decision.