

dbt Investment Trust Checklist

Domain Methods | Lightweight working-session worksheet

Use this checklist on one important dbt model or mart. The goal is not to grade the repo; it is to test whether dbt work creates business trust.

1. Decision fit

- Which business decision depends on this model or mart?
- Which meeting, dashboard, or planning cycle uses the number?
- If the model changed tomorrow, who would notice first?

2. Definition ownership

- Who approves the business definition and future changes?
- What does the metric include, exclude, and intentionally ignore?
- Where would finance, RevOps, growth, or product challenge it?

3. Decision-risk testing

- Which failure would damage trust most if it reached a stakeholder?
- Do tests catch that failure, or only generic column health?
- What one test would have prevented the last reporting fire drill?

4. Release and adoption

- What changes when this model ships or changes definition?
- Which dashboards, reports, or recurring meetings need context?
- What spreadsheet or shadow workaround should disappear if trust improves?

5. Next move

- If the score is weak, do not write more docs by default.
- Pick the repair: definition cleanup, owner alignment, risk tests, release handoff, or adoption support.
- Route bigger foundation issues into a focused Data Foundation cleanup plan.

Next step: if the checklist exposes foundation risk, fix definitions, owners, tests, and release discipline before adding more documentation.