

First-Party Measurement Readiness Worksheet

Before you trust attribution, MMM, platform ROAS, or a spend decision

Use this in a 30-minute spend or measurement review. Score each input check before choosing a model.

1. Name the decision

Budget / channel / campaign decision: _____

Decision owner: _____ Due: _____

Evidence bar: directional / budget-ready / causal proof / board-grade

2. Score the seven readiness checks

Use 0 = broken, 1 = directional, 2 = usable with caveats, 3 = budget-ready.

Server-side and event capture: 0 1 2 3 Notes: _____

CRM source ownership: 0 1 2 3 Notes: _____

Offline conversion handoffs: 0 1 2 3 Notes: _____

Consent and privacy caveats: 0 1 2 3 Notes: _____

UTM and campaign taxonomy: 0 1 2 3 Notes: _____

Warehouse and revenue joins: 0 1 2 3 Notes: _____

Finance reconciliation: 0 1 2 3 Notes: _____

3. Assign the confidence band

0-10: source-capture repair first. Do not let a model settle the budget argument yet.

11-16: directional reporting. Use for triage, QA, and cleanup priority decisions.

17-21: ready for budget decisions, with visible caveats and named ownership.

If any check scores 0, write the repair needed before leadership uses the number.

4. Choose what the method is allowed to do

Platform ROAS can support: _____ Must not claim: _____

Attribution can support: _____ Must not claim: _____

MMM can support: _____ Must not claim: _____

Incrementality can support: _____ Must not claim: _____

5. Write the caveat that travels with the number

Observed / modeled / uploaded / reconciled / margin-adjusted? Circle what applies.

Caveat sentence for the readout: _____

First repair that would change confidence fastest: _____

6. Route the next move

If spend confidence is the pain: SaaS Marketing Attribution or Where Did the Money Go?

If source, warehouse, CRM, or finance reconciliation is the blocker: Data Foundation.

Next owner: _____ Next working session: _____