

The Quarterly Marketing Data Review Template

Use this quarterly to catch metric drift, dashboard decay, and decision mistakes before they compound.

1. Metric Consistency Check

- Which KPIs show up in leadership, marketing, sales, and finance reviews?
- Which KPIs now have different definitions, filters, or source systems?
- Which metrics need one shared owner before next quarter?

2. New Data Sources

- What new tools, sheets, event streams, or channels entered the stack this quarter?
- Are they integrated, documented, QAed, and assigned to an owner?
- Which new source is most likely to create reporting confusion next quarter?

3. Dashboard Adoption Review

- Which dashboards are used weekly by decision-makers?
- Which dashboards are stale, ignored, or still screenshot-only artifacts?
- Which one report should be retired, replaced, or simplified?

4. Decision Audit

- What 3-5 important decisions were made using data this quarter?
- Which decision proved directionally right, and why?
- Which decision missed, and was the issue bad data, bad interpretation, or bad execution?

5. Next Quarter Priorities

- List the 3-5 highest-leverage fixes for next quarter.
- Assign an owner, deadline, and success condition for each.
- Name one thing to stop doing so the priority list stays believable.

Recommended cadence: 60 minutes, one owner, one shared document, one short follow-up list.

Domain Methods: turn messy marketing and revenue data into decisions leaders trust.