

**DA DATA  
ADVANTAGE  
Planner**

Grow your business with data

# The Data Advantage Planner

Your guide to find a data advantage.

## How do you begin?



Print as many copies as you like. The planner is free for you to use over and over.



Fill out the planner. If you need guidance along the way, you can get instant access to our online video courses at [dataadvantage.tv](https://dataadvantage.tv).



Finally, discuss and review the data advantage you've identified with your board, leadership, and teams. Remember, creating multiple data advantages for discussion and review is encouraged. Often collaboration is needed to ensure you are selecting the best idea to grow your business with data.

Reach out if you would like to connect. [Send us an email.](#)

Sincerely,

Zack & Michael | Founders | Data Advantage LLC

For:

By:

Version:

Date:



## Strategy Statement

**In order to** \_\_\_\_\_  
*Outcome (board/executive level objective)*

**we must** \_\_\_\_\_  
*Benefit (something that produces the Outcome)*

**through** \_\_\_\_\_  
*Tactic (actionable plan to achieve Benefit)*

**by measuring** \_\_\_\_\_  
*Measurement (meaningful, relevant, & aligned)*

**found in** \_\_\_\_\_  
*Data (list of necessary sources)*



## Communication Statement

**A** \_\_\_\_\_  
*Audience (decision-making role or position)*

**who needs to** \_\_\_\_\_  
*Outcome (or Benefit/Tactic relevant to Audience)*

**sees** \_\_\_\_\_  
*Fact (pertinent information)*

**understands** \_\_\_\_\_  
*Insight (awareness for an optimized decision)*

**so they can** \_\_\_\_\_  
*Action (desirable Audience response)*



## Asset: Team

### Oversight

- Sponsor \_\_\_\_\_
- Owner \_\_\_\_\_
- Manager \_\_\_\_\_

### Collaboration

- Subject matter expert
- Internal partner
- External partner

### Design

- Data Analysis
- Data Visualization
- UI/UX Design

### Development

- Data Engineering
- Data Modeling
- Data Science
- ML Engineering
- Software Engineering
- Dev Ops
- Data Expertise

### Technology

- Vendor Expertise
- Proprietary Expertise



## Asset: Product

### Present

- Business app
- Data portal
- Customer portal
- Website
- Spreadsheet

### Promote

- Presentation
- Press/media
- Search content
- Lead generator
- Thought leadership

### Publish

- Warehouse
- Business app
- Share
- Marketplace
- API

### Personalize

- Email
- Text/Alert
- Call
- Social/DM
- Offer
- Good/Service



## Asset: Platform

### Collect

- Annually
- Quarterly
- Monthly
- Weekly
- Daily
- Real-time

### Enrich

- Quality
- Aggregation
- Calculation
- Scoring
- Prediction
- Forecasting
- Categorization
- Segmentation
- Attribution
- Targeting
- Benchmarking
- Sentiment

### Store

- Latest data
- Change data
- Historical data
- Legacy data