

4step



Basic Data Plan

Introduction

You're likely here because data intimidates you.
As a leader, you're unsure how to handle it and afraid to admit it...

That's OK!



This plan is the fastest path to understanding your data.

By the time you finish this guide, you'll have a **1-Page Data Plan** ready to execute.
This plan gives you clear steps and tools to use your data effectively.

By the end, you'll be able to:

- Understand Data Foundations
- Make Better Decisions
- Mature as a Data-Driven Leader

Data isn't Everything

in an organization, but it's **as essential as oxygen...**

nothing, NOTHING, kills a business faster than lack of data.



Why ?

1

Nearly every business challenge can be addressed with additional data.

2

Data reveals the destinations of your resources.

Most **Data Immature** Companies rely on

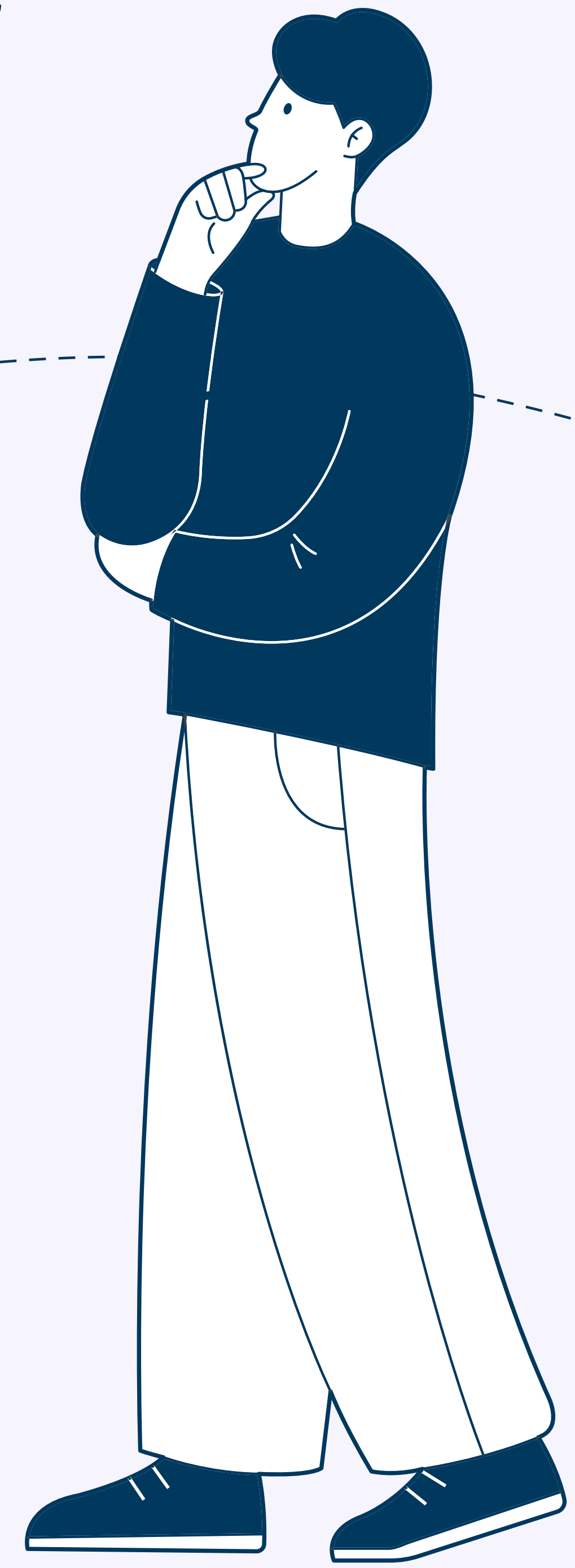
Gut feelings

for big decisions instead of data.

"They're flying blind, calm as a Hindu cow, without a plan."

Most of you are nodding your head right now.
(mostly in frustration)

If you nodded, are you really surprised success hasn't been as easy as you expected?



Who or what are you blaming ?

Most businesses blame their industry when things do not go their way.

Some of the most common complaints I hear are:

**MARKETING NO
LONGER WORKS!**

**IT'S TOO
COMPETITIVE!**

THE MARGINS ARE TOO LOW!

**I CAN'T FIND ANY GOOD TALENT
TO SCALE THE TEAM!**



However, rarely is the industry to blame...

Afterall, there are others in the same industry that are winning.

Winning by a lot.

So, what are the winners doing differently?



1

They have plans.

2

Those plans are backed by data.

3

Their data decides how their plans adapt.

4

Rinse and repeat.

Winners never wing it.

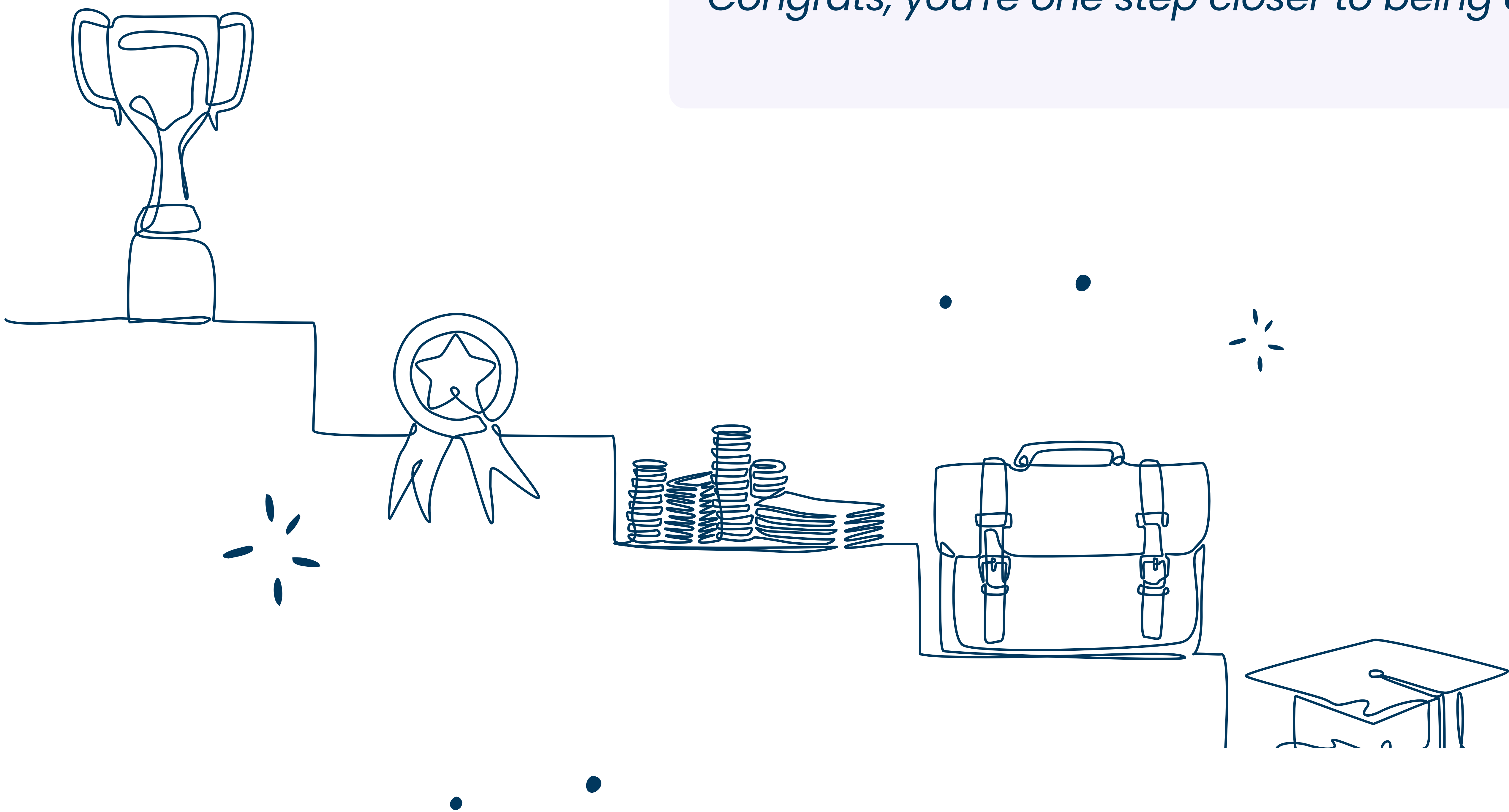
So why are you winging it with your data?

You literally have the answers to your business problems right in front of you.

The solutions you seek are hidden within a handful of separate data systems you are already using, but you're not sure how to combine them and put it all together... **yet.**

You're about to learn how to put it all together.

Congrats, you're one step closer to being a winner.



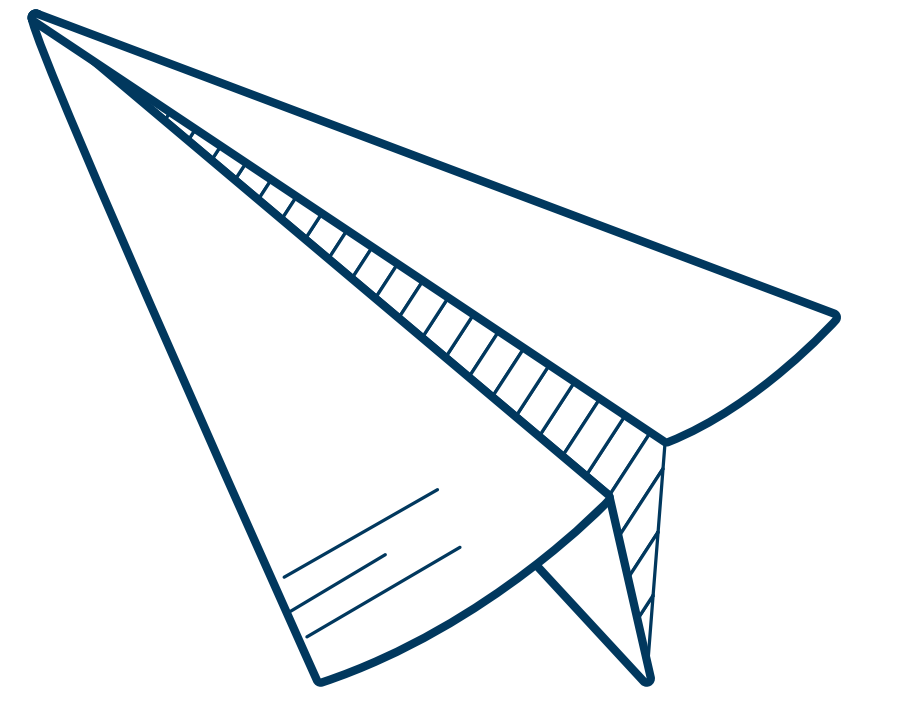


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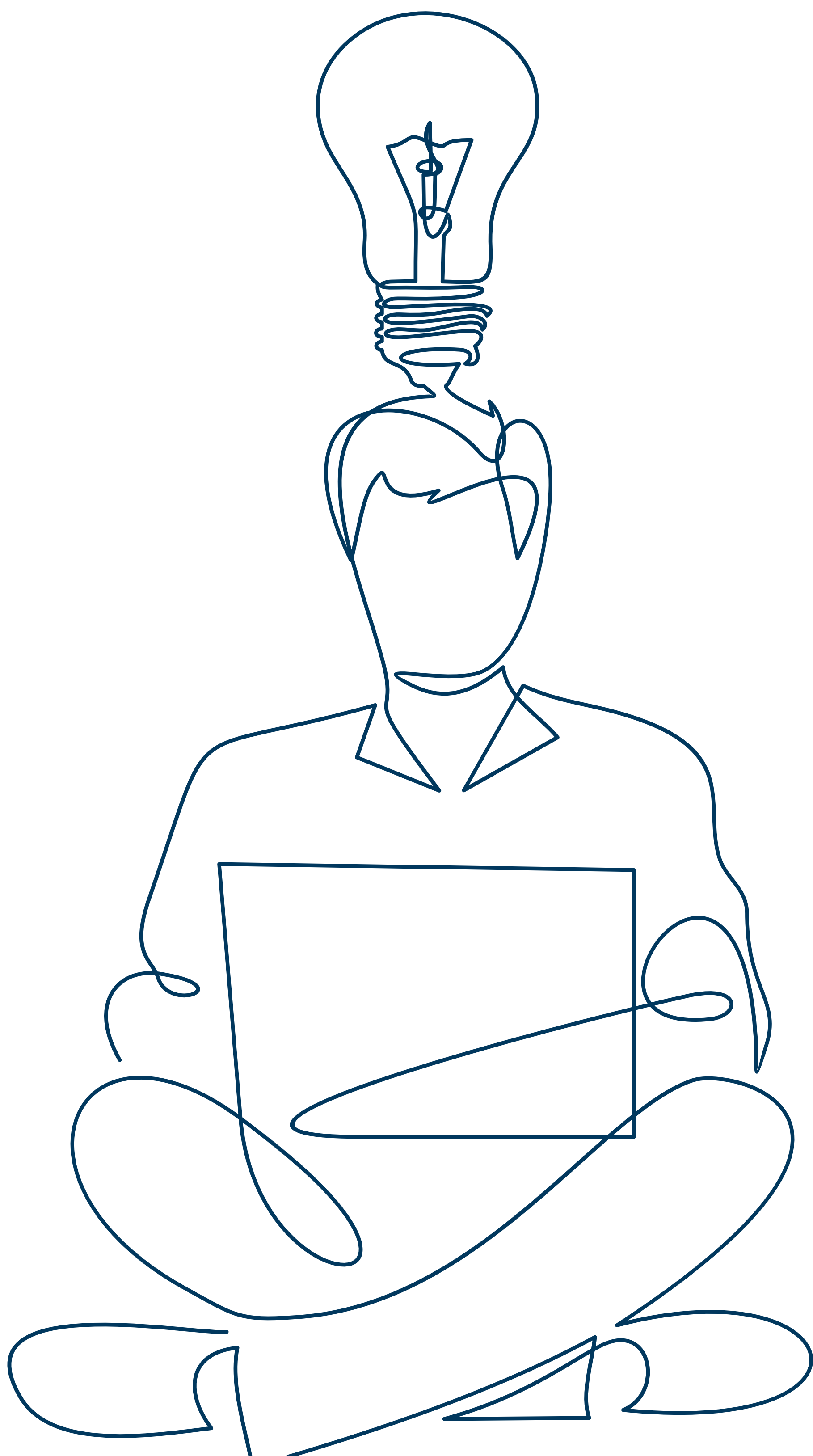
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Your 4 Step Basic Data Plan Outline

The great thing about this 4 Step Basic Data Plan is that it rarely, if ever, changes.

You will stick to these four steps every time you work with new data:

Step 1



DATA COLLECTION

First, gather data from everywhere applicable



Seems like a big task, right?

Well... it is.

But we are going to simplify.
Stick with me.

Step 2

DATA STORAGE

Second, you stash all that data somewhere safe and accessible.

Think databases, data warehouses, and cloud storage.



Soon, you will have all your data, in one place, connected, and communicating.

This is the core of your business.

This is where it gets exciting!

Step 3

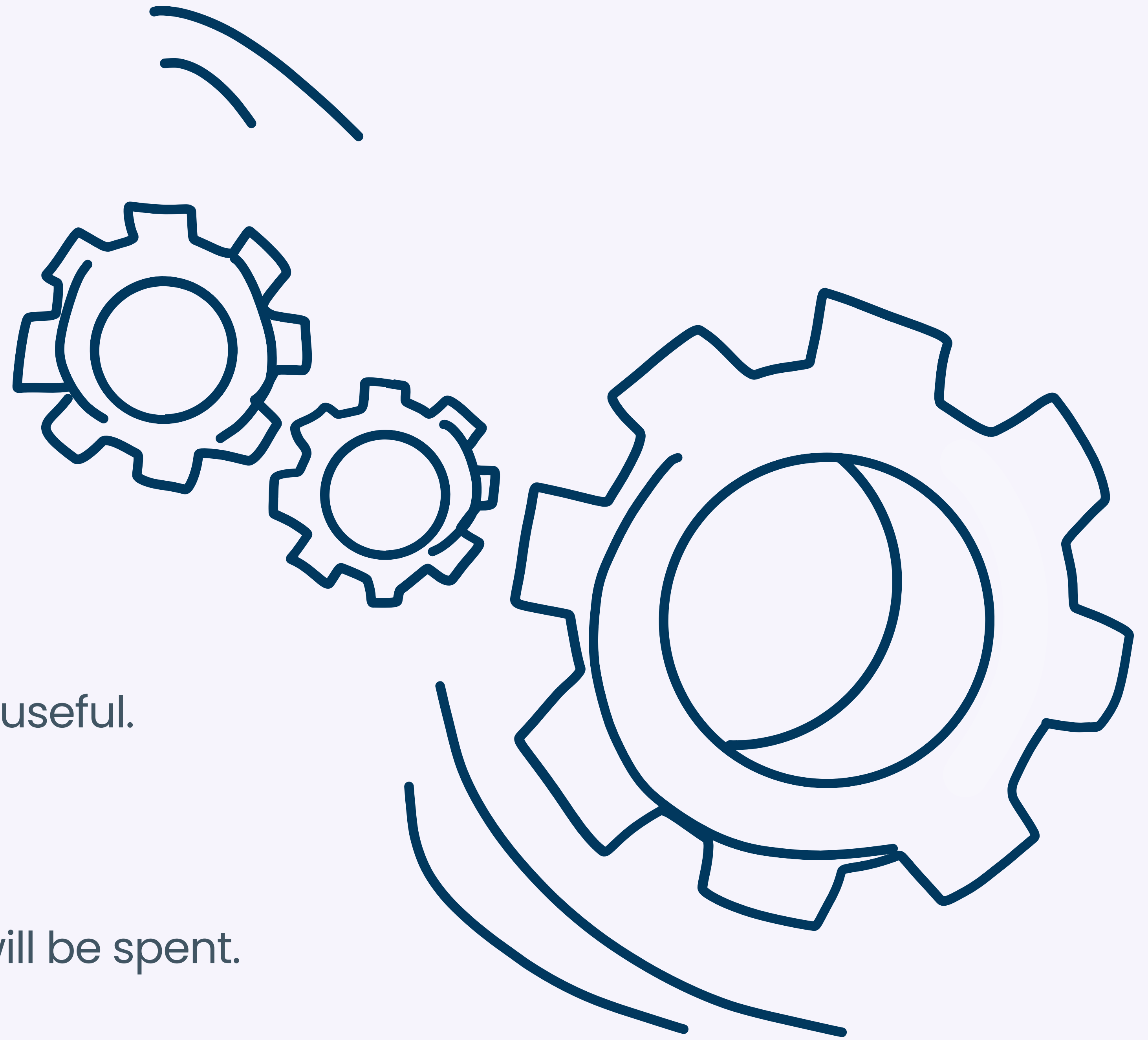
DATA PROCESSING

Third, you turn that raw data into something useful.

This is 75% of the “hard” work.

This is where most of your dollars and time will be spent.

It is crucial to get this part right.



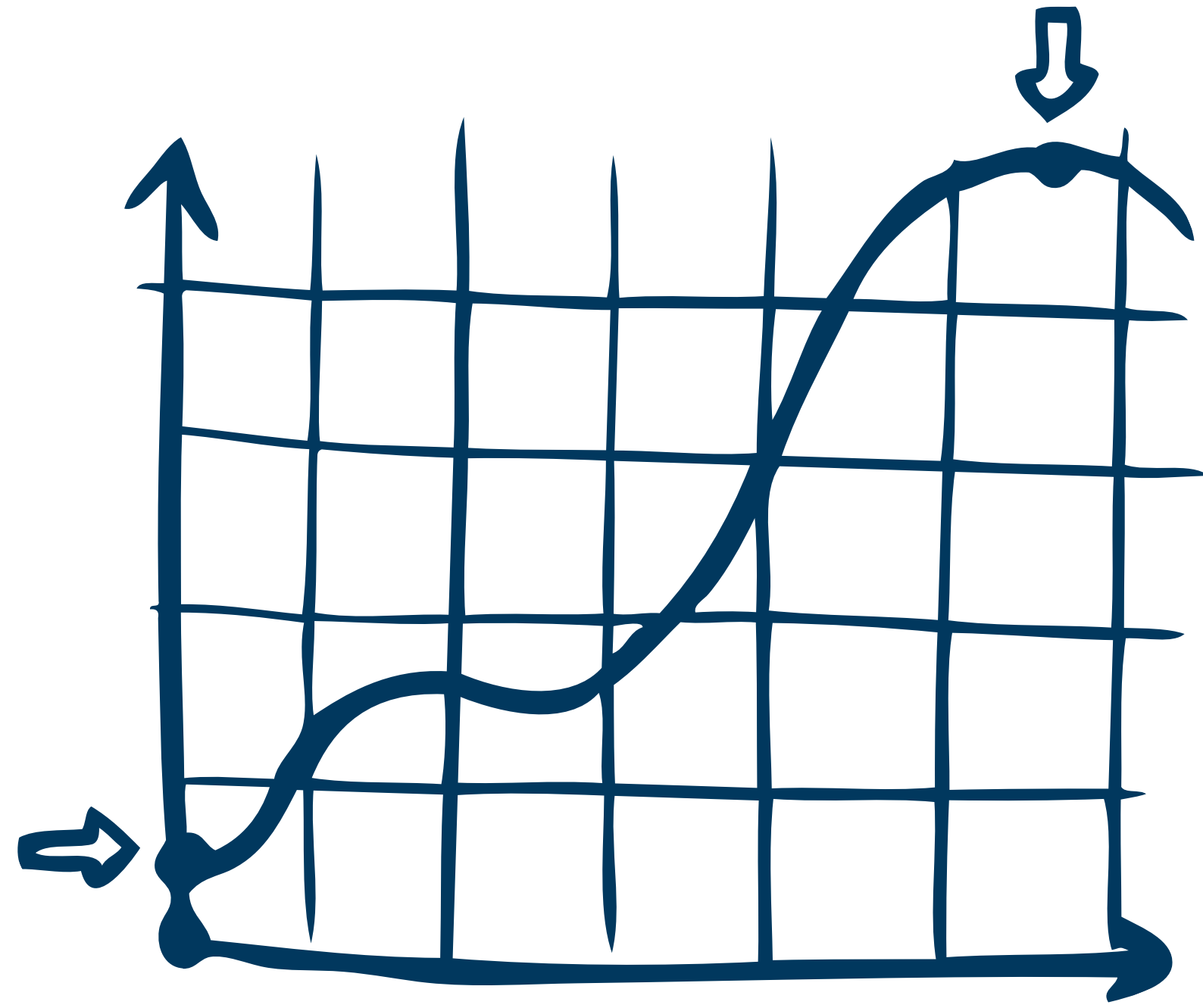
You want clean, organized data...

And you want to make sure you are working with people who do this very well.

I've seen too many companies go cheap here and end up paying significantly more in the long run.

This is due to the risks of getting your data wrong.





Step 4

DATA ANALYTICS & VISUALIZATION

Finally, analyze and visualize your data with charts, graphs, and dashboards to make it easy to understand and share. A good dashboard clearly drives insights and actions.

Note from the Author.

Many companies overlook this final step and end up with ineffective dashboards that provide little to no real value. They hire a sketchy-at-best data company who knows a few tricks and seem competent but lack true expertise.

*As of writing this guide, I've worked with around 60 businesses.
At least 40 of them failed at this step and regretted it later.*

Take my advice here or learn the hard way.

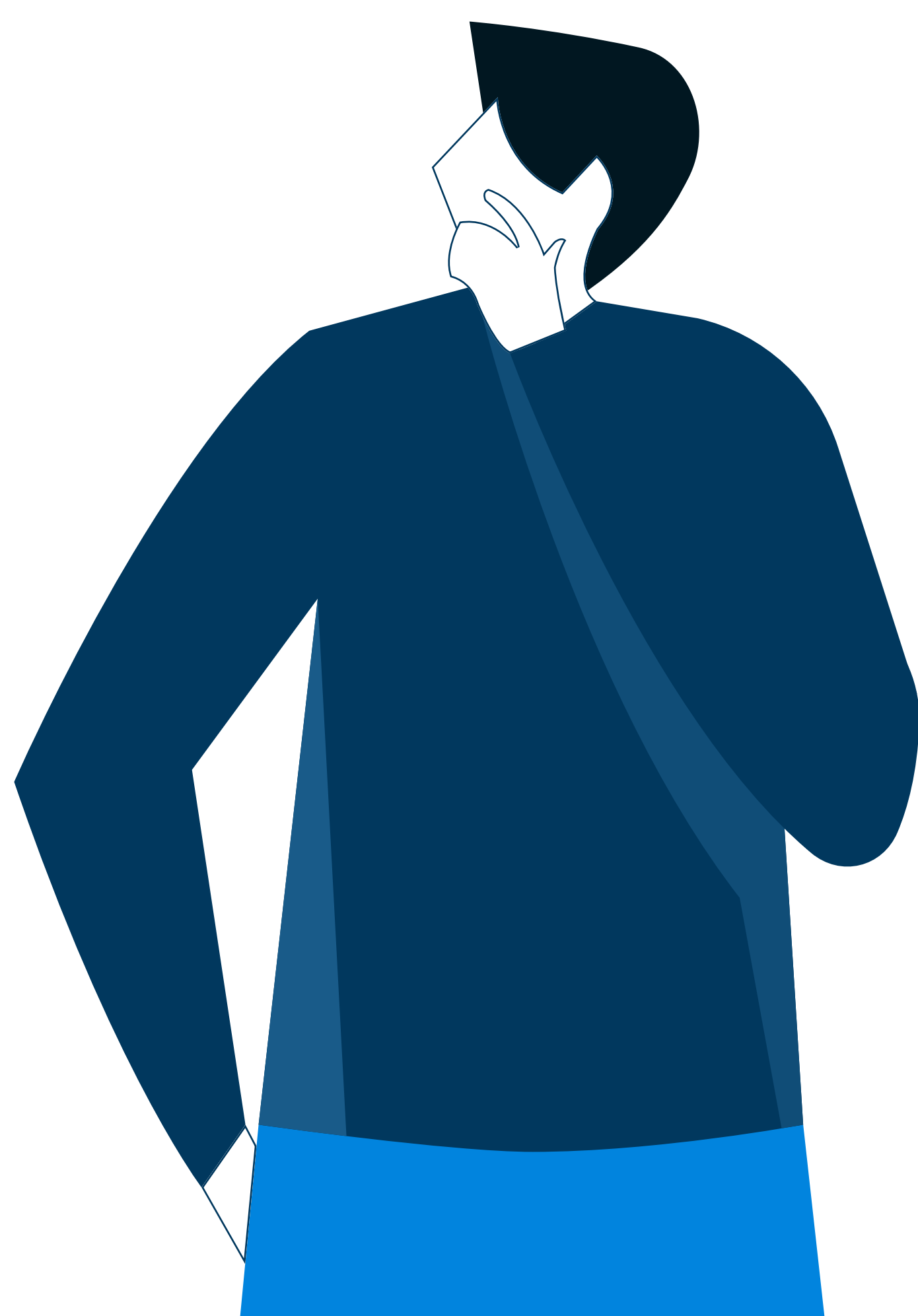
Don't waste your time and money by failing at the last step.

Do not, I repeat, do NOT go with a junior analyst handling all your data analytics responsibilities.

If you do not have talent here, you are going to waste Steps 1-3.

If your data visualizations suck, no one on your team will care (or use) the dashboards.

If the calculations are wrong, your credibility is gone.



All your work **will** **be for nothing.**

You didn't come this far to only get this far!

Ensure your dashboards are clear, informative, and actionable.

Congrats,

You've Learned The
**4 Step Basic
Data Plan**



Yes, it's that simple.

No, you're not ready yet.

KEEP READING



*If you only read this chapter...
Congrats, you're a prime Dunning-Kruger candidate.*

Step 1

YOUR SIMPLE DATA COLLECTION METHOD

Alright, let's face it— collecting all your data in one place is the sole reason why your business is paralyzed. You have no clue what you're doing. You freak out, panic, and hire the first sketchy, smoke-and-mirrors, location-arbitraged, "consulting firm" who put together a shiny PowerPoint and promised you the moon for \$5 bucks.

And then that naturally fails... you become disenfranchised with the whole process and go back to your Excel spreadsheets to lick your wounds...and now you're here (probably).

I get it... It's overwhelming!

You've got numbers coming at you from every direction:



Scattered spreadsheets, different formats, missing pieces—it's a mess.

Here's the secret...

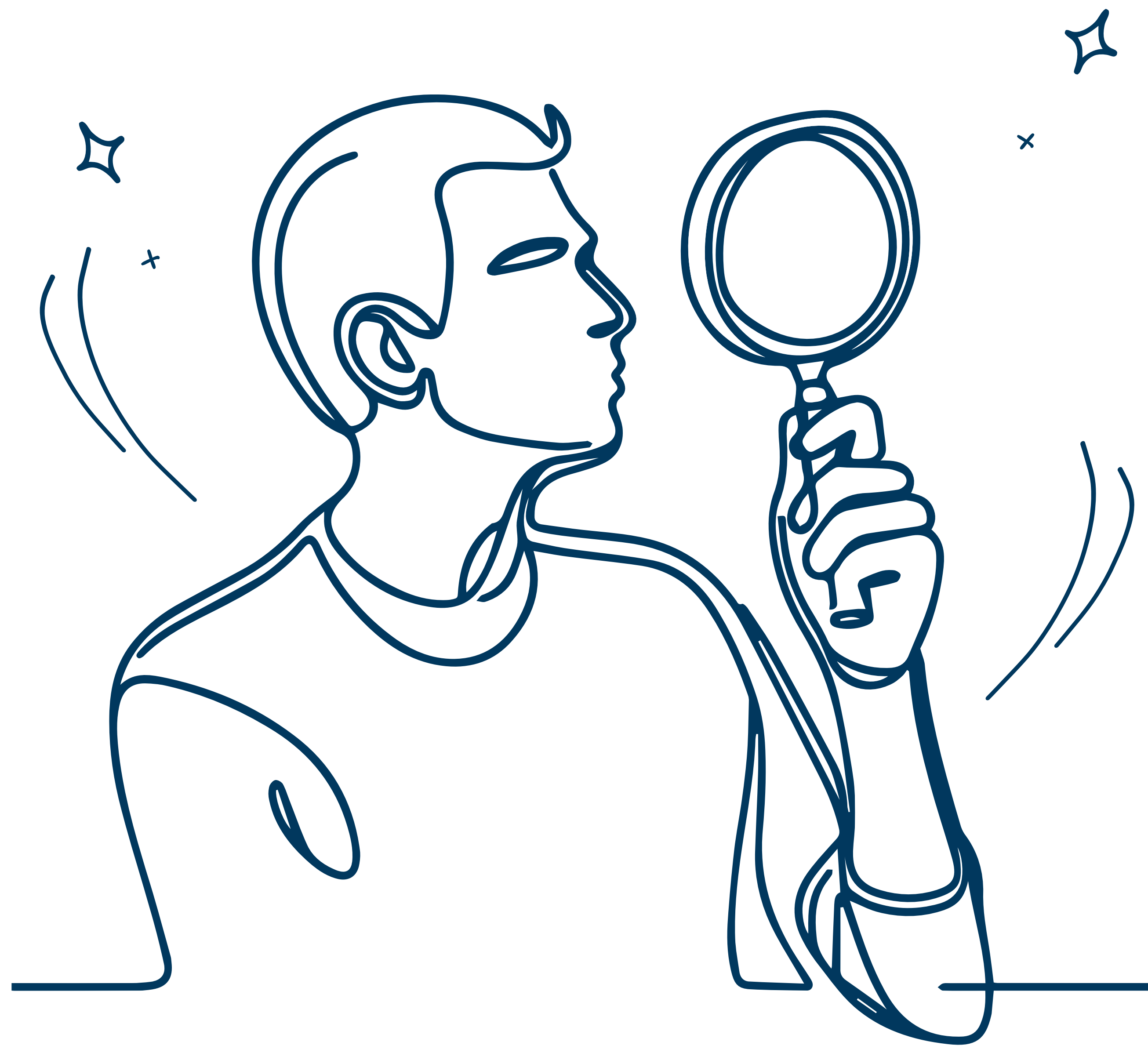
it doesn't have to be that way!

The key is a simple, structured approach.

This approach can be broken down into 2 goals.

GOAL 1:

Identify Your Data Sources



First things first, you need to know where all this data is coming from.

Take a deep breath and make a list:

- **Finance**

Budget reports, expense tracking, revenue data.

- **Customer**

Feedback forms, surveys, support tickets.

- **Sales**

Transaction records, CRM entries, sales funnels.

- **Marketing**

Campaign performance, social media metrics, website analytics.

- **Operations**

Inventory levels, supply chain metrics, production stats.

- **Customer Service**

Call logs, service request data, resolution times.

- **HR**

Employee records, performance reviews, training completion

GOAL 2:

Get Familiar with Data Tools

Now that you know what data you have, it's time to gather it efficiently.

Think of this as equipping yourself with the right tools for the job.

You wouldn't try to cut down a tree with a butter knife, right?

So, let's pick the right tools for data collection.

To keep this simple, we'll focus on only two tools.

Cloud Data Warehouses & APIs.

✔ Cloud Data Warehouse

A Cloud Data Warehouse allows every data point from your list end up in one centralized place.

Accessible whenever and wherever needed.

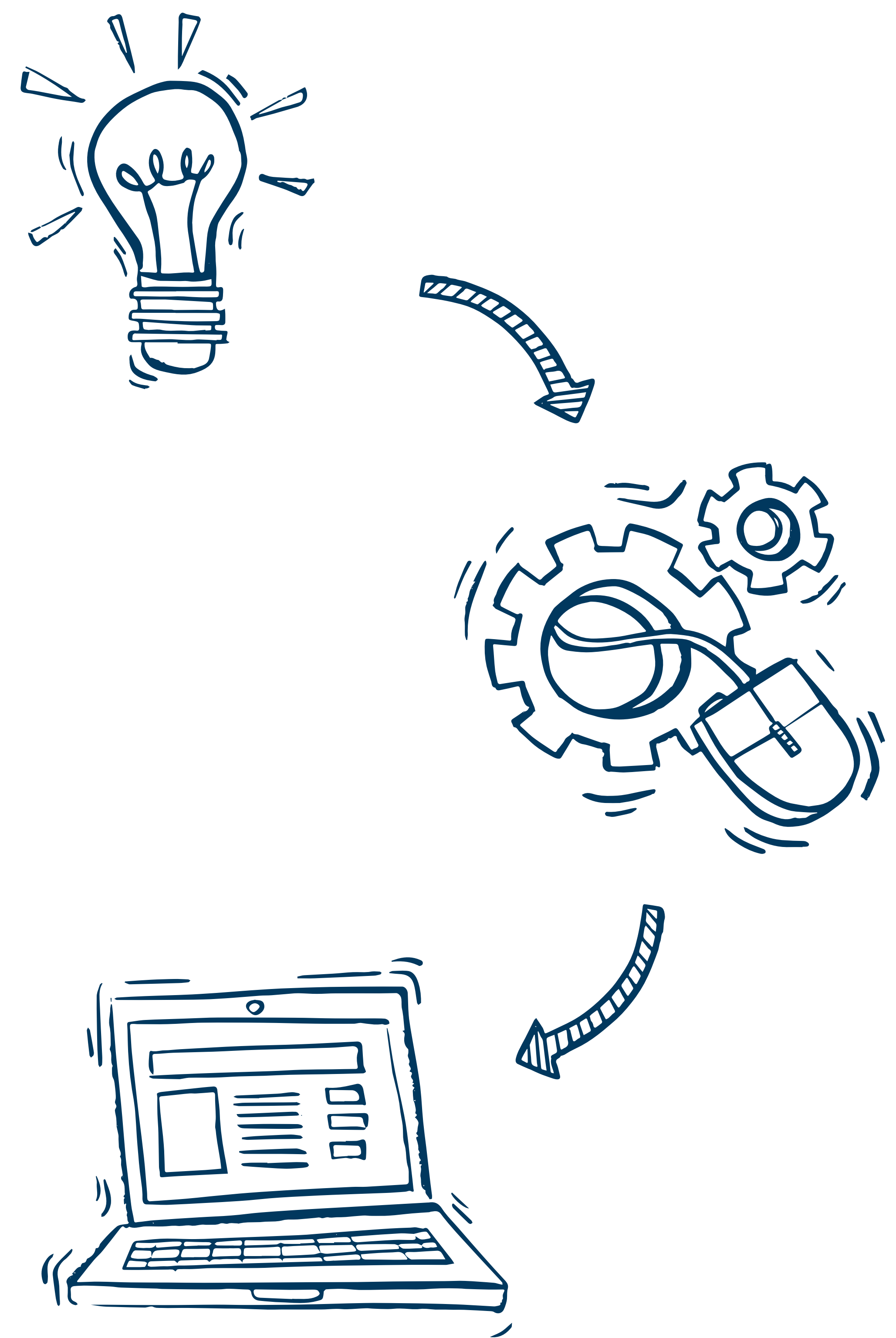
Think of it like this:

You have bits and pieces of information scattered across different spreadsheets, systems, and notebooks,. You decide to gather them all into one single, organized Data Warehouse.

This means your finance data, customer feedback, sales figures, marketing metrics, and everything else lives together in harmony.

Everything you needs to make informed decisions in your business, right there at your fingertips, making your life easier and your decisions smarter.

No more chaos, just clarity.



✓ APIs

APIs are the next tool to learn.

You want to identify how to connect all our data sources to the Cloud Data Warehouse.

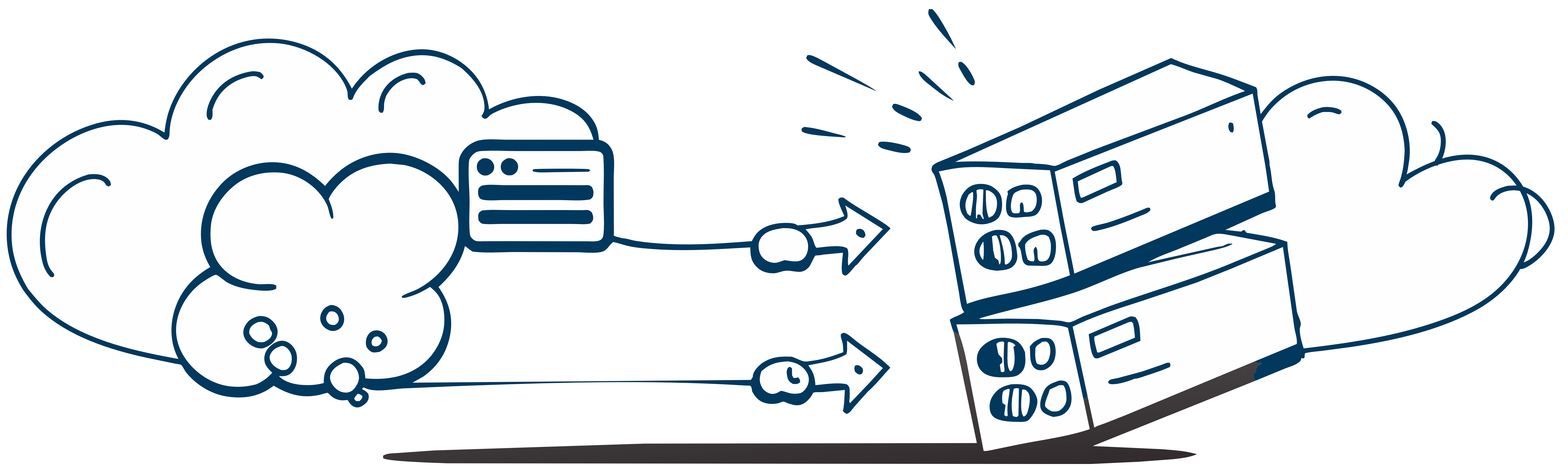
Most of your data will connect through something called an API (Application Programming Interfaces). With an API, you can automatically pull in data from various sources without lifting a finger.

Think of it like this:

Imagine having a smart assistant that does all the heavy lifting for you.

This means less time spent on tedious data entry and more time focusing on what really matters—analyzing and making decisions.

APIs streamline the process, ensuring your data is up-to-date and accurate, all while saving you time and hassle.



Real-World Example

Let's say you're running an e-commerce business.

You have sales data in one system, customer feedback in another, and inventory levels in yet another. It's a nightmare to make sense of it all.

But with your new simple data collection method, you centralize everything in a cloud data warehouse. You automate data collection using APIs, ensuring real-time accuracy. You regularly audit the data quality and set up a user-friendly dashboard.

Now, you can see sales trends, customer satisfaction, and inventory levels all in one place. Decisions become data-driven, and your business thrives.

Congrats, you're a star. Your colleagues envy you and your friends want to be you.



You've now successfully:

- ✓ Listed all your data sources
- ✓ Researched how to connect those data sources to your Cloud Data Warehouse via APIs.

Step 2

YOUR CLEVER DATA STORAGE SOLUTION

Now that we've accomplished Step 1, we need to address the elephant in the room:

"Where does all our data actually go?"

In your Cloud Data Warehouse, right?

But now what?

And why the "Cloud"?

Allow me to be bluntly opinionated here: Cloud Storage is the #1 data storage solution.



It's the go-to choice for modern businesses, and here's why:

- ✔ Cloud Storage means your data isn't tied down to physical hardware.
- ✔ This gives you the flexibility to access your data anytime, anywhere.

Cloud Storage allows you to pull up critical business data whether you're in the office, at home, or halfway around the world.

5 KEY



Benefits of Cloud Storage:

- ✓ Scalability
- ✓ Accessibility
- ✓ Cost-Effective
- ✓ Maintenance-Free
- ✓ Security



Scalability

As your business grows, so does your data. Cloud storage grows with you. Need more space? Just upgrade your plan. No more buying and setting up new hardware.



Cost-Effective

Traditional storage needs a lot of upfront money and ongoing maintenance. With cloud storage, you only pay for what you use. It's like a storage unit that changes size based on your needs. You pay for what you need. Simple.



Security

Cloud storage providers spend a lot on security. Your data is encrypted and stored in secure data centers. Regular backups and disaster recovery options keep your data safe from loss or attacks. The cost savings are significant, and the security is top-notch.



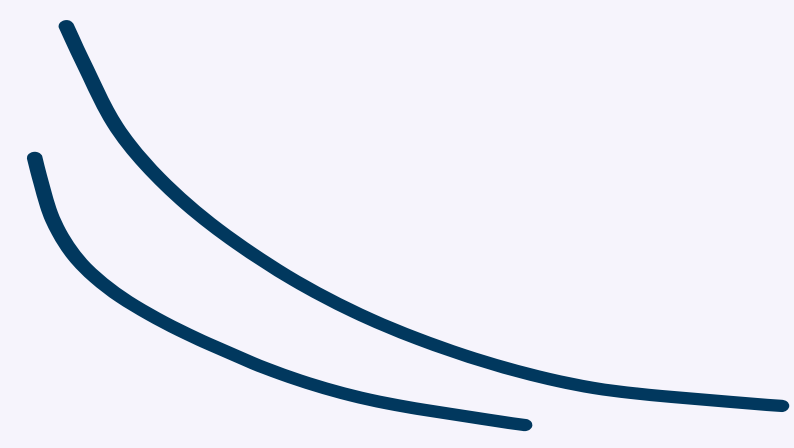
Accessibility

Access your data from anywhere with an internet connection. Collaborate with team members across the globe in real-time. Cloud storage makes remote work easy and efficient.



Maintenance-Free

Forget about maintaining physical servers. Cloud providers handle all the technical upkeep, so you can focus on running your business.



You're probably
saying to yourself



"Okay, great. I'm sold!"

... so how does it work?

Here's the simple version:

- You upload your data to the cloud provider's servers via the internet.
- This data is then stored across multiple servers in different locations, ensuring it's safe and reliable.
- You access, update, and manage your data through an easy-to-use interface, like a web browser or app.
- If you remember nothing from this chapter except the following 3 sentences, you will still be OK:

- ✓ Cloud storage is a must for modern businesses.
- ✓ It's scalable, cost-effective, secure, and accessible.
- ✓ By using cloud storage, you manage your data efficiently and effectively.

Step 3

YOUR DATA, YOUR RULES

Now that you've got your data safely stored in a Cloud Data Warehouse, it's time to take control.

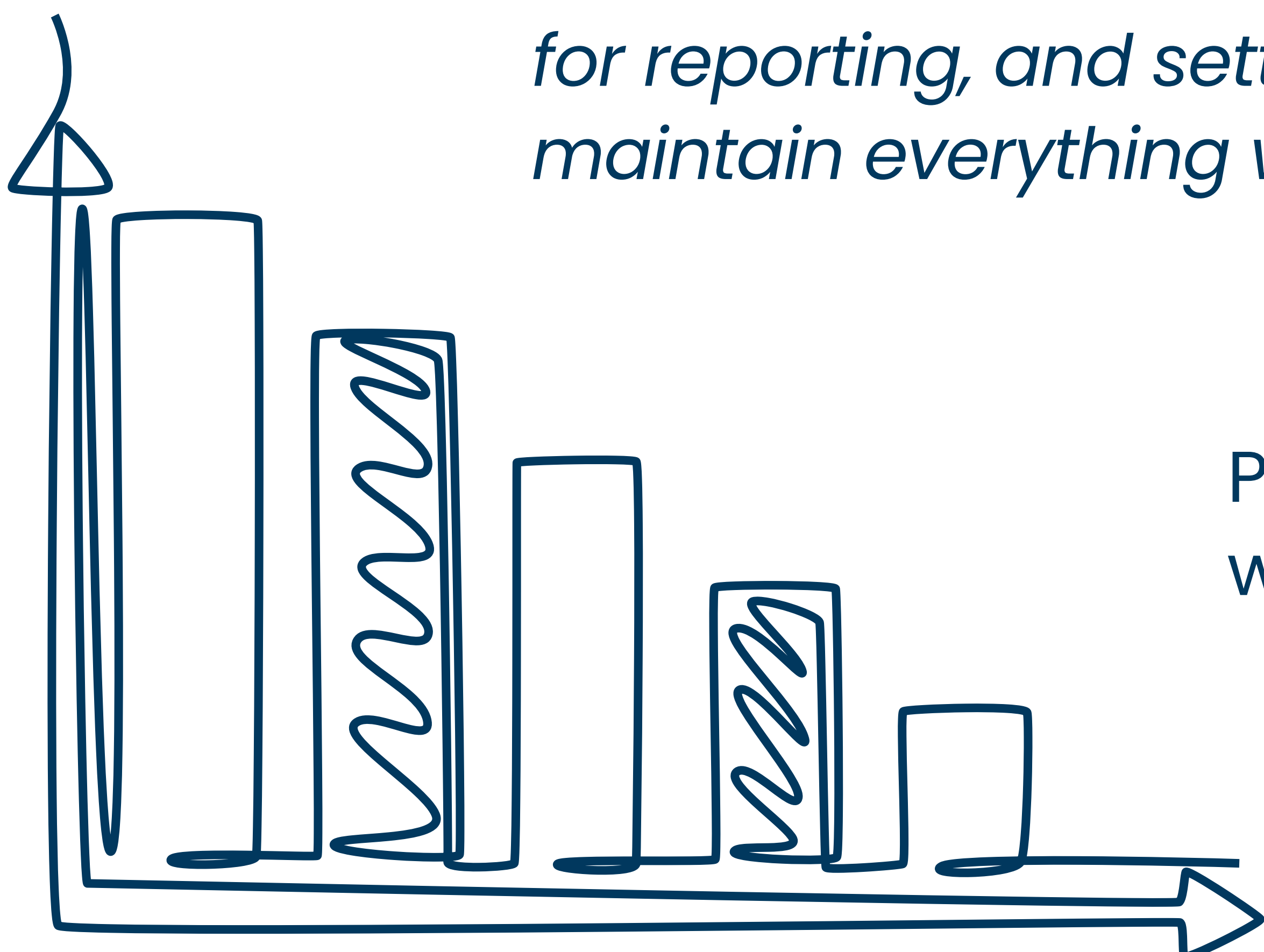
You don't just collect data and dump it there.

—you want to organize, transform, and make it actionable. Think of your data like clay.

It's time to shape it into something useful.

In this step, we're talking about **Orchestration**

Orchestration is "The art of building data pipelines to move your data from various sources into your warehouse, transforming it so it's ready for reporting, and setting up automated systems to refresh and maintain everything without you having to lift a finger."



PS: This is where you go from "being dangerous" with your data to "being unstoppable".

Building Pipelines from Source to Warehouse

You've got data streaming in from all over:

Sales Platforms, Customer Service Systems, Marketing Tools, and maybe even a random Excel spreadsheet or two.



To make any sense of all that data,

you need it to flow from those sources into your Cloud Data Warehouse efficiently.

That's where **pipelines** come in.

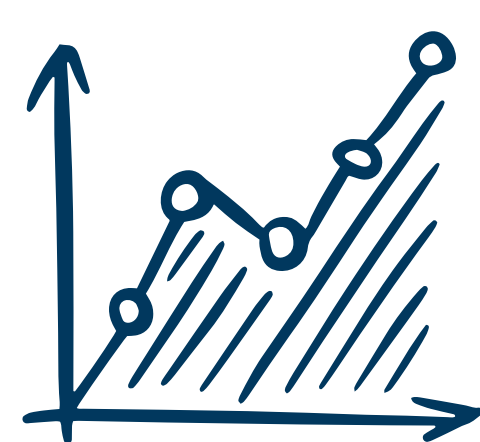
Think of pipelines like highways. They take data from Point A (your source systems) to Point B (your data warehouse). But instead of rush hour traffic, these highways are fast, smooth, and automated.

The 3 Pillars of a Good Data Pipeline:



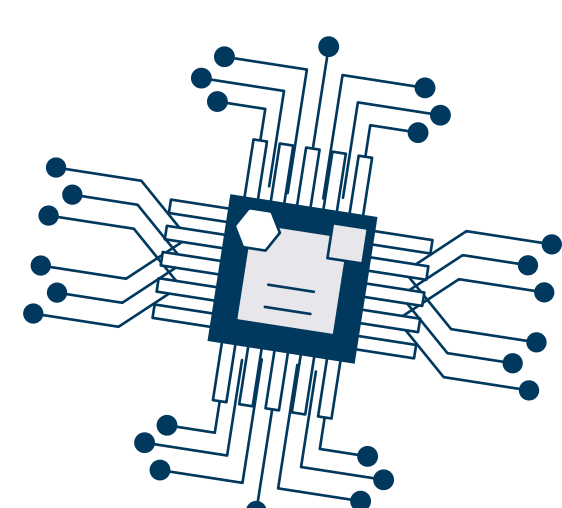
Reliability

You need your data to arrive intact every time, without missing bits and pieces.



Scalability

As your business grows, your pipeline should be able to handle increasing data loads without breaking a sweat.



Automation

The less manual intervention needed, the better. Set it up once, and let the pipeline do its thing.

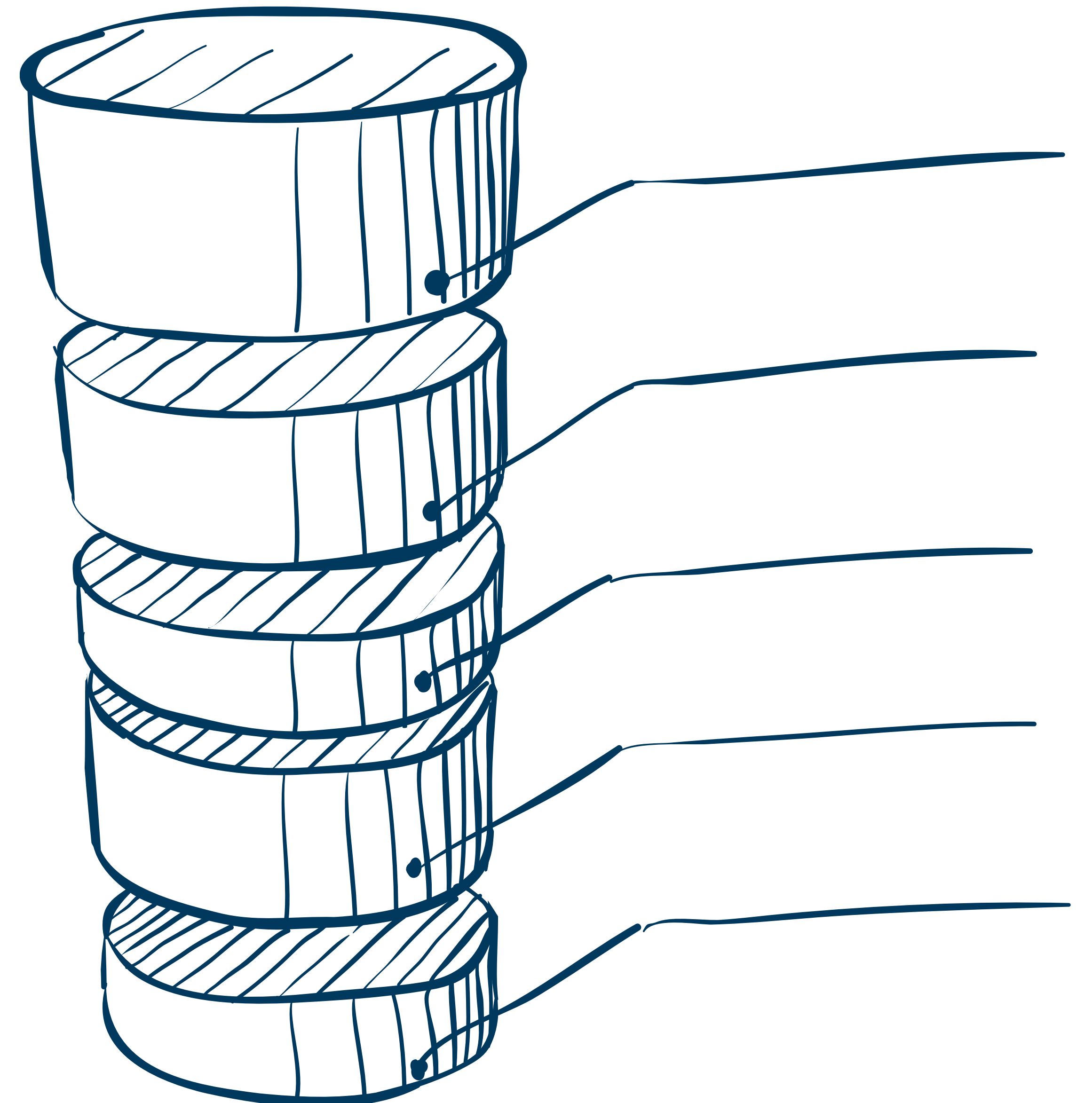
Building Pipelines

ETL (Extract, Transform, Load):

The backbone of any data pipeline.

**You extract data from
your sources,**

transform it into a usable format,
and load it into your warehouse.



API Pipelines

Use APIs to continuously pull data from
your source systems into your warehouse.

No more waiting

on manual exports—let the data flow
in real-time.

Transforming Your Data for Reporting

Now that your data is safely in the warehouse, the next step is transformation.

The data you've just collected is raw, meaning it's messy and may have errors.

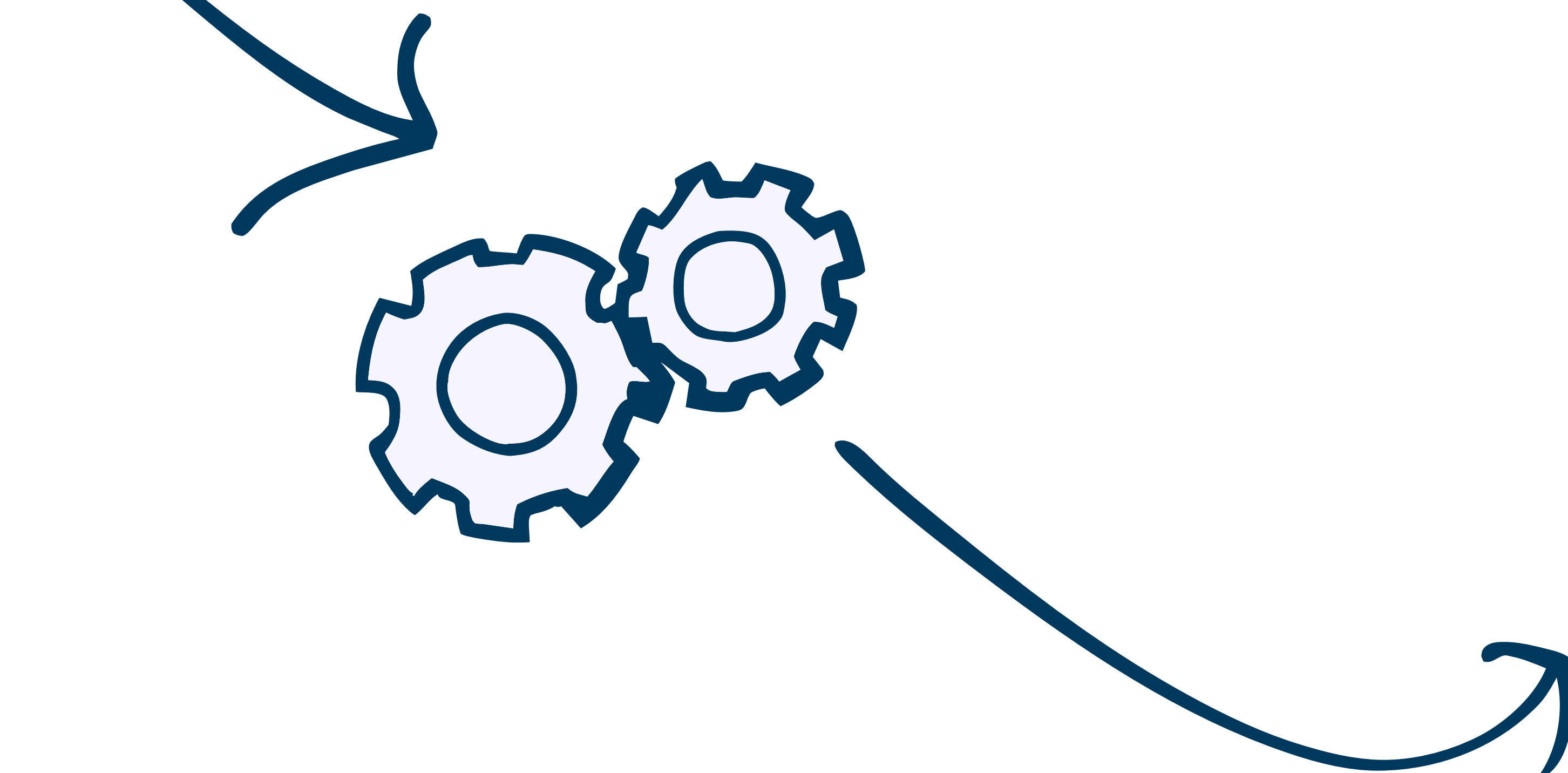
Transformation is where you clean it up, fix any issues, and organize it so it's ready for analysis.

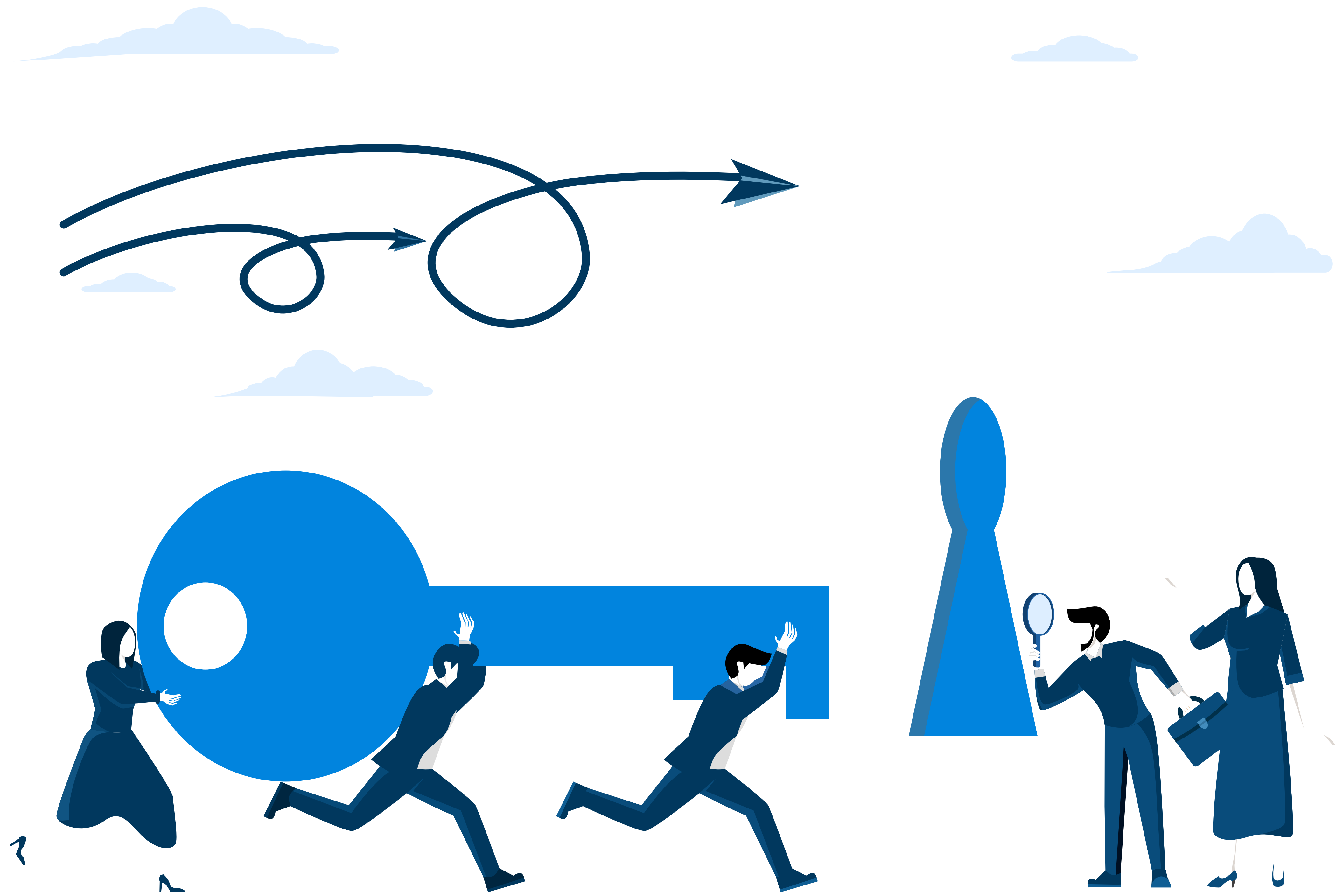


Raw data is like **unfiltered water.**

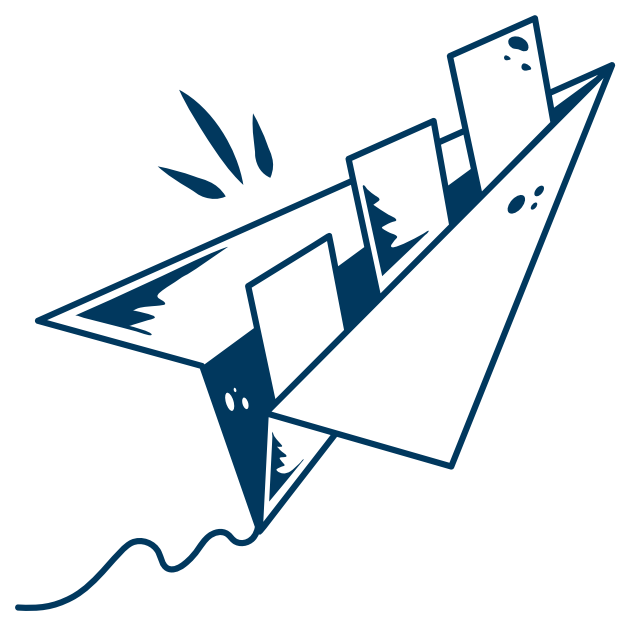
You wouldn't drink it straight from the river, right? You need to clean and process it before it's useful.

This is where you turn chaotic, messy data into clean, structured data that's ready for reporting





5 Key Concepts of Data Transformation:



Preserving Raw Extracts:

Never mess with the original data. Keep it stored as-is so you always have a clean version to fall back on. This raw data is your “source of truth.”



Building 3 Layers of Transformation:

Think of your data like an onion. You need to peel away the layers until you get to what’s actually useful. In data terms, this means applying filters, calculations, and formatting.



Raw Layer:

The untouched data.





Staging Layer:

This is where you clean, filter, and standardize your data. Remove duplicates, fix inconsistencies, and get rid of junk entries.



Reporting Layer:

This is the final version—data that’s been summarized, aggregated, and structured for your specific reports.

Think of it like this:

Let’s say you run an online store.

Your raw data might include a messy dump of order details—some fields are missing, customer names are spelled differently, and dates aren’t consistent.

In your staging layer,



you clean all this up,

standardizing customer names, fixing date formats, and removing invalid entries.

By the time it hits the reporting layer, you’ve got clean, structured data, and you can easily generate reports on total revenue, top-selling products, and average order value.



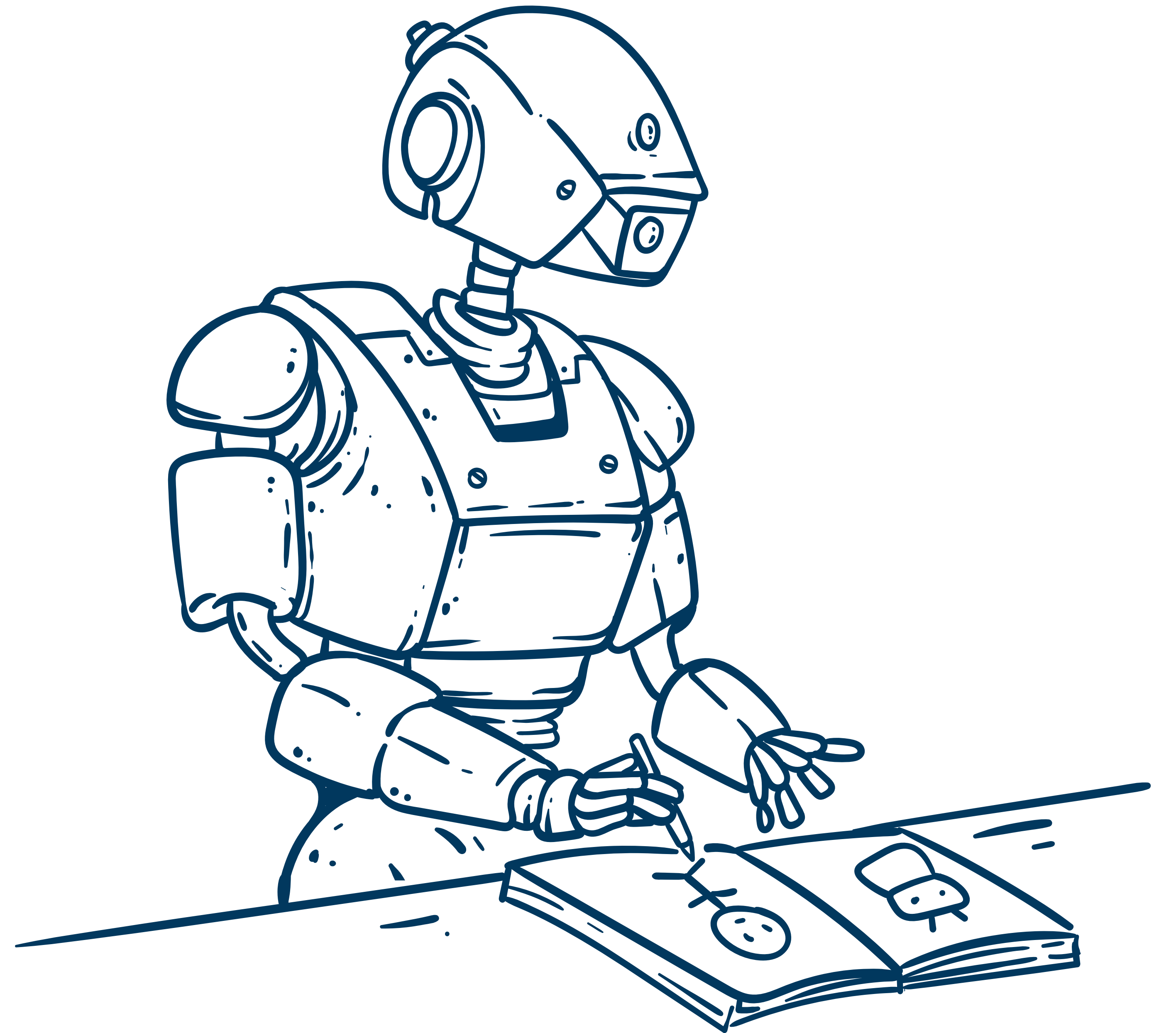
Automating Data Refreshes

Now, let's talk about one of the most powerful weapons in your data arsenal: **Automation**.

Nobody wants to waste hours

manually updating reports, checking for new data, or rerunning queries.

Instead, you need your data to refresh automatically, always showing the latest information without you having to do a thing.



Here's how you make that happen:



Scheduled Jobs

Set up scheduled tasks that automatically pull new data into your warehouse at regular intervals—daily, hourly, or even in real-time if needed.



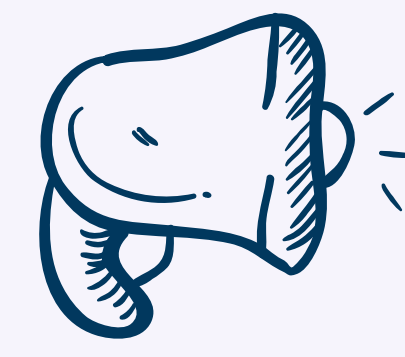
Incremental Loads

Instead of pulling in all the data from scratch every time (which can be slow and inefficient), set up incremental loads. This means only new or updated data is loaded into the warehouse.



Automated Transformations:

With each data refresh, you can automate the transformation process, applying all your cleaning and formatting steps without manual intervention.



Alerting:

Set up alerts that notify you if something goes wrong—like if data didn't load properly or if a pipeline fails. This ensures you're always in the loop without having to babysit the system.

The Reporting Layer

Once your data has been transformed and your refresh processes are automated, you need to make it actionable.

The **Reporting Layer** is where everything comes together.



Think of it like the front line

—the place where data meets decision-making.

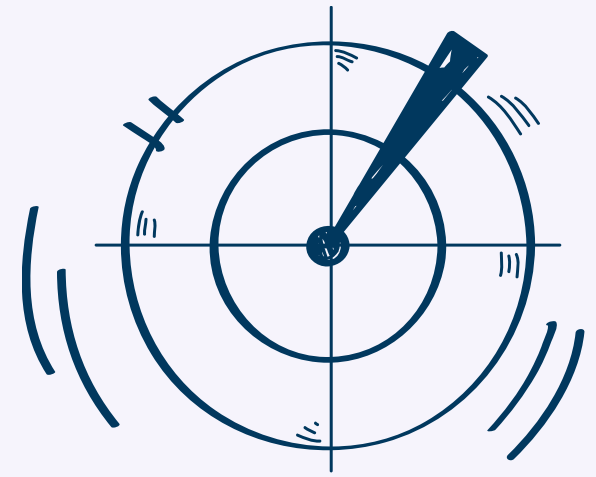
In this layer, you've got data that's not only clean and structured but also optimized for fast querying and reporting.

Here's what makes this layer so crucial:



Performance:

You've designed this layer to handle large queries without slowing down your reports. It's fast, responsive, and ready for action.



Accuracy:

Every piece of data in this layer has been validated, cleaned, and transformed to give you accurate insights.



Customization:

Tailor this layer to meet your specific reporting needs. Whether you need to track daily sales, monthly revenue trends, or customer churn, this layer gives you exactly what you need.

Real-World Example:

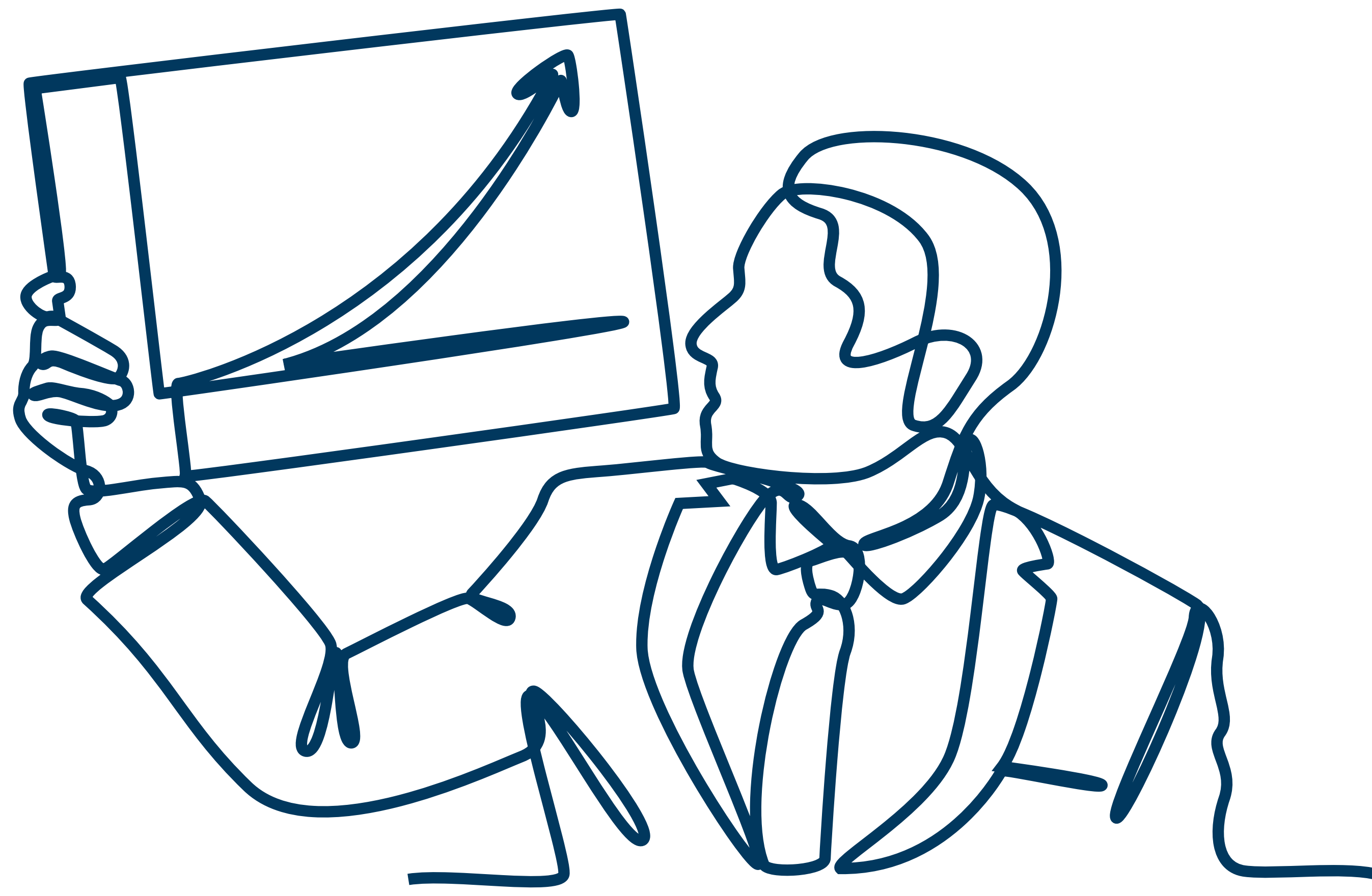
You've got a retail business with hundreds of stores.

You've set up a final reporting layer that allows you to pull up reports on a store-by-store basis.

You can see revenue trends, inventory levels, and customer satisfaction scores for each location.

And because everything is automated, the data refreshes every morning, giving you the latest insights without having to manually update anything.





Own Your Data

You've done it—you've built pipelines, transformed your data, and automated the entire process. Now, the data is in your hands, and you set the rules.



No more chaos.

No more guessing. You've got a powerful system that delivers accurate, up-to-date insights every time.

It's time to get your business to **run on data, not gut feelings**. You've gone from being overwhelmed to being the master of your data universe.

Let's take the final step and visualize your data, start telling stories, and identifying trends.

Step 4

YOUR DATA ANALYTICS, SIMPLIFIED

Alright, you've got your data all cleaned up, stored neatly in your Cloud Data Warehouse, and pipelines flowing like a well-oiled machine.

Now what?

It's time to analyze that goldmine of data. This is where you turn those raw numbers into insights that actually mean something.

The goal isn't just to crunch numbers—it's to **answer real business questions** and **make smarter decisions**.



But let's get honest for a second...

Data Analytics can seem like black magic.

Tons of businesses are drowning in data but starving for insights because they don't know what the hell to do with all the information they've collected.

I'm here to make it simple.

Ready? Let's go.

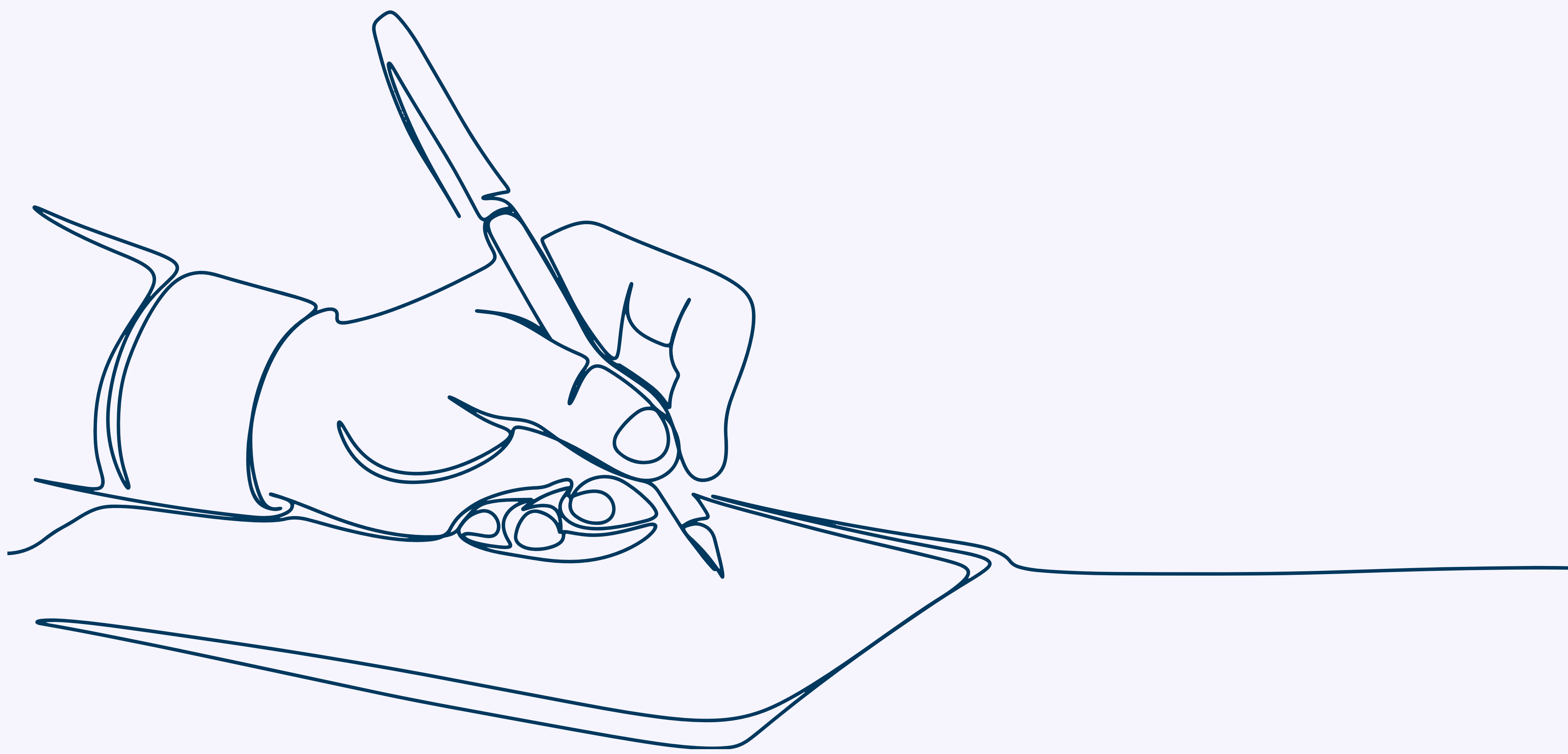


Focus on What Matters: Your KPIs

You've probably heard the term **KPI** thrown around, but what does it actually mean?

A **Key Performance Indicator** (KPI) is just a fancy way of saying "the numbers that matter most to your business."

Instead of getting overwhelmed by a sea of data points, **laser-focus** on the ones that directly impact your business goals.



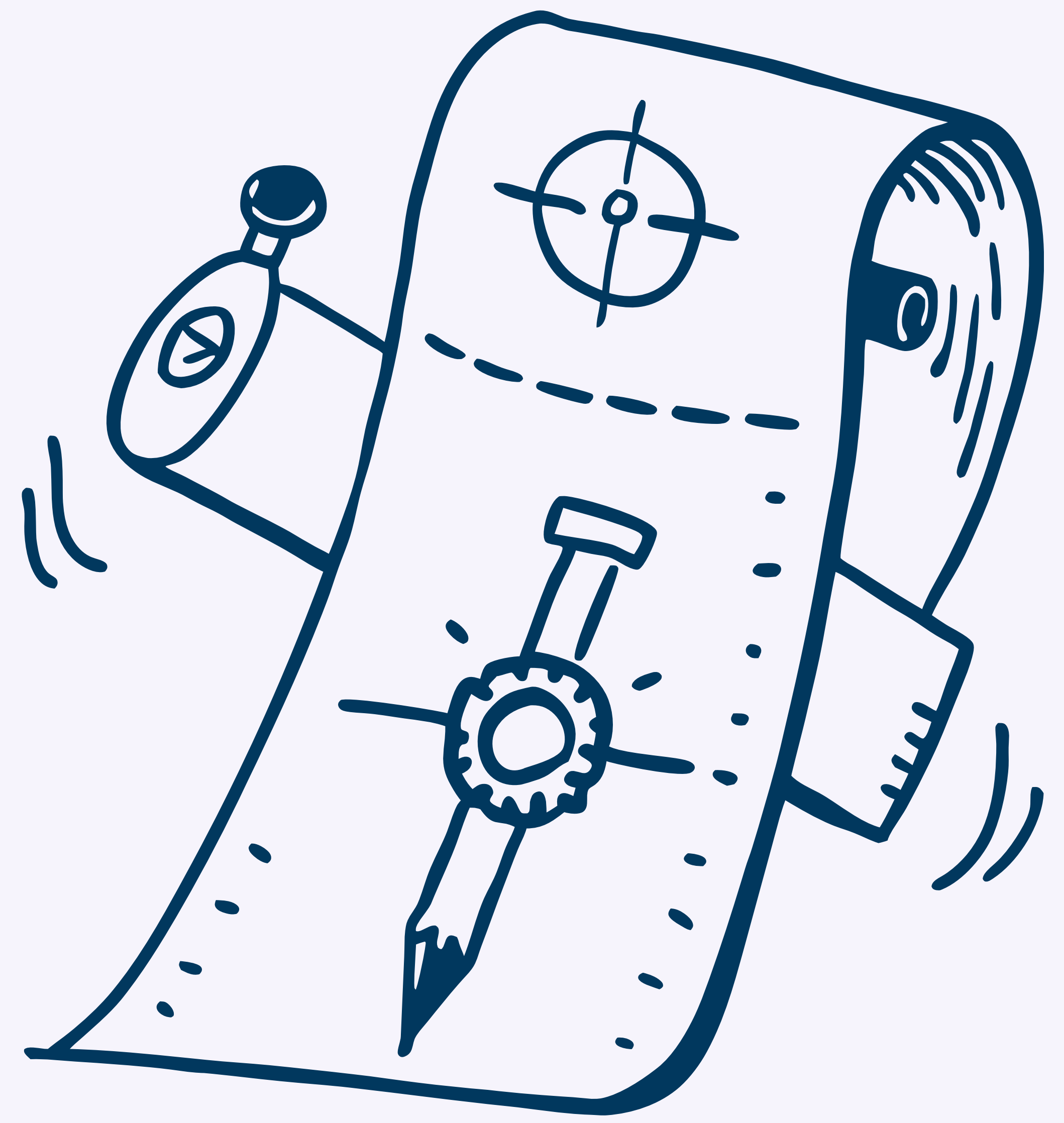
Your KPIs should answer questions like:

- ✔ How much revenue did we generate last month?
- ✔ What's our customer retention rate?
- ✔ Which marketing channels are driving the most sales?

By zoning in on the metrics that matter, you'll avoid drowning in useless data.

The Golden Rule of KPIs:

**“Only track what
moves the needle.
Everything else
is noise.”**



Real-World Example:

If you run an e-commerce business, your KPIs might be:

✔ **Revenue per Customer:**

How much, on average, is each customer spending?

✔ **Conversion Rate:**

What percentage of website visitors actually buy something?

✔ **Customer Acquisition Cost (CAC):**

How much are you spending to bring in each new customer?

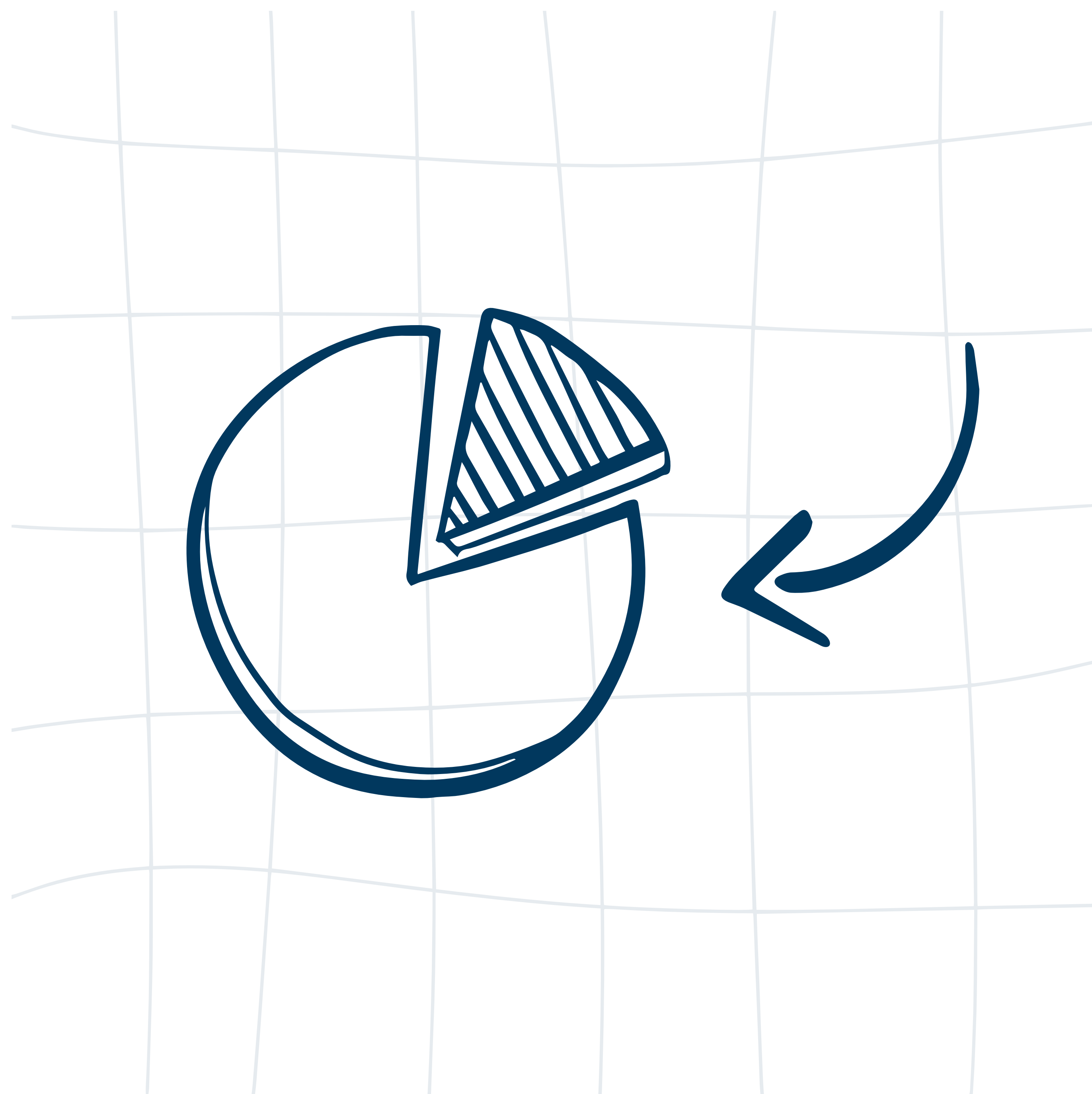
Once you've identified your KPIs, you've got a North Star for your analytics.
It's like cutting through the fog and seeing what's actually driving your success.

Data Visualization: Turn Numbers into Stories

Nobody likes staring at rows and rows of data in a spreadsheet.

You need to **see** the story your data is telling,... and that's where **data visualization** comes in.

Think of **visualization tools** as a way to take raw data and turn it into something that makes sense at a glance.



Graphs, Charts, and Dashboards make it easier to see:

- Unusual Data Points
- Patterns
- and Potential Opportunities.

Instead of scrolling through long tables of numbers, these visual tools let you quickly understand important insights.

Let's talk about the most useful, cost effective tool that accomplishes these needs on the next page...

The #1 Tool You Can't Live Without:



Power BI:

Microsoft's analytics tool, ideal for businesses already in the Microsoft ecosystem.

It's cost-efficient, easy to maintain, and used by **97%** of Fortune 500 companies.

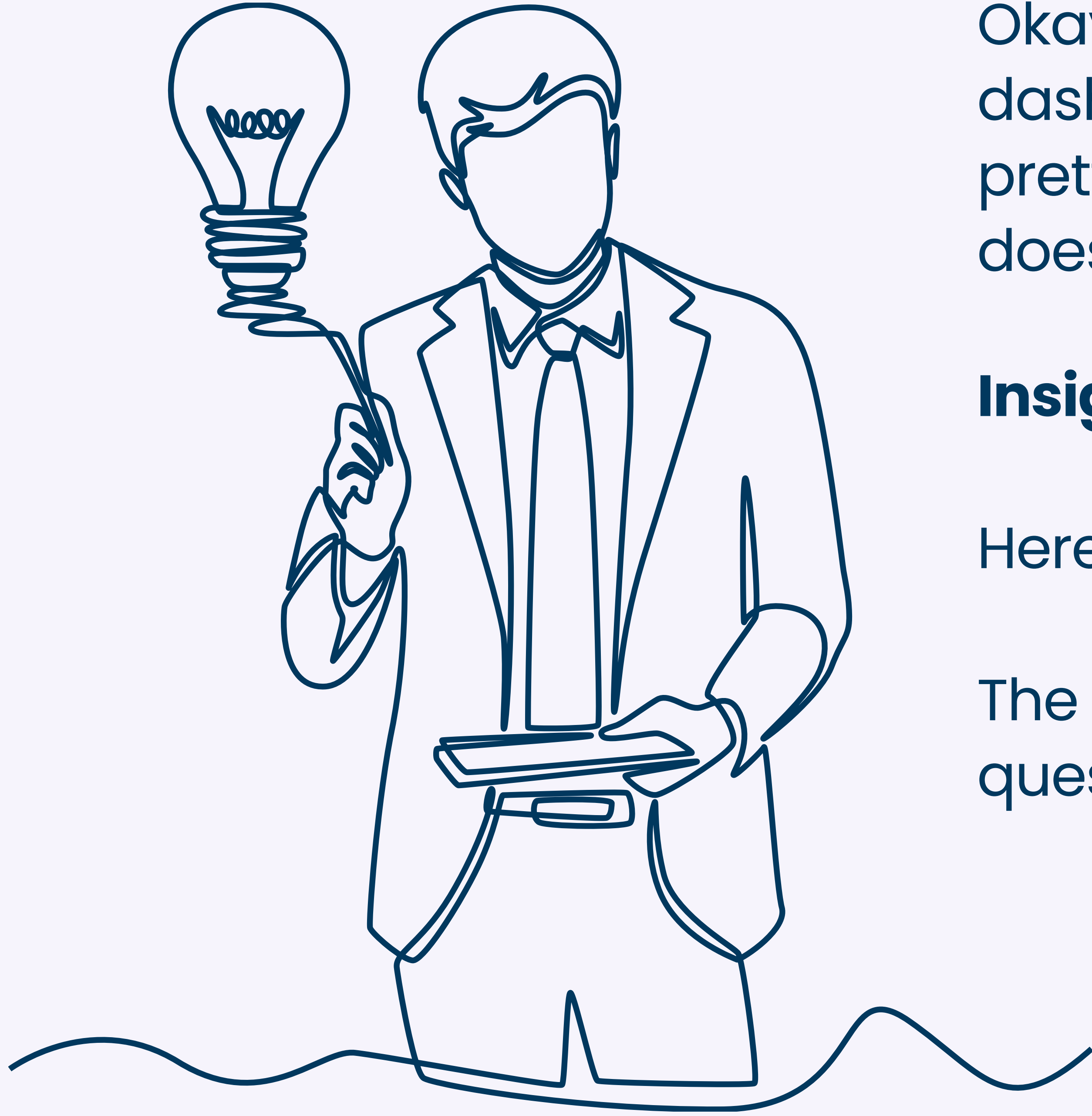
Real World Example:

Let's say you've got a retail business. You're tracking daily sales, customer foot traffic, and product returns. A line graph can show you your sales trend over the last six months, while a bar chart can compare foot traffic by store location.

Suddenly, you notice foot traffic is down 20% at one store, but returns are up by 30%. There's your clue—you need to investigate what's happening at that location.

With **Data Visualization**, you're not just staring at numbers—you're reading the story your data is telling you.

From Raw Data to Actionable Insights



Okay, so you've identified your KPIs, built a killer dashboard, and now you're staring at a bunch of pretty graphs. But the big question is: what the hell does it all mean?

Insights are what turn data into action.

Here's the secret: **Don't Over Complicate It.**

The whole point of analytics is to answer real business questions, not to drown in analysis paralysis.

The Process of Getting Insights:

✓ Ask the Right Questions:

What are the critical things you need to know?

Maybe it's which products are under-performing or why customer churn is increasing.

✓ Dive into the Data:

Pull the relevant reports, look at the trends, and get granular with your analysis.

✓ Turn Insights into Action:

Every insight should lead to a decision or action. Maybe it's launching a new marketing campaign, cutting underperforming products, or investing in better customer support.



Real World Example:

You run a subscription-based business, and customer churn is your biggest headache.

You dive into the data and notice that most cancellations happen within the first three months of sign-up.

After further investigation, you realize customers who received the “Welcome S.O.P.” from customer support have a 50% lower churn rate.

Insight unlocked—now, you take action and ensure every new customer gets that personal “Welcome S.O.P.”

Automate Your Analytics

Here’s the thing: you don’t want to spend all day running reports. You’ve got better things to do—like running your business, right?

This is why

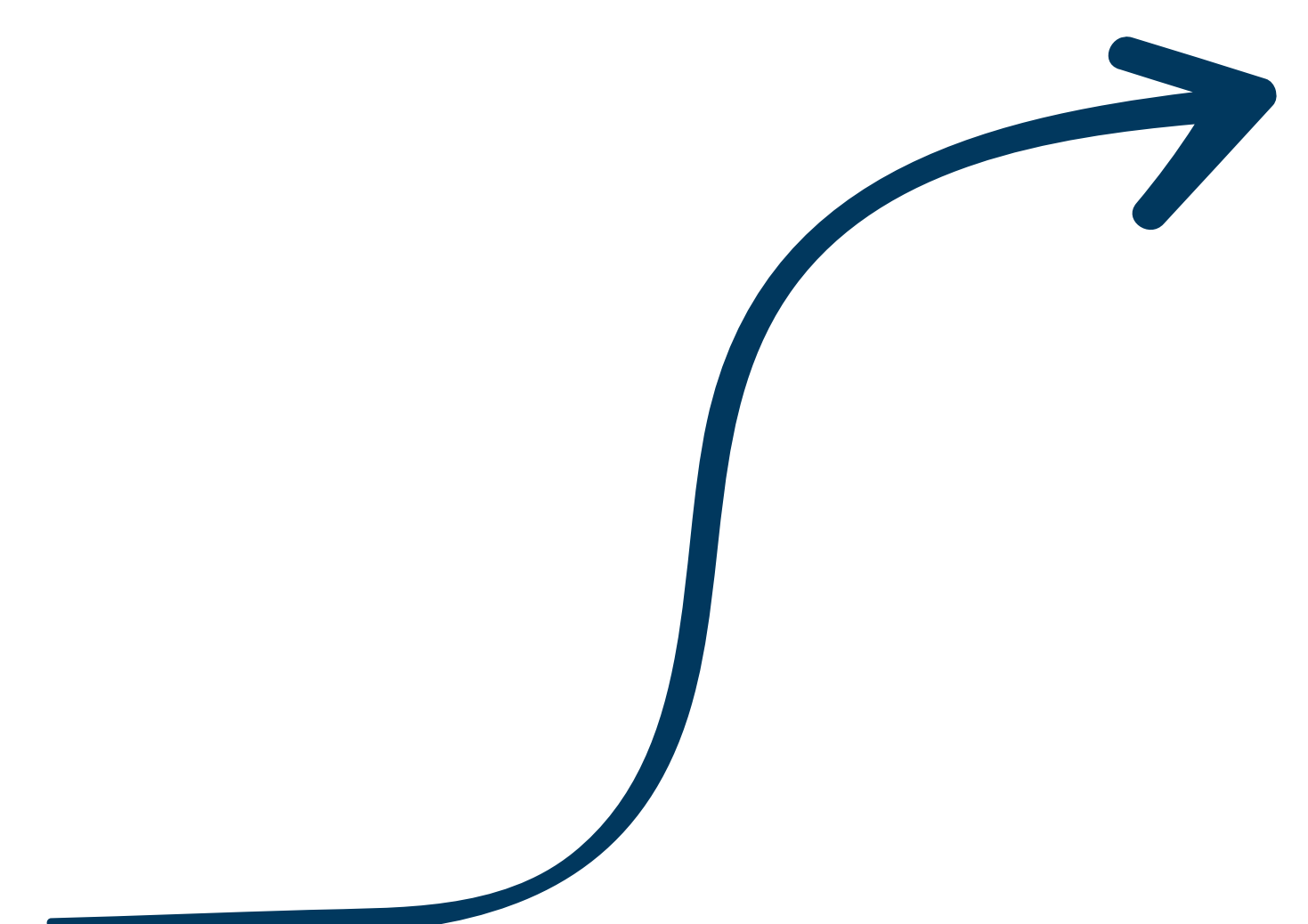
Automating your analytics is a game-changer

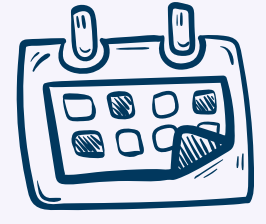


You’ve already built the automated pipelines and set up your warehouse.

Now, let’s set up **automated reports** that refresh on their own.

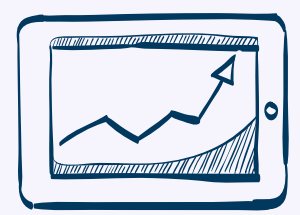
This way, you’ve always got up-to-date data without ever lifting a finger.





Schedule Reports:

Set up reports that automatically update every day, week, or month—whatever makes sense for your business.



Auto-Refresh Dashboards

Power BI can pull in fresh data automatically, so your dashboards are always current.



Alert Systems:

Some tools allow you to set thresholds or alerts.



Real World Example:

Let's say you own a SaaS company and track customer acquisition cost (CAC) closely.

You set up an automated report that refreshes daily and sends you an alert if your CAC crosses a certain threshold.

One morning, you get an alert—CAC has spiked 20%. You dive into the dashboard and discover that a new marketing campaign is driving clicks, but not conversions.

Now, you can course-correct immediately.



Make Data Your Secret Weapon

Here's the bottom line: **data analytics isn't about being fancy—it's about being smart.**

It's about using the information you already have to make better decisions, faster. The simpler you make it, the more powerful it becomes.

With your KPIs locked down, dashboards in place, and automated reports humming along, you're ready to go from reactive to proactive. You'll know what's working, what's not, and what needs to change, all in real-time.

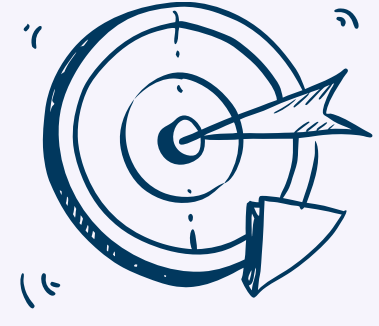
Congrats—you simplified your data & you run your business like a pro.

You are now ready to fill out your 1-Page Data Plan.

This **1-Page Data Plan** breaks down the process of transforming your business into a data-driven powerhouse.

By following this plan, you'll ensure that your data is no longer a source of confusion, but a strategic asset that drives smarter decisions and fuels business growth.

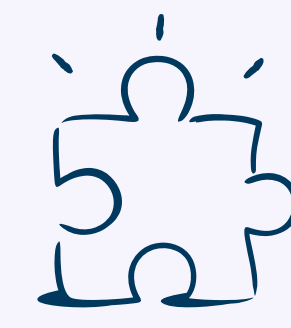
My 1-Page Data Plan (Example)



1. My Target Market

Who is it for?

- Business Departments struggling to make sense of their data or looking to become data-driven but lack a streamlined system.
- Decision-makers in companies who want to use data to drive smarter decisions, improve operational efficiency, and uncover growth opportunities.



2. My Business Problem(s)

What is the problem your data plan solves?

- Disorganized data spread across different systems.
- Inconsistent, inaccurate data that is hard to trust.
- Inability to gain actionable insights from available data, resulting in poor decision-making and missed opportunities.

3. My Data Solution

How does your data plan solve the problem?

- Centralizes all data in one secure, easy-to-manage cloud data warehouse.
- Automates the collection and synchronization of data from various sources using APIs.
- Organizes the data into structured layers (raw, staging, reporting) that ensure clarity and accessibility.
- Visualizes key business metrics (KPIs) for easier decision-making and identifies actionable insights.



4. My Benefits

What benefits will businesses experience?

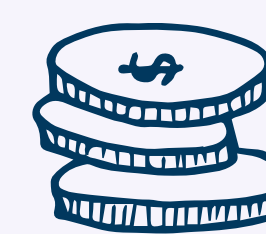
- A single, reliable source of truth for all data.
- Streamlined decision-making backed by accurate, real-time data.
- Time saved by automating data collection, transformation, and reporting.
- Clearer insights into business performance, leading to smarter business strategies and increased profitability.



5. My Execution Plan

What are the steps to execute your data strategy?

- **Collect:** Identify all your data sources and connect them to your cloud data warehouse.
- **Transform:** Clean and organize your data using automated pipelines and multi-layer transformations (raw, staging, reporting).
- **Analyze:** Set up dashboards and reports to visualize key business metrics (KPIs).
- **Automate:** Create automated schedules to refresh data, keeping everything up-to-date without manual effort.
- **Act:** Use the insights from your analytics to make data-driven decisions and continuously optimize your operations.



6. My Tangible Costs

What are the costs involved?

- **Software tools:** Subscription costs for cloud data warehouses (e.g., Azure, Snowflake, Google BigQuery), ETL tools (e.g., Fivetran, Stitch), and analytics platforms (e.g., Power BI, Tableau).
- **Development and setup:** Time and effort to implement pipelines, automation, and dashboards (could be internal or outsourced depending on resources).
- **Ongoing maintenance:** Costs associated with managing and updating the system, ensuring data quality, and refining reporting as business needs evolve.



7. My Very Real Objections

What could stop you from implementing this plan?

- **Fear of data complexity:** Many businesses feel overwhelmed by the idea of data integration and transformation.
- **Upfront costs:** Implementing a comprehensive data solution can have initial setup and subscription costs.
- **Resistance to change:** Teams may be hesitant to adopt new systems or rely on automated processes instead of manual work.

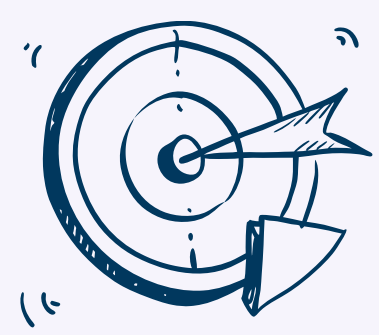


8. My First Step

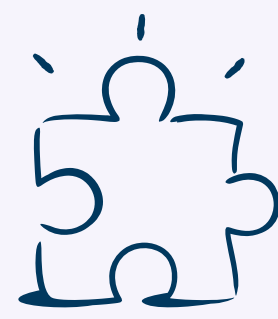
What's the first step?

- Start by identifying your data sources and mapping out the systems you need to connect.
- Identify who can help you implement a Cloud Data Warehouse to centralize your data and ensure you have a reliable foundation.
- Identify who can help you automate data collection, transformation, and to build out your dashboards to visualize & report on your KPIs.

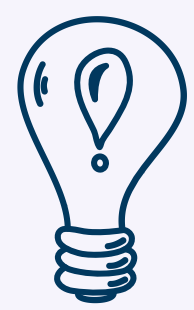
My 1-Page Data Plan



1. My Target Market



2. My Business Problem(s)



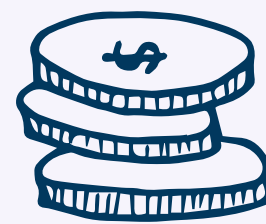
3. My Data Solution



4. My Benefits



5. My Execution Plan



6. My Tangible Costs



7. My Very Real Objections



8. My First Step