DATA-DRIVEN METHOD

90-Day Data Roadmap Implementation Checklist

Transform Your Service Business with Data-Driven Decisions

Getting Started

My Start Date: _____ **Target Completion:** _____

Weekly Review Day & Time: _____

Data Steward (if not you): _____

Overview: Your 90-Day Journey

Phase 1 (Weeks 0-4): Foundation - Establish baseline data collection
Phase 2 (Weeks 5-8): Analysis - Identify patterns and select improvement lever
Phase 3 (Weeks 9-12): Systematization - Streamline processes and delegate

Phase 1: Foundation (Weeks 0-4)

Week 0 - Set the Baseline

☐ Download Core Tracking Sheet template from datadrivenmethod.io/resources
☐ Enter last 30 days of data manually (allow 2-3 hours)
☐ Identify three metrics currently requiring action
☐ Define your custom target/caution/action ranges for key metrics
☐ Schedule recurring 15-minute Weekly Review meetings for next 12 weeks

Notes:

_____

Week 1 - Log Existing Metrics

☐ List every metric you can pull from current tools (no new setups required)
☐ Begin daily data entry for available metrics
☐ Note obvious gaps in data collection
☐ Conduct first Weekly Review meeting
☐ Document initial observations

Key Insights:

_____

Week 2 - Fill First Gap

☐ Choose one workflow to improve (e.g., add job-category tags to accounting)
☐ Implement the workflow angech
☐ Test new data collection for one week
☐ Verify team is using new process correctly
☐ Weekly Review: assess new data quality

Workflow Improved:

_____

Week 3 - Fill Second Gap

☐ Select second workflow improvement (e.g., time-tracking for scope-creep)
☐ Implement second workflow change
☐ Monitor both new processes for consistency
☐ Weekly Review: identify any early trends
☐ Prepare for Week 4 checkpoint

Second Workflow Improved:

_____

Week 4 - Stabilize & Freeze

☐ Ensure all chosen metrics have reliable capture methods
☐ Freeze process changes (no more tweaks until Week 9)
☐ Validate four-week data set is complete
☐ Complete Phase 1 Checkpoint Assessment (below)
☐ Prepare for analysis phase

Phase 1 Checkpoint Assessment

Rate each area from 1-5 (5 = excellent):

- Data collection reliability: ___/5
- Team adoption of new processes: ___/5
- Completeness of chosen metrics: ___/5
- Weekly Review meeting effectiveness: ___/5

Overall Phase 1 Success: ___/20

What's working well:
_____

What needs attention:
_____

Phase 2: Analysis & Decision (Weeks 5-8)

Week 5 - Plot Trends

☐ Create trend lines for each metric over 4-week period
☐ Identify which metrics show clear direction (up/down/flat)
☐ Note metrics with insufficient data (less than 30 data points)
☐ Weekly Review: discuss trend observations
☐ Document initial insights

Strongest Trends Identified:
_____

Week 6 - Root-Cause Analysis

☐ Schedule 30-minute brainstorming session
☐ List possible improvement levers for action-required metrics
☐ Gather evidence supporting each potential lever
☐ Prioritize levers by impact and effort required
☐ Weekly Review: select top 2-3 levers for analysis

Top Improvement Levers:

    1. _____
    2. _____
    3. _____

Week 7 - What-If Analysis

☐ Run back-of-napkin calculations on top lever only
☐ Estimate risk and reward in one paragraph
☐ Consider constraints (cash, team capacity, client impact)
☐ Document confidence level (High/Medium/Low)
☐ Weekly Review: validate analysis assumptions

Selected Lever:
_____

Risk/Reward Summary:
_____

_____

Confidence Level: High / Medium / Low

_____

Week 8 - Go/No-Go Decision

☐ Make implementation decision based on confidence level
☐ If GO: document specific action plan and timeline
☐ If NO-GO: plan extended data collection or different lever
☐ Complete Phase 2 Decision Assessment (below)
☐ Prepare for systematization phase

Phase 2 Decision Assessment

□ Analysis based on 30+ data points per metric
□ Clear improvement lever identified
□ Risk/reward documented
□ Constraints considered

Final Decision: Implement / Extend Analysis / Choose Different Lever

Implementation Plan (if GO):
_____

Phase 3: Systematization (Weeks 9-12)

Week 9 - Map Workflows

□ Diagram current data collection process for each metric
□ Identify bottlenecks and time-consuming steps
□ List quick-win improvements (standardized naming, dropdown tags)
□ Assign workflow improvement owners
□ Weekly Review: approve workflow changes

Biggest Bottleneck Identified: _____

Owner Assigned:
_____

Week 10 - Test Improvements

□ Pilot one revised workflow (manual but streamlined)
□ Gather feedback from person collecting the data
□ Measure time savings and error reduction
□ Weekly Review: confirm pilot reduces effort without data loss
□ Document successful improvements

Time Savings Achieved:
_____

Feedback Summary:
_____

Week 11 - Document & Delegate

□ Create 1-page Standard Operating Procedure for successful workflow
□ Train team member or VA as Data Steward
□ Check Data Steward's first entries for accuracy
□ Weekly Review: celebrate reduced founder involvement
□ Note any SOP clarifications needed

Data Steward Trained:

_____

SOP Created For:

_____

Week 12 - Selective Automation

□ Identify high-volume, repetitive data collection tasks
□ Implement automation only where manual process is proven
□ Test automation with fallback manual method ready
□ Complete 90-Day Success Assessment (below)
□ Plan next quarter's focus area

Automation Implemented:

_____

90-Day Success Assessment

Overall Results

□ At least one metric moved from action to caution status
□ Weekly Review meetings established as routine
□ Data collection streamlined and partially delegated
□ Clear plan for next quarter's improvement focus
□ Team understands and supports data-driven approach

Key Metrics Improvement

Metric 1: _____ Before: _____ After: _____
Metric 2: _____ Before: _____ After: _____
Metric 3: _____ Before: _____ After: _____

Biggest Wins

1. _____
2. _____
3. _____

Lessons Learned

_____

_____

_____

Next Quarter Focus

Primary Goal:

_____

Target Metrics:

_____

Implementation Start Date:

_____

Resources & Support

Download additional resources: datadrivenmethod.io/resources

Need help? Contact support through the resource portal

For complete implementation guidance, the Data-Driven Method is available on Amazon and at datadrivenmethod.io