Data Strategy Assessment Checklist

Data strategy assessment checklist across 5 maturity dimensions. Use it to prioritize a 90-day roadmap and Decision Packs.

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Template Overview This assessment checklist helps you evaluate your organization's data maturity across key dimensions. Use it to identify gaps, prioritize improvements, and track progress over time. The checklist covers five core areas: • Data Strategy & Leadership • Data Governance • Data Architecture & Infrastructure • Analytics & Insights • Data Culture & Skills How to Use This Template • Schedule assessment sessions with relevant stakeholders • Rate each item using the maturity scale (1-5) • Document evidence for each rating • Identify patterns across dimensions • Prioritize improvements based on business impact • Repeat quarterly to track progress Maturity Scale: • 1 = Not started • 2 = Initial/Ad-hoc • 3 = Developing • 4 = Defined/Managed • 5 = Optimizing Template Content Section 1: Data Strategy & Leadership | | Assessment Item | Rating (1-5) | Evidence | Priority | |---|----------|----------|----------|----------| | 1.1 | Executive sponsor for data initiatives is identified | | | | | 1.2 | Data strategy is documented and communicated | | | | | 1.3 | Data strategy aligns with business objectives | | | | | 1.4 | Data investments are prioritized and funded | | | | | 1.5 | Data KPIs are defined and tracked | | | | | 1.6 | Data roadmap exists with clear milestones | | | | | 1.7 | Regular data strategy reviews occur | | | | Section Score: __ / 35 --- Section 2: Data Governance | | Assessment Item | Rating (1-5) | Evidence | Priority | |---|----------|----------|----------|----------| | 2.1 | Data governance framework is established | | | | | 2.2 | Data owners are assigned for key domains | | | | | 2.3 | Data stewards are identified and trained | | | | | 2.4 | Data policies are documented | | | | | 2.5 | Data classification scheme exists | | | | | 2.6 | Data quality standards are defined | | | | | 2.7 | Data access controls are implemented | | | | | 2.8 | Data lineage is tracked | | | | | 2.9 | Regulatory compliance requirements are met | | | | | 2.10 | Data governance metrics are monitored | | | | Section Score: __ / 50 --- Section 3: Data Architecture & Infrastructure | | Assessment Item | Rating (1-5) | Evidence | Priority | |---|----------|----------|----------|----------| | 3.1 | Enterprise data architecture is documented | | | | | 3.2 | Data integration patterns are standardized | | | | | 3.3 | Data warehouse/lakehouse is implemented | | | | | 3.4 | Master data management is in place | | | | | 3.5 | Data catalog exists and is maintained | | | | | 3.6 | Data pipelines are reliable and monitored | | | | | 3.7 | Cloud data strategy is defined | | | | | 3.8 | Data security measures are implemented | | | | | 3.9 | Disaster recovery plan exists for data | | | | Section Score: __ / 45 --- Section 4: Analytics & Insights | | Assessment Item | Rating (1-5) | Evidence | Priority | |---|----------|----------|----------|----------| | 4.1 | BI tools are deployed and adopted | | | | | 4.2 | Self-service analytics is enabled | | | | | 4.3 | Key metrics are consistently defined | | | | | 4.4 | Dashboards are used for decision-making | | | | | 4.5 | Advanced analytics capabilities exist | | | | | 4.6 | ML/AI initiatives are underway | | | | | 4.7 | Data products are identified | | | | | 4.8 | Analytics ROI is measured | | | | Section Score: __ / 40 --- Section 5: Data Culture & Skills | | Assessment Item | Rating (1-5) | Evidence | Priority | |---|----------|----------|----------|----------| | 5.1 | Data literacy programs exist | | | | | 5.2 | Data skills are part of hiring criteria | | | | | 5.3 | Data training is available to all employees | | | | | 5.4 | Data-driven decisions are the norm | | | | | 5.5 | Data success stories are celebrated | | | | | 5.6 | Cross-functional data collaboration occurs | | | | | 5.7 | Data community of practice exists | | | Section Score: __ / 35 --- Scoring Summary | Section | Max Score | Your Score | Percentage | |---|----|----|----| | Data Strategy & Leadership | 35 | | | | Data Governance | 50 | | | | Data Architecture & Infrastructure | 45 | | | | Analytics & Insights | 40 | | | | Data Culture & Skills | 35 | | | | Total | 205 | | | Maturity Level Interpretation | Total Score | Maturity Level | Description | |---|---|---| | 41-82 | Initial | Ad-hoc data practices,