

Data & BI Readiness Checklist

A planning checklist for dashboards, reporting, analytics, and data-platform initiatives.

1. Decision & KPI Clarity

- ☐ Clarify which business decisions the report/dashboard should support.
- ☐ Agree on KPI definitions.
- ☐ Identify metric owners.
- ☐ Define required drill-down dimensions.
- ☐ Define refresh frequency.

KPI / Metric	Business Definition	Owner	Refresh

2. Data Source Readiness

- ☐ Identify source systems.
- ☐ Confirm access method (API, DB, file, export).
- ☐ Confirm historical data depth.
- ☐ Validate unique identifiers for joins.
- ☐ Document missing/duplicate data issues.
- ☐ Identify sensitive data and access restrictions.

Known data quality issues

3. Reporting & Delivery

- ☐ Define primary audience and access model.
- ☐ Confirm preferred delivery platform.
- ☐ Document mobile/export/print requirements.
- ☐ Define alerting needs.
- ☐ Identify UAT participants.
- ☐ Assign post-launch validation ownership.

Readiness Signal

A BI project is ready to build when KPI definitions are agreed, data access is feasible, join logic is understood, validation owners are available, and the expected decisions are clear.

Open questions before build
