

DATA STRATEGY TOOLKIT

Data Strategy Diagnostic Workbook

Baseline and anchor templates: what the last plan delivered, where the business needs better decisions

THE SO WHAT OF THIS DECK

Fill in the workbook with your own objectives, use cases and data products, then check that every data product serves a scored use case before you fund it.

Previous initiatives: what we learned

Initiative	Result	Root cause	Lesson for this cycle
[Initiative]	[Met / missed / exceeded]	[Why]	[What we will do differently]
[Initiative]	[Met / missed / exceeded]	[Why]	[What we will do differently]
[Initiative]	[Met / missed / exceeded]	[Why]	[What we will do differently]
[Initiative]	[Met / missed / exceeded]	[Why]	[What we will do differently]
[Initiative]	[Met / missed / exceeded]	[Why]	[What we will do differently]

SO WHAT

Carry the lessons into the new plan explicitly; repeated mistakes are the fastest way to lose the sponsor.

Assumptions and risks: did they hold?

Assumption or risk	Status	Lesson
[Assumption or risk]	[Held / did not / unclear]	[Lesson]
[Assumption or risk]	[Held / did not / unclear]	[Lesson]
[Assumption or risk]	[Held / did not / unclear]	[Lesson]
[Assumption or risk]	[Held / did not / unclear]	[Lesson]
[Assumption or risk]	[Held / did not / unclear]	[Lesson]

Data function scorecard

MATURITY BASELINE <i>[Level by dimension, from the maturity assessment]</i>	BUSINESS PARTNER RATING <i>[Satisfaction and top three complaints]</i>	SPEND MAP <i>[Central vs business-led spend, by theme]</i>
DELIVERED <i>[What the last plan delivered]</i>	STUCK <i>[What stalled, and why]</i>	WHERE WE NEED HELP <i>[Decisions and support needed]</i>

Decision health by capability

Business capability	Key decision	Who decides	How often	Data used today	Health (1-5)
[Capability]	[Decision]	[Role]	[Daily / weekly]	[Sources]	
[Capability]	[Decision]	[Role]	[Daily / weekly]	[Sources]	
[Capability]	[Decision]	[Role]	[Daily / weekly]	[Sources]	
[Capability]	[Decision]	[Role]	[Daily / weekly]	[Sources]	
[Capability]	[Decision]	[Role]	[Daily / weekly]	[Sources]	
[Capability]	[Decision]	[Role]	[Daily / weekly]	[Sources]	

SO WHAT

Capabilities with key decisions scoring 1 or 2 are where the data strategy should start.

Trends that change our data needs

MARKET AND CUSTOMERS

[Trend] → [implication for data]

REGULATION

[Trend] → [implication]

TECHNOLOGY AND AI

[Trend] → [implication]

COMPETITORS

[Trend] → [implication]

PARTNERS AND ECOSYSTEM

[Trend] → [implication]

WORKFORCE

[Trend] → [implication]

SO WHAT

Each trend should end in an implication for data, or it does not belong in the strategy.

The eight pillar decisions

Pillar	The decision	Our choice
Value and use cases	Which outcomes will data be accountable for?	<i>[Our choice]</i>
Data domains and products	Which data matters most, and who owns it?	<i>[Our choice]</i>
Governance and trust	How will data be defined, controlled and trusted?	<i>[Our choice]</i>
Architecture and platform	What platform pattern will deliver data where it is needed?	<i>[Our choice]</i>
People and literacy	What skills does the organisation need, and how will it get them?	<i>[Our choice]</i>
Operating model	Who does what, centrally and in the business?	<i>[Our choice]</i>
Funding and investment	How will data be funded, and how will value be tracked?	<i>[Our choice]</i>
Risk, privacy and responsible AI	Which risks will the strategy manage, and how?	<i>[Our choice]</i>
SO WHAT	Leave no pillar undecided; an unmade decision gets made by default, usually badly.	

Initiative on a page

INITIATIVE <i>[Name and one-line description]</i>	OBJECTIVE SERVED <i>[Data objective and map IDs]</i>	OWNER AND TEAM <i>[Business owner, delivery lead]</i>
SCOPE <i>[In / out]</i>	MILESTONES <i>[Three to five, with dates]</i>	INVESTMENT <i>[Cost and people]</i>
SUCCESS MEASURES <i>[Measure, baseline, target, date]</i>	DEPENDENCIES <i>[Data, platform, people]</i>	RISKS <i>[Top risks and mitigations]</i>

SO WHAT

Fund nothing that cannot fill this page, especially the success measure and its baseline.

Review triggers

Trigger	What we would revisit	Who decides
Business strategy change	New goals, markets or business model: revisit anchor and prioritise.	[Name]
Merger, acquisition or divestment	New data estates and owners: revisit design and sequence.	[Name]
Regulatory change	New obligations: revisit governance, risk and priorities.	[Name]
Missed measures	A KPI off track for two quarters: root-cause and re-plan.	[Name]
Technology shift	A step change in platforms or AI: revisit architecture and value.	[Name]