

DATA STRATEGY ROADMAP REVIEW

TEMPLATE

Manage change, prove impact, and evangelize your data strategy

Data Strategy Roadmap Review Template

A data strategy roadmap is only valuable if it delivers measurable business impact and stays aligned as priorities evolve. This review template helps you sustain leadership buy-in, keep momentum, identify gaps that stall progress, and make necessary adjustments while keeping your roadmap aligned to business goals.

Who this is for

This template is for data leaders and teams responsible for executing a data strategy roadmap and communicating progress to business stakeholders and executive leadership.

When to use it

We recommend quarterly reviews, plus any time your organization faces a key inflection point. Your roadmap review should be a planned documented initiative built into the roadmap itself.

5 Areas to Review

01. ALIGNMENT TO BUSINESS GOALS

02. ADOPTION & USAGE

03. RE-PRIORITIZATION & SEQUENCING

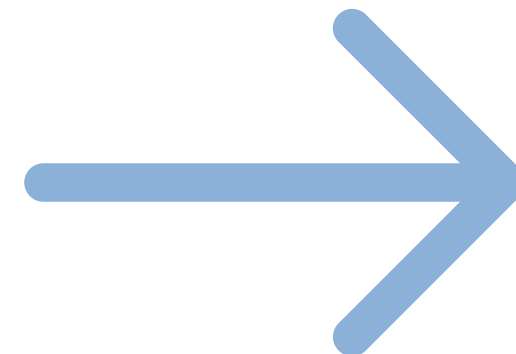
04. READINESS & GAPS

05. NEXT QUARTER FOCUS

Example Review Template

Pages 4-9 demonstrate how each section works using a client example.

Jump to page 10 for a blank template to use for your own roadmap review.



01

Alignment to Business Goals

Tie each initiative back to company objectives — including ROI — to show leaders how data work is delivering measurable business impact. Go beyond “we shipped it”. Report ROI to date in dollars saved, revenue gained, and tangible efficiency improvements. Show leadership how value is materializing, not just where work was completed.

Example ————— The following examples are based on a national CPG company with multiple product lines sold through both retail partners and direct-to-consumer channels.

Company Objective: **Grow direct-to-consumer revenue by 25%**

Initiatives	Expected Outcome	Expected ROI	Progress to ROI	Notes on Progress
Customer replenishment prediction model Model training via Databricks MLflow + Sigma reports + automated email triggers through marketing automation platform for high-propensity repeat buyers	Increase repeat purchase rate through timely replenishment reminders for consumable products	Increase DTC revenue by 8% (\$1.2M) through improved retention and purchase frequency	Pilot generated \$180K in incremental revenue to-date	Early pilot with 5,000 customers showed 15% conversion on replenishment emails vs 3% on general promotions. Scaling to full customer base in Q3

01 Alignment to Business Goals

CPG company example cont. _____

PRO TIP: Share this one with your Execs

This executive view provides just enough info to share priorities, makes wins visible, and highlights where resources are needed.

Company Objective: **Reduce operating costs by 10%**

Initiatives	Expected Outcome	Expected ROI	Progress to ROI	Notes on Progress
Automate inventory reconciliation Phase 1: Implement dbt to automate warehouse-to-system inventory matching, turning daily manual spreadsheet reconciliation into automated data quality checks.	Reduce manual inventory tracking to free supply chain team for exception management	Save ~60 hours/month in manual reconciliation time	Saved ~35 hours/month so far	Automated 80% of routine SKU matching; complex promotional SKUs still require manual review. Expect to exceed ROI in Phase 2 with automated exception flagging
Establish product-level profitability reporting Phase 1: Sigma MVP Dashboard set to give finance and category managers visibility into product line profitability including COGS, trade spend, and retail fees before scaling full P&L suite	Help category managers identify underperforming SKUs and optimize product mix	\$250K forecasted through better margin management and SKU rationalization	MVP deployed; early insights flagged 12 SKUs for discontinuation	Dashboard highlights top 20 profitable vs bottom 20 underperforming SKUs by channel. Category team using insights in quarterly line reviews

02

Adoption & Usage

Measure whether teams are actively using what was delivered; adoption proves relevance. Pairing usage stats with business impact helps reinforce the mission.

Deliverable	Target users	Active users	Engagement Notes
Examples ↓			
Retail partner performance dashboard	Sales team (28) Account managers (7)	28 active monthly users	Strong adoption by national account managers; regional reps need additional training on velocity metrics and how to use sell-through data in retail conversations
Executive KPI scorecard	Entire executive leadership team (currently 10 members)	10 active weekly users	100% adoption; execs requested additional automation of monthly board reporting and year-over-year comparisons

PRO TIP: Modern BI and data platforms have usage reports already built in — use them!

03

Re-prioritization
& Sequencing

Use quarterly checkpoints to revisit feasibility and value scoring. When new a initiative is introduced, document where it goes in the roadmap and the impact it has on other planned initiatives. A transparent changelog builds trust — especially when departments share data resources.

New/Adjusted Initiative	Reason for change	Expected ROI	Impact on other work
Examples ↓			
New: AI-powered forecasting	Executive mandate for AI pilot to improve inventory planning before holiday season	Reduce overstock by 15% (\$800K value)	Data science team shifting capacity from marketing analytics to supply chain forecasting will delay promotional effectiveness model by 1 quarter;
Retailer POS data integration remediation	Critical data quality issues discovered in major retailer feed; impacting revenue reporting accuracy	N/A — foundational fix	Pushed back customer segmentation project by 2 weeks; engineering team prioritized fixing data pipeline integrity before building new analytics

04

Readiness & Gaps

Identify missing roles, skills, technology, or processes that are at risk of stalling delivery.

Gap Identified	Proposed Solution	Notes
Examples ↓		
Critical governance tasks (data definitions, master data management, access controls) are missing owner	Hire Data Governance Lead	Recruiting in progress; Data Engineering lead providing interim coverage but risk of bottlenecks if role not filled by Q3
Each new data sources from retailers taking weeks; leading to inconsistent fields, schema mismatches, and messy downstream reporting	ELT orchestration tool to deploy ingestion jobs automatically.	Solutions Architect researching dbt and Airflow to propose business case ASAP

05

Next Quarter Focus

After any adjustments have been made to the roadmap, review the immediate initiatives for the quarter with your stakeholders. This maintains alignment and momentum lets department leads ensure they have resources in place.

Priority initiative	Teams/Resources
Examples ↓	
Inventory reconciliation automation (Phase 2)	- Supply chain operations SMEs
Marketing attribution model for DTC	- Marketing POC - Additional data engineering support (for stitching cross-channel customer journey) - Potentially more engineering support if Governance hire delayed
Retail partner scorecard expansion for Sales team	- Sales POC - RevOps Director - Salesforce Admin - Marketing POC

Your Roadmap Review Template

HOW TO USE

Fill out each section based only on initiatives in scope for the period you are assessing — not your entire roadmap.

01. Alignment to Business Goals

02. Adoption & Usage

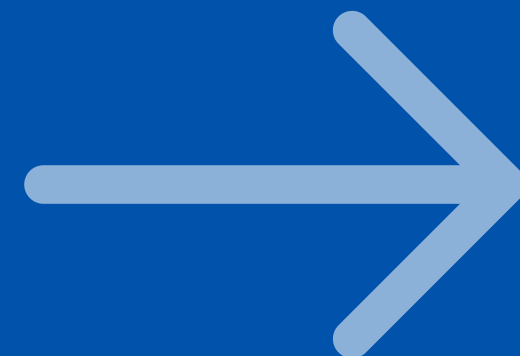
03. Re-prioritization & Sequencing

04. Readiness & Gaps

05. Next Quarter Focus

TIPS FOR ONGOING ADOPTION & BUY-IN

- Keep ROI cumulative to track total business value delivered over time.
- Update quarterly to document what was delivered, the impact it had, what changed, and where to focus next.
- Share the completed review with roadmap stakeholders to maintain transparency and alignment.



01

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