

Data Health Checklist

Score your organization across 8 dimensions. Check each item that's true for your team, then tally your score at the bottom.

1. Data Accuracy

- We have a single source of truth for key metrics (revenue, pipeline, etc.)
- Numbers in our CRM match numbers in our finance system
- We regularly validate data against original sources
- We have documented definitions for all key metrics

2. Data Completeness

- Required fields in our CRM are actually enforced (not optional)
- Less than 5% of records have missing critical fields
- Historical data is preserved — we don't lose records when systems change
- We track data completeness metrics and review them regularly

3. Data Freshness

- Our dashboards/reports refresh at least daily
- Leadership sees data that's less than 24 hours old
- We don't rely on manual exports that might be stale
- Data pipelines have monitoring and alerting for failures

4. Data Accessibility

- People who need data can get it without asking someone else to pull it
- We have self-service dashboards for common questions
- Data definitions and documentation are available to the whole team
- New team members can find and understand our reporting within a week

5. Reporting Efficiency

- Our recurring reports take less than 30 minutes to produce
- We don't manually copy-paste data between systems for reports
- Report formats are standardized across teams/departments
- We've eliminated reports that nobody actually reads

6. Automation Maturity

- Our CRM and project tools sync automatically (no manual updates)
- Client onboarding triggers automated workflows across systems
- We use scheduled automations for recurring data tasks
- We have error handling and notifications for failed automations

7. Data Governance

- We have a clear owner for each major data system
- There are documented rules for data entry (naming conventions, formats)
- We audit data quality at least quarterly
- Access controls exist — not everyone can edit everything

8. Decision Confidence

- Leadership trusts the numbers in our dashboards
- We make data-driven decisions, not gut-driven ones
- We can answer basic business questions (revenue, pipeline, costs) in under 5 minutes
- Different departments agree on shared metrics

Scoring Guide

Count how many items you checked:

Score	Rating	What It Means
28–32	Excellent	Your data infrastructure is mature. Focus on optimization.
20–27	Good	Solid foundation with clear improvement opportunities.
12–19	Needs Work	Significant gaps. Prioritize accuracy and automation.

0-11	Critical	Manual processes and trust issues are costing real money.
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Your score: _____ / 32

Want help improving your score? Book a free 20-minute data diagnostic.
altographanalytics.com/contact