

Digital marketing use case framework

A comprehensive framework for developing and implementing marketing use cases, from initial ideation to production optimization.

Process Overview

Detailed Planning

Ideation
Phase 1: Discovery
Deliverables ◀

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Assessment

Phase 2: Business Case Assessment
▶ Deliverables

2

Requirements

Phase 3: Requirements Gathering
Deliverables ◀

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Design

Phase 4: Technical Design & Planning
▶ Deliverables

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Development

Phase 5: Development
Deliverables ◀

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Validation

Phase 6: Validation
▶ Deliverables

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Feedback

Phase 7: Process Feedback
Deliverables ◀

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Phase 8: Deployment & Monitoring
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Optimization

Phase 9: Optimization & Iteration
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Ideation

Phase I: Discovery

1 Phase Description

This starting phase focuses on clearly defining the business opportunity, to make sure that all stakeholders are aligned on the objectives and scope. It also includes identifying the data requirements and additional ML models needed to address the business problem.

Key Activities

- Define the business opportunity
- Align on objectives and scope
- Identify data needs and availability
- Evaluate existing models and identify gaps

General Information

Use case name

e.g., Customer Churn Prediction

Brief explanation of use case

Briefly describe what this use case aims to achieve...

Business Context

What business problem are we solving and for which customer segments?

Describe the specific business problem and target segments...

How will we measure success?

Define success metrics and KPIs...

Data Requirements

What data do we need and is it available?

List required data sources and their availability...

Can we use existing machine learning models as is or do we need to customize them?

Assess existing model capabilities and requirements...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<div>Select rol</div>	<div>Select co</div>	<div>Select tea</div>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<div></div>
<input type="text" value="Enter name"/>	<div>Select rol</div>	<div>Select co</div>	<div>Select tea</div>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<div></div>

+ Add Stakeholder

Ideation Scoring

Strategic Alignment

How well it aligns with company strategy

1

2

3

4

5

PoorLimitedGoodStrongPerfect

Customer Value

Direct benefit to customers

1

2

3

4

5

LowMinorModerateHighExceptional

Data Availability

Quality and accessibility of required data

1

2

3

4

5

PoorLimitedAverageGoodExcellent

Phase Completion Checklist

- ☐ Has the business opportunity been clearly defined?
- ☐ Are the stakeholders identified and aligned?
- ☐ Are the success criteria and KPIs defined?

Phase I of 9

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Assessment

Phase 2: Business Case Assessment

1 Phase Description

This phase validates the business opportunity and ensures there's a strong case for moving forward. The focus is on understanding ROI, resource requirements, and technical feasibility.

Key Activities

- Calculate expected ROI and business value
- Assess technical feasibility and resource requirements
- Identify marketing and operational resources needed
- Evaluate risks and mitigation strategies

Business Case

What is the expected return on investment (ROI) and business value?

Provide specific revenue impact projections, cost savings or efficiency gains...

Resources

What technical expertise and resources are required?

Evaluate technical team capabilities, required infrastructure and integration complexity...

What marketing or operational resources are required?

Evaluate marketing team capacity, operational support and any additional resources needed...

Risk Management

What are the key risks and mitigation strategies?

Identify potential risks related to data quality, technical feasibility, and operational impact...

Timeline

What is the estimated timeline and key milestones?

Outline the expected timeline for implementation, including key milestones and deliverables...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<div>Select role</div>	<div>Select co</div>	<div>Select team</div>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<div></div>
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+ Add Stakeholder

Business Case Scoring

Revenue Potential

Expected annual revenue impact

3

1

2

3

4

5

Minimal

Low

Moderate

High

Very High

Resource Requirements

Resource requirements to implement this use case

3

1

2

3

4

5

Very Low

Low

Moderate

High

Very High

Risk Level

Level of technical, business and operational risks

3

1

2

3

4

5

Very Low

Low

Moderate

High

Very High

Phase Completion Checklist

- ☐ Has the quantified business value and ROI been projected?
- ☐ Is the feasibility of the business case assessed?
- ☐ Are the required resources identified and available?
- ☐ Are the risks and mitigation strategies defined?
- ☐ Are the timelines and milestones established?

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Requirements

Phase 3: Requirements Gathering

1 Phase Description

This phase focuses on gathering detailed functional and non-functional requirements. The team captures specific system behavior, performance expectations, and constraints to ensure the solution meets all stakeholder needs.

2 Key Activities

- Gather functional requirements and user stories
- Define non-functional requirements on system performance, scalability, and security
- Document system constraints and dependencies
- Validate requirements with stakeholders

Functional

What are the functional requirements?

Define what the system must do - specific features, user stories, and business logic...

Non-Functional

What are the non-functional requirements?

Define performance, scalability, security, usability, and reliability requirements...

Constraints

What are the system constraints & dependencies?

Identify technical constraints, regulatory requirements, and system dependencies...

Validation

What are the acceptance criteria?

Define measurable criteria for validating that requirements are met...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select rol"/>	<input type="text" value="Select co"/>	<input type="text" value="Select tea"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>
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+ Add Stakeholder

Requirements Gathering Scoring

Requirements Clarity

How well-defined and clear the requirements are

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input checked="" type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Vague	Unclear	Moderate	Clear	Crystal Clear

Stakeholder Alignment

Level of agreement among stakeholders on requirements

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input checked="" type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Poor	Limited	Good	Strong	Perfect

Requirements Complexity

Complexity of the requirements

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input checked="" type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Low	Low	Moderate	High	Very High

Requirements Change Risk

Risk of requirements changing during development

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input checked="" type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Low	Low	Moderate	High	Very High

Phase Completion Checklist

- ☐ Are all functional requirements clearly documented?
- ☐ Are non-functional requirements defined with measurable criteria?
- ☐ Have system constraints and dependencies been identified?
- ☐ Are requirements validated and approved by stakeholders?

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Design

Phase 4: Technical Design & Planning

1 Phase Description

This phase focuses on creating the technical blueprint for the solution. The team designs the architecture, data models, and integration plans needed to build a scalable and maintainable system.

2 Key Activities

- Design technical architecture
- Define data models and schemas
- Plan system integration and scalability requirements

Architecture Design

What is the technical architecture design?

Describe the overall technical architecture and system components, including data flow, infrastructure, and technology stack...

Data Design

What are the data models and schemas?

Define input and output of data...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="-"/>
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="-"/>

+ Add Stakeholder

Technical Scoring

Technical Complexity

Complexity of the technical implementation

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Low	Low	Moderate	High	Very High

Scalability Potential

Ability to expand and grow impact

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Limited	Small	Moderate	High	Unlimited

Reusability

Potential to reuse components for other use cases

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Single-use	Limited	Some	High	Universal

Phase Completion Checklist

- ☐ Is the technical architecture fully designed?
- ☐ Are data models and schemas defined?
- ☐ Is the system integration plan complete?
- ☐ Are scalability and performance requirements addressed?
- ☐ Is the design reviewed and approved by stakeholders?

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Development

Phase 5: Development

1 Phase Description

This phase focuses on building the solution according to the technical design and requirements. The development team implements the system components, features, and functionality as specified in earlier phases.

2 Key Activities

- Develop solution components according to technical specifications
- Implement functional requirements and business logic
- Build data pipelines and system integrations
- Create user interfaces and API endpoints

Development Progress

What is the current development progress?

Describe development progress, completed features, and implementation status against requirements...

Feature Implementation

What features have been implemented?

List completed features, functionality, and system components that have been built...

Technical Challenges

What technical challenges have been encountered?

Document technical challenges, blockers, and how they were resolved or are being addressed...

Code Quality

How is code quality being maintained?

Describe code review processes, coding standards compliance, and quality assurance measures...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>
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+ Add Stakeholder

Development Scoring

Implementation Progress

Current state of development completion

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Behind	Delayed	On Track	Ahead	Complete

Test Coverage

Extent of unit and integration tests covering the codebase

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Low	Low	Moderate	High	Very High

Code Quality

Maintainability and quality of developed code

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Poor	Below Standards	Acceptable	Good	Excellent

Phase Completion Checklist

- ☐ Are all functional and non-functional requirements implemented?
- ☐ Is the code following established coding standards (testing, documentation, etc.)?
- ☐ Is basic functionality working as expected when tested?

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Validation

Phase 6: Validation

1 Phase Description

This phase validates the solution with real users and data on a controlled testing environment to ensure it meets business requirements.

2 Key Activities

- Validate solution with real users and scenarios
- Run controlled experiments to validate behavior
- Gather user feedback and performance metrics

User Validation

What are the results of user testing?

Document user testing sessions, feedback, and iterations...

Performance Testing

What are the results of performance validation?

Validate system performance under real-world conditions, think of process time and accuracy...

Approval Process

What feedback have stakeholders provided?

Document stakeholder feedback and approval decisions...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>

+ Add Stakeholder

Validation Scoring

User Satisfaction

Satisfaction level of users with the solution

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Low	Low	Moderate	High	Very High

Performance Reliability

Reliability of the solution under expected load

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Poor	Poor	Average	Good	Excellent

Feedback Processing Effort

Effort required to process and implement feedback

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Low	Low	Moderate	High	Very High

Phase Completion Checklist

- ☐ Has the solution been tested with real users?
- ☐ Are the results of user testing documented?

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Feedback

Phase 7: Process Feedback

1 Phase Description

This phase focuses on processing feedback from the validation phase and validating that the solution meets all requirements and expectations before deployment on production.

2 Key Activities

- Process feedback from validation phase
- Validate improved solution meets all requirements
- Obtain final approval from key stakeholders
- Update documentation with implementation details

Feedback

What feedback has been addressed?

Document feedback addressed based on user feedback...

Requirements Validation

Have all requirements been validated?

Validate that the solution still meets all functional and non-functional requirements...

Approval

Do you have final approval from stakeholders?

Document the final approval from key stakeholders, mention names and any additional comments...

Lessons Learned

What lessons have been learned during the development of this solution?

Document lessons learned and recommendations for future implementations...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>

+ Add Stakeholder

Process Feedback & Validation Scoring

Requirements Compliance

How well the solution meets all functional and non-functional requirements

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Poor	Partial	Good	Strong	Complete

Deployment Readiness

How ready the solution is for production deployment

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Not Ready	Some Issues	Nearly Ready	Ready	Fully Ready

Deployment Risk

Risk associated with deploying the solution to production

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Low	Low	Moderate	High	Very High

Phase Completion Checklist

- ☐ Has all feedback been processed and addressed?
- ☐ Does the updated solution still meet all functional and non-functional requirements?
- ☐ Is the solution ready for deployment?

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Deployment

Phase 8: Deployment & Monitoring

1 Phase Description

This phase focuses on deploying the solution to production and monitoring its performance to ensure all works as expected.

2 Key Activities

- Deploy solution to production environment
- Set up monitoring dashboards and alerts
- Inform end users about the go-live
- Monitor and resolve production issues

Deployment Strategy

What is the deployment strategy?

Document deployment strategy, timeline, and rollback procedures..

User Enablement

What training is being provided to users?

Document training materials if needed and elaborate on user adoption..

Communication Plan

How will you communicate changes to stakeholders?

Document communication plan for stakeholders, including go-live announcements and support agreements..

Monitoring

How will you monitor the solution?

Establish monitoring processes, alerting mechanisms, rollback procedures..

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement.."/>	<input type="button" value="Add"/>
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement.."/>	<input type="button" value="Add"/>

+ Add Stakeholder

Deployment & Monitoring Scoring

Deployment Complexity

Complexity of the deployment process

3

1

Very Simple

2

Simple

3

Moderate

4

Complex

5

Very Complex

Monitoring Readiness

Quality and completeness of monitoring setup

3

1

Poor

2

Limited

3

Adequate

4

Good

5

Excellent

User Readiness

How prepared users are for the new solution

3

1

Not Ready

2

Limited

3

Somewhat Ready

4

Ready

5

Fully Prepared

Deployment Risk

Risk level of the deployment process

3

1

Very Low

2

Low

3

Moderate

4

High

5

Very High

Phase Completion Checklist

- ☐ Is the solution successfully deployed to production?
- ☐ Are monitoring dashboards and alerts configured?
- ☐ Are users ready to use the solution?

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Optimization

Phase 9: Optimization & Iteration

1 Phase Description

This phase focuses on continuous improvement of the solution based on production data and user feedback.

4 Key Activities

- Optimize system performance and efficiency
- Add new features based on user feedback
- Refine model parameters based on production data
- Improve operational processes and workflows

System Optimization

What optimizations can be made?

Document performance improvements, efficiency gains, and optimizations...

Product Development

What feature enhancements are planned?

Plan and document new features based on user feedback and needs...

Model Enhancement

What model improvements are needed?

Document model improvements, retraining, and performance gains...

Process Improvement

What operational process improvements can be made?

Ways to optimize operational processes, workflows, and team efficiency...

Stakeholders 1

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select rol"/>	<input type="text" value="Select co"/>	<input type="text" value="Select tea"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="-"/>
<input type="text" value="Enter name"/>	<input type="text" value="Select rol"/>	<input type="text" value="Select co"/>	<input type="text" value="Select tea"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="-"/>

+ Add Stakeholder

Optimization & Iteration Scoring Assessment Scoring

Feature Value

Value delivered by new features based on user feedback

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
No Value	Low Value	Medium Value	High Value	Very High Value

Model Performance

Improvement in model performance based on production data

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Poor	Poor	Average	Good	Excellent

Process Efficiency

Efficiency of operational processes and workflows

3

<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>
Very Inefficient	Inefficient	Average	Efficient	Very Efficient

Phase Completion Checklist

- ☐ Are optimization opportunities identified and prioritized?
- ☐ Are new features delivering expected value?
- ☐ Is model performance improving over time?
- ☐ Are operational processes efficient?
- ☐ Is continuous improvement cycle established?

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2 Key Activities

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- Align on objectives and scope
- Identify data needs and availability
- Evaluate existing models and identify gaps

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Describe the specific business problem and target segments...

How will we measure success?

Define success metrics and KPIs...

Data Requirements

What data do we need and is it available?

List required data sources and their availability...

Can we use existing machine learning models as is or do we need to customize them?

Assess existing model capabilities and requirements...

Stakeholders

Name	Role	Company	Team	Email	Involvement & Responsibilities	Action
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>
<input type="text" value="Enter name"/>	<input type="text" value="Select role"/>	<input type="text" value="Select company"/>	<input type="text" value="Select team"/>	<input type="text" value="Enter email"/>	<input type="text" value="Describe involvement..."/>	<input type="button" value="Add"/>

+ Add Stakeholder

Ideation Scoring

Strategic Alignment

How well it aligns with company strategy

1 2 3 4 5
Poor Limited Good Strong Perfect

Customer Value

Direct benefit to customers

1 2 3 4 5
Low Minor Moderate High Exceptional

Data Availability

Quality and accessibility of required data

1 2 3 4 5
Poor Limited Average Good Excellent

Phase Completion Checklist

- ☐ Has the business opportunity been clearly defined?
- ☐ Are the stakeholders identified and aligned?
- ☐ Are the success criteria and KPIs defined?

Phase I of 9

Export to Confluence

Exporting: Phase I: Phase I: Discovery

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Phase I: Discovery

Details

No specific details have been entered for this phase yet.

Ideation Scoring

Scoring Dimension	Score	Rating	Description
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