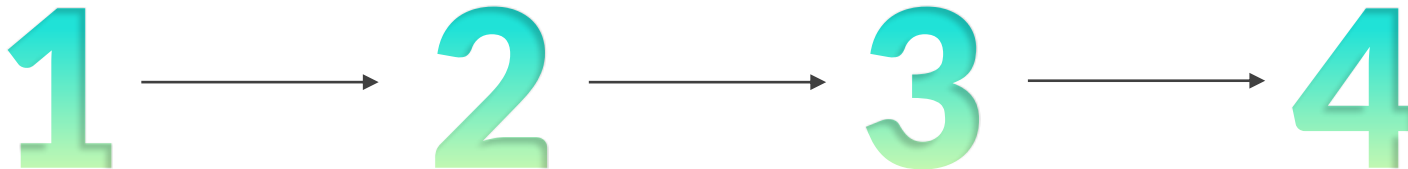# MEASUREMENT PLANNING

IF YOU CAN'T MEASURE IT,
YOU CAN'T OPTIMIZE IT

Measurement planning is about defining *exactly* what a successful outcome looks like for the business, and building a framework to identify, track and optimize key metrics

1 ⟶ **2** ⟶ **3** ⟶ **4**

| *Think business first* | *Know your audience* | *Define the KPIs* | *Identify data sources* |

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MEASUREMENT ROADMAP

1 **2** **3** **4**

Think business first | Know your audience | Define the KPIs | Identify data sources

One of the most common pitfalls for Analysts is jumping into the data too quickly; before you start thinking like an analyst, think like a **business owner** first!

Key questions to ask:

- *What are the **key business goals** and objectives?*
- *Where does this analysis **fit into the overall business**?*
- *What are the **most important questions** that stakeholders need answers to?*
- *What **types of actions** do you want them to take after seeing your analysis?*

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MEASUREMENT ROADMAP

1 **2** **3** **4**

Think business first | **Know your audience** | Define the KPIs | Identify data sources

After thinking about the business impact, focus on the **key stakeholders** next; who are they, what do they need, and how will your analysis support them?

Key questions to ask:

- Who is the **primary audience** you are designing the measurement plan for?
- What are their **goals and incentives**? What do they care most about?
- Are there **multiple stakeholders** who will be impacted by your analysis?
- What **type of information** would inspire them to take action?

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MEASUREMENT ROADMAP

1   Think business first

2   Know your audience

3   Define the KPIs

4   Identify data sources

Once you understand the business impact and stakeholder needs, you're ready to start identifying **Key Performance Indicators** (KPIs) and supporting metrics

Key questions to ask:

- Which **business goals** have you already identified?

- For each goal, which metrics can be used to **accurately measure it**?

- Which of those are **most important** for your stakeholders?

- Thinking one level deeper, what other **supporting metrics** might help you optimize or make decisions to improve your KPIs?

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MEASUREMENT ROADMAP

1
Think business first

2
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3
Define the KPIs

4
Identify data sources

After identifying your KPIs and supporting metrics, it's time to think about **what data you need**, **where to source it**, and **how to prepare it for analysis**

Key questions to ask:

- Which **sources** provide the data you need to track each metric?

- Who **owns or manages** each data source?

- How **frequently** is each data source refreshed?

- Can you **automate or streamline** the data collection process?

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KEY TAKEAWAYS

✓ Before you think like an analyst, think like a **business owner**
- *Focus on the specific business outcomes you want to impact, and the role your analysis will play*

✓ Understand **who the stakeholders are**, and what motivates them
- *Think about how your analysis will impact key decision makers, and what will inspire them to act*

✓ Define **clear, measurable KPIs** tied directly to key outcomes
- *Take time to identify the most important metrics to help you track and optimize performance*

✓ Document your **data requirements** to stay organized
- *Create a shared document to outline your KPIs, supporting metrics, data sources, and requirements*