

Analytics Project Plan

Project Name

Date:

Project Lead:

Objective

This worksheet contains five categories of requirements and conditions that a client-side stakeholder in a project involving analytic services needs to define to ensure timely delivery, optimized cost and valuable outcomes.

Whether you are working with an in-house team or an external partner, clarifying these items will enable you to communicate with the analytics team clearly that ensures timely delivery, optimized cost and desired outcomes.

You may not know the answers to each question but filling out this worksheet as completely as possible will highlight areas where more planning is needed. You will then be able to clarify these things in your initial discussions with your analytics partner.

Business Need

Define the target domains to help bridge the knowledge language gap between Subject Matter Experts (SMEs) and the analytics team. The more specialized the relevant domains, the more likely it is that it will affect the composition of the analytics team or, in general, require additional effort to prepare them for the project.

Describe the use case the solution will address:

Describe the relevant scientific and/or technical area (if applicable):

Define what you, as the business-side stakeholders, expect from the project. This will help translate your business needs to the analytics tasks. To ensure the broadest possible benefits from the project, it is highly recommended to gather and share perspectives from client-side stakeholders from every level that the solution will affect.

Specify the business goal by explaining what results the business expects to see from the project:

Explain how these results will affect end-users' workflows:

Explain how results will affect decision-makers' workflows:

Explain how the project results will be evaluated:

If there is an existing practice or solution for serving the business need at hand, explain how it works and why it needs to be replaced or improved.

Describe the current solution to the business problem (if available):

Data

Contents of Data

Specify the length of the historical data available (in months):

Specify the quantity of data (size or number of records, e.g. X tables totaling Y TB of data):

Select the data format:

- ☐ Excel
- ☐ Structured file (CSV, JSON, XML)
- ☐ Data Warehouse
- ☐ Other

Data Type. The data needs can range based on the specifications of each project. Determining the data type is important to ensure the business needs that were specified above are met to the fullest expectation. These different data types could be a live version of the data that is optimal for operational style analytics, which updates data as it is worked on by the business to show real time changes in the operations as they occur. Time series data, which looks at data on a daily/weekly/monthly basis and summarize the data based on criteria we set throughout the planning process. Historical data, which is the history of your most granular data, what changes happen to the records, when do they occur and how is that record effected over time.

Specify data type(s) needed:

- ☐ Live
- ☐ Time-Series
- ☐ Historical

Assess data quality. Even if you don't have an expert on-staff who is qualified to provide a definitive assessment, a rough estimate can help the data science team evaluate the data preparation requirements.

Specify data quality:

- ☐ Perfect (no wrong/missing data)
- ☐ Reliable (very little amount of wrong/missing data)
- ☐ Sufficient (some wrong/missing data)
- ☐ Insufficient (large amount of wrong/missing data)

Personnel qualified to make actionable data quality estimates may vary based on organizational structure and industry, but common roles include data quality manager, data steward, data custodian, data governance officer and other roles that involve data maintenance.

Environment and Tools

Specify how the analytics team will access the data:

- ☐ The data will be provided on physical media or shared digitally.

☐ *Remote desktop – operating system*

☐ *Linux*

☐ *Windows*

☐ *macOS*

☐ *Cloud Service (specify):*

Specify your preferred analytics tool.

This could be dependent on how you want to see your output presented. Interactive Visualization tools could be Tableau or Excel. Programming languages that output reports could be R or Python. If you have a different programming language that is needed or want to be used for the project, please be specific.

Analytic Tools:

☐ *Tableau*

☐ *Excel*

☐ *Python*

☐ *R*

☐ *Other (please specify):*

Output

Define how you need the scoring to be executed. The frequency of output required from the project will influence the amount and nature of resources required from the client side and your analytics partner. For example, some models might necessitate the involvement of a subject matter expert to conduct 'sanity checks' to identify potential mistaken results. Meanwhile, in case of batch and real-time updates, it might make sense to retrain the model to improve accuracy or running time, which will require the reinvolvement of data science expertise.

Specify the scoring requirements

☐ **Batch Updates:**

☐ **Daily**

☐ **Weekly**

☐ **Monthly**

☐ **Other (specify):**

☐ **Real-time scoring**

☐ **One-off output**

Deadlines

Although this set of items requires cooperation with your analytic partner to finalize, sharing an idealized client-side vision of the delivery schedule of business-critical items will still provide useful cornerstones for project planning.

Set a target for the start date of the project:

Set a target for the latest date of delivery:

Define the necessary development milestones required by the business:

Next Steps

Share completed worksheet with analytic partner and set up a meeting to discuss contents of the worksheet and plan the next steps together.