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..... DATA MATURITY MODEL:

CHECKLIST FOR AGENCIES

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Introduction and how to use this checklist

This document is a companion piece to the recently published "[Data Maturity Model for Advertising](#)" whitepaper. Where the whitepaper establishes a maturity model, the checklists aim to be more prescriptive by outlining some real-life data scenarios that are indicative of a company's overall data maturity. Depending on what type of business use case(s) you're seeing day-to-day and which side of the ecosystem your company sits on, the checklists aim to provide a high-level framework and a set of sample questions to use for maturity self-evaluation. Currently there are four versions: for publishers, agencies, brands, and data technology vendors.

This checklist presents the framework from the perspective of agencies. It will apply to the buy-side of the ecosystem: namely those companies that are purchasing advertising inventory on behalf of their clients across a variety of formats and channels.

The questions below are grouped according to the four main areas of the data lifecycle, as outlined in the Data Maturity Model whitepaper. These are: data collection, data processing, data activation, and organizational readiness. Each true statement carries one point; if only part of the statement applies to you then you may award it a fractional score (e.g. ½ point). Add up the points at the end for a quick assessment of overall data maturity:

Score	<12	12-20	>20
Maturity	Low	Medium	Advanced

To tailor this framework further you may wish to add additional questions that are specific to your organization, omit/rephrase existing ones if you find that they do not apply to your circumstances, or assign more weight (e.g. a higher point value) to specific questions/sections. For example: if a significant portion of your client's strategy involves personalizing their own properties and surfacing next-best offers you may want to extend this checklist (and resulting maturity results calculations) by adding sections and considerations that specifically address this use case.

Checklist for agencies

DATA COLLECTION

- 1. We collect 1st party data from all of our client's owned & operated sites
- 2. We collect 2nd party data from our client's relevant partners
- 3. We utilize data from one or more 3rd party data providers on behalf of our client to extend reach and create audience segments
- 4. We utilize offline data (e.g. CRM or existing customers) in addition to online data sets to profile our client's users across digital channels
- 5. We are able to collect our client's transactional information (e.g. online or offline purchases) or to receive it via a partner/vendor
- 6. We know how 'fresh' each data point in our system is regardless of origin and are able to take action
- 7. We collect data on behalf of our client from all relevant digital & offline channels
- 8. We seldom experience data collection/ingestion issues (e.g. data for a given channel or a specific time period is seldom missing/corrupted)

DATA PROCESSING

- 9. We're able to uniquely identify a user across our client's properties regardless of the device(s) used for access
- 10. If multiple source systems provide the same data point, we know which system is to be treated as the system of record
- 11. We can describe detailed customer journeys and understand what stage of purchase process each customer is in
- 12. We can set different criteria for user segments (from binary yes/no if someone qualifies for a segment to degrees of qualification, e.g. 60% and higher propensity to be a frequent shopper)
- 13. We can create, take action on, and provide reporting for custom segments in a timely manner
- 14. We can calculate metrics like customer life-time value, expected life-time value per segment, cost of acquisition per segment, etc.

- 15. We know which users have been exposed to which campaigns and which ads across digital channels
- 16. We are able to calculate which changes to our marketing/media mix plan result in the biggest yield based on algorithmic modeling
- 17. We are able to make near real-time adjustments to our buying strategy based on comprehensive user-level information (including creative-level interactions)

DATA ACTIVATION

- 18. We are able to pass relevant data to multiple functional teams within our client's organization and create segment-level reports regularly
- 19. We strictly adhere to our client's privacy and data rights usage policies when we place media buys
- 20. We've created and continue to evolve a strong partner ecosystem that enables us to take effective action on our data assets as well as provide a prompt insights/reporting feedback loop from each partner
- 21. We are able to take timely, relevant action across digital channels to affect customer and prospect behavior positively

ORGANIZATIONAL READINESS

- 22. Our organization has a dedicated data owner at the executive level (e.g. Chief Data Officer) or this function is explicitly the purview of CMO, CIO, other CxO
- 23. Our organization continually invests in training, certification, and similar professional development programs when it comes to data
- 24. Data professionals have clearly defined career tracks
- 25. We take an active role in definition of industry standards and encourage participation in industry bodies like the IAB