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CHECKLIST FOR PUBLISHERS

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 publishers. It will apply to anyone on the sell-side of the ecosystem: namely those companies that are selling their advertising inventory, audience, or data assets.

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. 1/2 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 international properties are significant for your business you may want to extend this checklist (and resulting maturity result calculations) by adding region-specific sections and considerations.

Checklist for publishers

DATA COLLECTION

- 1. We collect 1st party data from all of our owned & operated sites
- 2. We collect 2nd party data from relevant partners or participate in a data coop
- 3. We utilize data from one or more 3rd party data providers to extend reach and create audience segments
- 4. We utilize offline data (e.g. CRM or existing subscribers) in addition to online data sets to profile our users across digital channels
- 5. We are able to collect information on recency and frequency of user visits and interactions with our properties regardless of the device(s) they're using to access
- 6. We know how 'fresh' each data point in our system is regardless of origin and are able to take action
- 7. We can reliably remove/expire specific data points from our own as well as downstream systems (e.g. DSPs)
- 8. We collect data from all relevant digital & offline channels
- 9. 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

- 10. We're able to uniquely identify a user across our own properties regardless of the device(s) used to access
- 11. If multiple source systems provide the same data point, we know which system is to be treated as the system of record
- 12. We can describe detailed user journeys to our advertisers and advise on best cross-channel campaign options (given their specific goals)
- 13. 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 tech early adopter)
- 14. We can create, take action on, and provide reporting for custom segments in a timely manner

- 15. Our segments consist of observed, declared, inferred, and modeled/derived user signals

DATA ACTIVATION

- 16. Multiple functional teams (namely: direct sales, programmatic, research, analytics, and revenue/finance) are able to access and report on segment-level information regularly
- 17. We have a privacy policy and a team who evaluates and sets privacy and data usage rights rules/restrictions
- 18. We are able to enforce opt outs and strict data usage rights across our owned and operated as well as our downstream partner network
- 19. We are able to execute channel-specific data usage rights (e.g. select data points may not be authorized for activation on mobile vs. on desktop)
- 20. We've created 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 continue to invest in ecosystem development and are constantly evaluating and adding new partners

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