

FREE CHECKLIST • 20 CHECKS • 6 AREAS

# Data Warehouse Readiness Checklist

Find out whether your organization is truly ready to build or migrate to a modern data warehouse — before you spend a dollar on infrastructure.

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## How To Use This Checklist

1. Score each of the 20 checks: **0** = not in place · **1** = partial or undocumented · **2** = in place, documented, and owned. Total out of 40.
2. Score each of the six areas separately as well.
3. **Read your lowest area, not your total.** Warehouse projects fail at their weakest area — a perfect score everywhere except Ownership still produces a warehouse nobody trusts.
4. Use the verdict bands and the platform guide at the back before you talk to a single vendor.

### 1. Data Source Inventory (/8)

Projects that skip this step routinely discover surprise sources mid-build that blow up the timeline.

- Every feeding system is listed — CRM, ERP, spreadsheets, IoT feeds, third-party APIs
- Each source has a named owner who can answer questions and approve changes
- Format, refresh frequency, and record volume are captured per source
- Extraction method is known and proven viable per source (API, CDC, file drop, direct DB)

### 2. Data Quality Readiness (/8)

Garbage in, garbage out still applies. A sample audit of your top three sources tells you more than any vendor demo.

- A sample audit has actually been run on the top 3 sources — not assumed
- Duplicates, inconsistent naming, and missing keys are documented per source
- Timestamp reliability and time-zone handling have been checked
- Someone is accountable for fixing bad data **at the source**, not just in the pipeline

### 3. Team & Skills Readiness (/8)

Someone must own pipelines, modeling, and governance after go-live — not just during the build.

- A named person will own ETL/ELT pipelines after launch
- Modeling and SQL capacity exists in-house, or the gap is budgeted
- Monitoring and on-call for pipeline failures is assigned
- Analysts can self-serve, or enabling them is explicitly in scope

### 4. Cost Planning (/8)

Budget for more than the licence: storage growth, transformation compute, connectors, and engineering hours.

- Storage and compute modeled against expected volume and query load
- Costs modeled at 12 and 24 months, not just launch day
- Connector, integration, and BI tooling costs included

- Engineering hours to build **and maintain** pipelines are in the budget

## 5. Platform Fit — Cloud vs On-Prem (/8)

The right choice depends on data volumes, compliance requirements, and in-house infrastructure expertise — not on hype.

- Data residency and compliance constraints are written down
- Selection criteria are agreed **before** vendor conversations start
- Usage-based billing exposure is understood and capped or alerted
- Existing in-house infrastructure skills are matched against the candidate platforms

## 6. Scope & Governance (/8)

These are the checks that separate a pilot that proves value from a program that stalls.

- The business questions the warehouse must answer are written down first
- Core metric definitions are agreed and documented (revenue, active customer, churn)
- A small pilot is scoped before any full-scale rollout
- Access, PII handling, and retention policies are defined before load, not after

## Your Verdict

| Total /40 | What it means                     | Next move                                                                       |
|-----------|-----------------------------------|---------------------------------------------------------------------------------|
| 33–40     | Ready to build.                   | Move to platform selection and one scoped domain — not a big-bang migration.    |
| 24–32     | Ready for a pilot, not a program. | Prove one high-value use case end to end, then expand.                          |
| 14–23     | Foundations first.                | Fix your lowest area for a quarter before committing budget.                    |
| 0–13      | Not yet.                          | A warehouse amplifies existing data problems. Start with ownership and quality. |

## Warehouse, Lakehouse, or Neither

| If your reality is...                                                          | The fit is...                                                |
|--------------------------------------------------------------------------------|--------------------------------------------------------------|
| Mostly structured data, BI and reporting demand, a SQL-first team              | <b>Cloud data warehouse</b> — fastest time to value          |
| Mixed structured plus semi/unstructured, ML ambitions, engineering capacity    | <b>Lakehouse</b> — more flexible, more operating burden      |
| Strict data residency or compliance constraints, existing infrastructure staff | <b>On-prem or hybrid</b> — higher upfront cost, full control |

| If your reality is...                                    | The fit is...                                                            |
|----------------------------------------------------------|--------------------------------------------------------------------------|
| Under ~10 source systems and reporting needs already met | <b>Neither yet</b> — invest in modeling and quality inside what you have |

## The Seven Pitfalls That Derail Warehouse Projects

1. Starting the build before defining what business questions the warehouse must answer.
2. Underestimating data cleansing and transformation effort — usually the largest line in the plan.
3. No clear owner for data governance and quality after launch.
4. Choosing a platform on hype rather than actual workload and team fit.
5. Skipping a small pilot before a full-scale rollout.
6. Treating the warehouse as a project with an end date rather than a system with an operating cost.
7. Building for a reporting audience that was never consulted and does not adopt it.

### Want this run against your actual environment?

The **Infrastructure & Cloud Readiness Assessment** applies this framework to your real source systems: mapped inventory, a platform recommendation with cost modeling, and a phased build plan.

**\$997** — credited in full against a modernization engagement started within 14 days.

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