

Checklist

for Product Managers of Data Solutions



Looking to transform your valuable data into a customer-facing product? From concept to design and launch, we've worked with dozens of companies to create success data applications. We hope you can learn from some of the hard-earned lessons and useful resources in our checklist.

	Actions	What we've learned	Resources to learn more	Completion
AUDIENCE	Target users vs. target buyers	Look beyond the analysts who use the data to find the people who see the value and have the budget to back up their interest.	7 Companies That Totally 'Get' Their Buyer Personas (HubSpot) bit.ly/Buyer_Personas	<input type="checkbox"/>
	Understand users' data fluency	You'll find a lot of variation in the users' ability to work with data. How can you thrill data junkies while supporting novices?	Data Is Useless Without the Skills to Analyze It (HBR) bit.ly/data-without-skills	<input type="checkbox"/>
	Fit users' workflow	An engaging solution fits into users' existing processes, delivers data in the right format, and is timely for decision-making.	Form and function in data delivery (Juice) bit.ly/data-form-function	<input type="checkbox"/>
	Inform user actions	Many solutions provide data that is interesting but doesn't connect to decisions. What information can people act on?	Choosing the Right Metric (Juice) bit.ly/30Days-Metric	<input type="checkbox"/>
	Balance flexibility vs. guided analysis	Too much flexibility puts the burden on users to find answers. Too little flexibility is frustrating and won't serve a broad audience.	How to Tell Stories with Data (E. Segel) bit.ly/stories-with-data	<input type="checkbox"/>
DATA	Get the right data	All data is not created equal. Find the best data with the most valuable insight.	More Meaningful Big Data bit.ly/meaningful-data	<input type="checkbox"/>
	Choose your metrics	Apply unique or specialized metrics that make the data highly valued in your industry.	Franken-measures (Juice) bit.ly/franken-measures	<input type="checkbox"/>
	Make your data special	Spend time with your data. Do the analysis and understand its value.	Big Data + Intimate Stories (Juice) bit.ly/data-intimate-stories	<input type="checkbox"/>
	Know what's fair game	Be aware of the laws and constraints around sharing your data internally and externally.	Privacy requirements (Teach Privacy) bit.ly/data-privacy-security	<input type="checkbox"/>
DESIGN	Define product architecture	Content modules, visualizations, and features are woven together into a structure to make it easy for users to accomplish their goals.	The Dribbblisation of Design bit.ly/dribbblisation	<input type="checkbox"/>
	Plan for data variation & outliers	The design needs to anticipate the worst-case scenarios for data. E.g. sparse data, null values, odd distributions, and long labels.	Random Data Generator bit.ly/random-data-gen	<input type="checkbox"/>
	Enable sharing	Users will want to share your data, collaborate with colleagues, and distribute their findings. Consider features for capturing and exporting user parameters, configurations, and annotations.	InVision's prototyping app has beautiful ways for sharing content bit.ly/invision-app	<input type="checkbox"/>
	Create logical flow	Provide a guided path for users to explore and find insights. Help your audience by giving them an obvious place to start and the visual indicators to deepen their analysis.	Guide to Dashboard Design, see Pt. 2 (Juice) bit.ly/guide-dash-design	<input type="checkbox"/>
	Write clear labels and description	Use plain, jargon-free language to explain the data. Craft titles, labels, and legends that explain the meaning of the data and descriptions of actions to be taken with the results.	8 Rules for Great Writing (K. Vonnegut) bit.ly/write-with-style	<input type="checkbox"/>
DELIVERY	Focus on customer development	Start small by thinking about discrete data applications that solve real customer problems and answer their questions.	Four Steps to the Epiphany (S. Blank) stanford.io/clo4lu	<input type="checkbox"/>
	Prioritize features	Novel and fun features can outpace their need. Make sure features line up with company's goals.	60 second business case (J. Brett) slidesha.re/S8YnvQ	<input type="checkbox"/>
	Find the right price	Ask users how they plan to use the product and assess the value they will derive.	KISS Metrics on Pricing bit.ly/kissmetrics-pricing	<input type="checkbox"/>
	Run experiments	When you're not sure (and you rarely will be), create an experiment, learn and move on.	Run Experiments to Tackle Risks (A. Maurya) bit.ly/run-experiment	<input type="checkbox"/>
	Reach customers	How do you get marketing budget without proven sales? Find early adopters, excel at service, and ask for referrals.	Why I Hate Funnels (B. Chestnet) bit.ly/hate-funnels	<input type="checkbox"/>