



Worksheet: Data 360 Checklist and Considerations

Use this checklist to plan your implementation strategy for Data 360.

Stakeholders

Use Cases

Concepts

Architecture

Data Sources

Profile Rulesets

KPIs

1 Identify Project Stakeholders

Identify individuals that need to be involved in implementation, for example business users or IT managers with credentials.

STAKEHOLDER NAME	ROLE/TITLE	EMAIL ADDRESS	RESPONSIBILITY	NOTES
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Identify Data 360 Users

Review the standard Data 360 [permission sets](#).

USER'S NAME	USER'S EMAIL ADDRESS	ROLE	PERMISSION SET	NOTES
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Define Use Cases

Get inspired by use cases in the Trailhead modules, [Data 360 Use Cases](#) and [Real-Time Use Cases in Data 360](#).

USE CASE

ASSOCIATED SYSTEMS

ASSOCIATED
STAKEHOLDERS

NOTES

Gather Requirements

Determine user and business requirements for each use case.

Discuss data residency requirements.

Identify external factors for compliance or regulatory requirements.

REQUIREMENT

TYPE

NOTES



3 Review Key Concepts

Billing and Limitations

Understand [data usage types](#) that impact billing.

Complete the Trailhead module, [Data 360 Credit Consumption: Quick Look](#).

Understand [Data 360 limits and guidelines](#).

Data Strategy Decisions

Complete the Trailhead module, [Data Spaces in Data 360: Quick Look](#).

Complete the Trailhead module, [Data 360 Governance: Quick Look](#).

Complete the Trailhead module, [Data Cloud One](#).

Complete the Trailhead module, [Ethical Data Use Best Practices: Quick Look](#).

Review the module [Data Quality](#).

Data Model Concepts

Review the [Customer 360 Data Model](#) for Data 360 Trailhead module.

[View reference doc](#) for data model objects.

Review all [requirements](#) for mapping.

Complete the Trailhead module, [Data 360 Connectors and Integrations](#).

Learn about Zero Copy integrations in the [Data 360 with Zero Copy](#) Trailhead module.

Complete the Trailhead module, [Data Identity in Data 360](#).

Learn about the available [Salesforce Connectors](#) and the standard [Salesforce CRM Connector](#).

4 Discuss Provisioning and Architectural Decisions

Analyze your existing architecture.

View information on [Data 360 architecture](#) options.

If using Data Cloud One, select a Data 360 Home Org.

Identify if you need a Data 360 [sandbox](#).



5 Identify Data Sources and Integrations

Consider [data formats](#) including the structure of date/time data types.

Bookmark the [Data 360 Integrations guide](#).

Identify relevant and duplicate APIs.

Analyze your current data:

- Evaluate data hygiene for each data source.

- Determine what data source has the most up-to-date data.

Determine your data or activation targets (where you want to [share or act on data](#)).

DATA SOURCE	DATA SOURCE OWNER/STAKEHOLDERS	TYPE OF DATA	UNIQUE IDENTIFIER	NOTES
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6

Plan for Unified Profile Rulesets

Identify rules to [unify profiles](#).

Identify what data is shared across sources (email, first name, id, and so on).

RULESETS

MATCHING CRITERIA

RECONCILIATION RULE

7

Determine KPIs

Identify success measures and goals.

Identify key performance indicators (KPIs) that you'd like to track to show return on investment (ROI).

GOAL

DATA NEEDED

NOTES

Examples: Increase Sales Revenue, Increase Propensity to Buy, Decrease Cost per Ticket.

