



# Worksheet: Data Cloud Checklist and Considerations

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

- Stakeholders
- Considerations
- Use Cases
- Users
- Data Sources
- Ethical Use of Data
- Data Model Concepts
- Identity Resolution
- Segmentation
- Insights
- Current Data

## 1 Identify All Project Stakeholders

| STAKEHOLDER NAME | ROLE/TITLE | EMAIL ADDRESS | RESPONSIBILITY | NOTES |
|------------------|------------|---------------|----------------|-------|
|------------------|------------|---------------|----------------|-------|

## 2 Review Account Requirements and Considerations

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

Understand [Data Cloud Limits and Guidelines](#)



# 3

## Define Use Case(s)

USE CASE

ASSOCIATED SYSTEMS

ASSOCIATED  
STAKEHOLDERS

NOTES

Examples:  
 Create audience segments to be used in Marketing Cloud Journey Builder.  
 Unify data from Sales Cloud and Marketing Cloud to create unified profiles of customers.

# 4

## Identify Users

Review the standard Data Cloud [permission sets](#)

USER'S NAME

USER'S EMAIL ADDRESS

ROLE

PERMISSION SET

NOTES



# 5 List Data Sources and Integrations

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

| DATA SOURCE | DATA SOURCE OWNER/STAKEHOLDERS | TYPE OF DATA | UNIQUE IDENTIFIER | NOTES |
|-------------|--------------------------------|--------------|-------------------|-------|
|-------------|--------------------------------|--------------|-------------------|-------|

# 6 Review Ethical Use of Data Content

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

Learn more about [Ethical Use of Data](#) in the Data Platform Trailmix

Review help content for [Ethics, Privacy, and Consent](#)



## 7

## Understand Data Model Concepts

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

Review data model concepts [data model subject areas](#)

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

Review all requirements for [mapping](#)

Discuss use of packages and [data kits](#)

## 8

## Discuss Identity Resolution

Identity resolution is the process of identity management by means of matching and reconciling data about people into a comprehensive view called unified profiles. Identity resolution is powered by rulesets and creates unified and link objects.

Determine if you will use identity resolution to [unify profiles](#)

Review [data modeling requirements](#) for using individual entity rulesets

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

## 9

## Identify Segmentation Needs

If using Data Cloud for marketing purposes, determine marketing goals and common segmentation needs

Review the concept of [Segment On](#) when building segments for individual

Identify what [activation targets](#) are needed

# 10

## Determine Insights

Review the concept of [calculated insights](#)

Identify any real-time data that could be used to create [streaming insights](#) and [data actions](#)

Identify any metrics that should be pre-calculated for use in segmentation

| METRICS GOAL | DATA NEEDED | NOTES |
|--------------|-------------|-------|
|              |             |       |
|              |             |       |
|              |             |       |
|              |             |       |

# 11

## Analyze Your Current Data

Review the module [Data Quality](#)

Review data sources and ask these questions:

Which source has the most up-to-date data?

How clean is your data?

How much duplication exists?

