Advisory Audit

A strategic assessment of your data flows, customer data pipelines and recommendations on how to make them cleaner, faster and more resilient

Overview

An immersive discovery program to uncover cross-functional data-driven pains and identify actionable insights in 3 weeks. Our prioritized recommendations include ways to improve data flows, schemas, and leverage of segment capabilities to realize your CDP goals and strategic objectives.

Activities

- Interactive discovery
  Of your team's pains, gains, goals, and fears around customer data
- Detailed Analysis
  Of the data flowing through your Segment workspace today
- Interactive Visualization
  Of your customer data architecture today...and its potential
- Synthesis & reconciliation
  Of your cross-functional pains/gains/goals/fears with opportunities for improvement around data flows and schemas
- Iterative validation
  Of our recommendations to ensure strategic alignment
- Collaborative prioritization
  Of our final recommendations to drive cross-functional buy-in
- Detailed documentation
  Of our presentations, analyses, insights & recommendations

Outcomes

- A Clear Picture
  Of today's data pain points across teams & BUs
- Strategic Recommendations
  To address key pains and unblock needs
- A Prioritized Action Plan
  To make fast and lasting improvements

Best if you’re...

- Adding many new teams or BUs into Segment
- Trying to simplify your schemas and event naming conventions across teams and sources
- Trying to drive stronger alignment across teams and BUs using Segment
- Facing long delays in “time to action” on customer data due to ETL flows or other pipeline processes

Pricing: Ask your Segment salesperson
Timing: Typically 3 weeks
Led by: A Segment Solutions Architect
Required from you (and time commitments)
Business stakeholders to inform goals & KPIs (2N)
Marketing & product team owners to represent needs (2N)
BI, Engineering & Data Ops owners to represent needs (2N)

For more information please contact our sales team or visit segment.com/services

Disclaimer: Segment makes no warranties, express or implied, in this data sheet.
Advisory Audit

Engagement Details

Methodology

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Discovery
- 1. Kickoff Immersive (6/12)
- 2. Initial Synthesis & Validation (6/12)
- 3. Initial Hypothesis Surfaced (due Aug 12)
- 4. Synthesis & Validation (2/12)
- 5. Final Synthesis & Validation (2/12)
- 6. Readout Meeting (3/12)
- 7. Audit Complete (due Sep 21)
- 8. Hypothesis Fully Validated (due Aug 13)
- 9. Review KPIs today & tomorrow
- 10. Cross-source events
- 11. List active workstreams
- 12. Context & Goals Captured

Synthesis
- 1. Kickoff Immersive (6/12)
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Recommendation
- Provides advisory analysis and action planning for...
  - 1 Segment workspace
  - 10 Segment sources
  - Events, properties, traits and destinations across all sources
  - 8 cross-functional stakeholders

Artifacts

Interactive Data Flows
Summarizing your current and future potential workspace architectures

Audit Insights Deck
Summarizing our analyses, findings and prioritized recommendations

Add-Ons
We can adjust the typical timing above to accommodate any of the following:

- Additional Segment workspaces
- Additional Segment sources
- Non-Segment schemas
- Larger groups of stakeholders
- Focused auditing only on schemas (no workspace or architectural insights)
- Custom documentation of the recommended unified schema
- Other custom tooling to enable easier discovery, auditing and mapping of especially large schemas
- Follow-on Jumpstart guidance

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