





Data Audit
Worksheet

RHEA+KAISER

PURPOSE OF THIS WORKSHEET

This worksheet will guide you through auditing your current data sources, identifying gaps and setting a foundation for better data utilization in your marketing efforts.

HOW TO USE THIS WORKSHEET

- **Review each section:** Start by listing all of your data sources, then evaluate their quality
- **Prioritize your efforts:** Focus on high-quality, high-impact data sources
- **Plan improvements:** Assign clear action items and deadlines to address gaps or inefficiencies
- **Track progress:** Revisit this worksheet regularly to ensure your data strategy evolves alongside your business needs

The charts contain editable fields so you can easily add your information. We've pre-populated some fields and provided some examples to help you get started.

SECTION 1: IDENTIFY YOUR DATA SOURCES

List all the data sources currently available to your ag retail business. Include details such as where it's stored, how it's used and any challenges, which can include access, reliability, incomplete information and more.

Data Source	Description	Where It's Stored	How It's Used	Gaps or Challenges
CRM System	***Ex:*** **Salesforce**			
Point-of-Sale Data				
Social Media Analytics				
Website Analytics				
Inventory/ Sales Report				

SECTION 2: ASSESS DATA QUALITY

Evaluate each data source using criteria such as accuracy, completeness, timeliness and relevance. Use a scoring system to prioritize improvements.

Key questions to consider:

- Are there gaps or missing information?
- Is the data up-to-date and reliable?
- Is it relevant to your current marketing objectives?

Data Source	Accuracy	Completeness
	High/Med/Low	High/Med/Low

Timeliness	Relevance	Overall Score
High/Med/Low	High/Med/Low	High/Med/Low

SECTION 3: PRIORITIZE YOUR DATA SOURCES

Rank your data sources based on their importance to your marketing strategy. This helps focus on the most impactful areas first.

Rank	Data Source	Why It's Important
1		
2		
3		
4		
5		
6		

SECTION 4: IDENTIFY TOOLS AND RESOURCES

List the tools or platforms you currently use to manage or analyze your data. Evaluate their effectiveness and identify missing tools.

Reflect if there are tools missing from your stack that could fill gaps or improve efficiency.

Action Item	Owner	Deadline	Status
Ex: **Consolidate CRM and POS data**	***Ex:*** **Marketing Manager**	***Ex:*** **End of Q3**	***Ex:*** **In progress**

SECTION 5: ACTION PLAN

Outline immediate next steps to improve your data strategy. Assign clear action items, owners, deadlines and track the status of each initiative.

Tool	Purpose	Satisfaction (1-5)	Comments


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