

Data Confidence Starter Checklist

For additional tips & support:
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Instructions: Go through this checklist before your next meeting, report review, or decision involving data. Check off items as you go. No fancy tools needed. Just curiosity and these powerful questions. Aim to build one small habit per week.

From Data Doubt to Confident Impact

Quick Overview – The 4 Parts

1. **Mindset Check** → Build your inner confidence first (start here every time!)
2. **Before Looking at Any Data** → Ask the 5 core questions to set yourself up for success
3. **When Reviewing Charts, Dashboards, or Reports** → Spot-check for clarity and trustworthiness
4. **Turning Insights into Action** → Close the loop and create real business impact

Part 1: Mindset Check – Build Your Inner Confidence

- ☐ I remind myself: Data is a tool to help me, not scare me. I don't need to be a "numbers person" to use it well.
- ☐ I accept that it's normal to feel unsure at first. Confidence comes from asking good questions, not knowing everything.
- ☐ I give myself permission to say "I don't understand this yet" instead of staying silent.

Part 2: Before Looking at Data, Ask These 5 Core Questions

- ☐ What exact **business question** am I trying to answer? (example: "Why are sales dropping in Q2?" not just "Show me sales data.")
- ☐ What assumptions am I already making and could the data challenge them?
- ☐ Who created/collected this data, and **why**? (Helps identify if the data is biased or incomplete.)
- ☐ How **fresh/recent** is this data? (Old data can lead to bad decisions.)
- ☐ What might be **missing** from this picture? (e.g., customers who left, seasonal factors.)

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Part 3: When Reviewing Charts, Dashboards, or Reports – Spot-Check Confidence

- ☐ Are comparisons fair? (e.g., same time periods, same groups, apples-to-apples.)
- ☐ Do the numbers feel realistic for my business knowledge? (Gut-check for obvious errors.)
- ☐ What story is this data telling and does it align with what I already know about the business?
- ☐ If I showed this to a colleague, could they understand the main point in 30 seconds?
- ☐ What might be **missing** from this picture? (e.g., customers who left, seasonal factors.)

Part 4: Turning Insights into Action – Close the Loop

- ☐ What is the **one key takeaway** I can act on right now?
- ☐ What follow-up question should I ask the data team/analyst? (e.g., "Can we see this broken down by region?" or "What if we filter out outliers?")
- ☐ How will this data help me make a better decision or create more impact? (Link it back to revenue, clients, efficiency, etc.)
- ☐ I feel more confident after this review: Yes / Somewhat / Still working on it (note why!)
- ☐ What small next step can I take this week based on this insight? (e.g., test one change, share one finding.)

Bonus Confidence Boosters (Quick Wins to Practice)

- Pick one report/dashboard you already see → run through Part 2 & 3 questions.
- At the end of each week, note one "data win" (even tiny) in a quick journal or note app to track progress and build momentum.
- Bookmark 1–2 free resources (like simple Excel tips or data viz basics videos) and watch one short clip per week. no deep dive needed.
- In a team huddle or email, ask "What one thing does this data tell us we should try?" to practice turning numbers into action collaboratively.

You're already transforming how you show up at work with data confidence.

Use this checklist daily or weekly. Watch doubt become confident decisions that advance your career while driving meaningful business impact.