



# The Domain-First Metadata Deployment Checklist

Use this checklist to execute a controlled, high-ROI metadata management rollout. Do not proceed to the next phase until all items in the current phase are checked off.

## Phase 1: Business Alignment & Governance

- **Identify the Pilot Domain:** Selected a single, high-visibility reporting area (e.g., Q3 Marketing ROI or Monthly Churn).
- **Define the Core Metric:** Pinpointed 1-3 critical KPIs that executives frequently debate due to conflicting data.
- **Assign Business Stewardship:** Appointed a specific subject matter expert (SME) to own and approve definitions for this domain.
- **Establish the Governance Framework:** Aligned the approval workflow with standard practices (e.g., DAMA-DMBOK principles).

## Phase 2: Technical Integration & Engineering

- **Connect the Primary Warehouse:** Linked the metadata tool directly to your main cloud storage (e.g., Snowflake, BigQuery) for the pilot domain.
- **Automate Technical Lineage:** Successfully ran ingestion scripts to map physical tables without manual SQL parsing.
- **Implement Data Contracts:** Enforced structural guarantees (using tools like dbt) before data reaches the catalog.
- **Verify API Access:** Confirmed engineering teams can programmatically push context via CI/CD pipelines.

## Phase 3: AI Readiness & Semantic Structuring

- **Audit the Semantic Layer:** Ensured business logic is defined clearly enough to feed Retrieval-Augmented Generation (RAG) pipelines.
- **Link Operational Metrics:** Connected query execution times and access logs to cloud cost optimization (FinOps) dashboards.



- [ ] **Draft Plain-English Glossaries:** Translated the top 20 most queried tables into terms an AI agent or non-technical user can accurately interpret.

#### **Phase 4: Workflow Adoption & Scaling**

- [ ] **Embed in BI Tools:** Pushed catalog descriptions directly into the analysts' primary dashboard interfaces to eliminate standalone portals.
- [ ] **Conduct User Training:** Walked the early adopters through the new Google-like search capabilities.
- [ ] **Measure Pilot ROI:** Documented the reduction in engineering hours spent searching for data assets over a 30-day period.
- [ ] **Plan Next Domain:** Prepared the operational playbook to replicate this success in the next business department.