



SaNDAl Sample Project Plan

A CLEAR ROADMAP FROM DAY 1 TO LAUNCH — AND BEYOND.

Our projects follow a simple, structured process designed to keep your team informed, supported, and confident every step of the way. Below is a typical timeline for a standard BI or BI+AI engagement.

WEEKS 1–2 — DISCOVERY & ASSESSMENT

Learn your goals and review your current data.

We begin by understanding your mission, your programs, and the outcomes you want to measure.

During this phase, we



Meet with key staff to learn how data is currently collected and used



Review existing spreadsheets, forms, systems, and reports



Identify the “must-have” metrics for your first dashboard



Map data sources and highlight gaps or inconsistencies

Deliverables



Project kickoff



Data inventory



Data inventory



Data inventory

WEEKS 3–5 — DATA INTEGRATION & FIRST DASHBOARD BUILD

Connect your data sources and create your first dashboard.

Once the roadmap is clear, we begin building the foundation

Aggregate all data sources into one location

Clean and prepare the data (duplicates, formatting, fields)

Develop your first interactive dashboard based on your priority metrics

Hold walkthrough sessions to ensure staff understand and can use their new tools

Deliverables



Unified data hub



First dashboard (v1)



Data cleanup + standardization



Training session #1

WEEKS 6—8 — REPORTS, VISUALS & STORYTELLING

Add reports and visuals that tell your story.

Now that the foundation is in place, we enhance your system with visuals that make your impact easy to share.



Add charts, filters, and insights to deepen understanding



Build one-pagers, funder-ready visuals, or program report



Tune dashboards based on staff feedback



Create basic data-to-storytelling language for newsletters, grants, and presentations

Deliverables



Dashboard (v2) with advanced visuals



Storytelling-ready charts



Report templates



Training session #2

ONGOING — SUPPORT, UPDATES & QUARTERLY OPTIMIZATION

Quarterly check-ins and updates to keep everything fresh.

Once your system is live, we stick with you. SaNDAl becomes your long-term BI/AI partner.

Each quarter, we



Review your dashboards and usage trends



Add new views or metrics as your needs grow



Refresh data models and fix emerging issues



Support program expansions or new reporting needs

Deliverables



Quarterly health check



Enhancement recommendations



System updates



Continuous staff support

READY TO TAKE THE NEXT STEP?

Book a Free AI or BI Discovery Call - Whether you're new to data or ready for automation, SaNDAl will walk with you — step by step.

