A clear beginning. A reviewable result.

Item data readiness: a fictional engagement example

This packet shows how DNAction can structure a bounded project. It contains illustrative records and decisions, no client data, and no statement of completed client results. It is not a quote, contract, or fixed delivery commitment.

The scenario

A distributor plans to provide an item file to an ERP implementation partner. Similar descriptions and mixed units make it unclear which values should be accepted. The example assumes one CSV with 500 records; a real proposal specifies actual source coverage and limits.

The intended outcome

Prepare a reviewable output file and a complete record of unresolved questions. Business meaning stays with the customer. The ERP partner separately reviews whether the output meets target-system import requirements.

Included in this example	Outside this example
One source snapshot; item number, description and unit-of-measure review.	ERP configuration, production migration and live system changes.
Rule proposals, change log, reviewed output and exception register.	Automatic merging of uncertain items, valuation review or unsupported unit conversions.
Review checkpoint and handoff summary.	Ongoing support or new source files unless separately agreed.

Define what changes hands.

Deliverable	Content	Acceptance evidence
Source register	Filename, received date, version, record count, fields and authorized owner.	Customer confirms source coverage.
Rule sheet	Approved field rules, examples, exceptions and approval references.	Named data owner records approval.
Reviewed output	Stable source identifiers; proposed values consistent with approved rules.	Reconcile records and validate each agreed field.
Change and exception logs	Source IDs, before/after values, rule references; open questions and owners.	Every change and unresolved issue is traceable.
Handoff summary	Files delivered, open items, decisions, next owners and intended import review.	Customer acknowledges receipt; ERP partner acceptance remains separate.

Review sequence

1. Confirm the authorized source and field meanings.
2. Propose and approve the working rules.
3. Prepare proposed output and review exceptions.
4. Run acceptance checks and deliver the handoff pack.

Timing and changes

The real proposal sets dates, customer review windows, access requirements and fees. Additional files, fields, locations or workflows trigger a written scope review before extra work starts. This example promises neither a price nor a completion date.

Keep uncertainty visible.

Fictional decision log

Reference	Observed question	Proposed action / status	Decision owner
ITEM-014	EA and Each appear in the same unit field.	Standardize to EA only after the unit rule is approved.	Customer data owner
ITEM-027	Same description, different item numbers.	OPEN: keep separate pending identity confirmation.	Customer product owner
ITEM-041	BOX has no documented pack size.	OPEN: request an approved conversion; do not infer it.	Customer purchasing owner

A useful decision record

Record the source identifier, question, proposed action, business rationale, approver, date and supporting reference. Keep open items open until an authorized person supplies the answer. A field that looks consistent can still be wrong in business terms.

Responsibility boundaries

Customer: authorize files, explain business meaning, approve decisions and confirm receipt.
DNAction: perform the agreed review, document evidence, apply approved rules and prepare the handoff.
ERP partner: supply target requirements, review mappings and import suitability, and own the separately agreed implementation plan.

Data handling

Use authorized files and suitably redacted examples. Before transfer, agree the exchange method, permitted access, working storage, retention/deletion, and who may approve changes. The public inquiry form is not a place to send source files or credentials.

Agree what done means.

Sample acceptance checklist

Check	Pass condition	Evidence to retain
Source reconciliation	Actual input count is accounted for in the output or exception register; no unexplained loss.	Count reconciliation and source version.
Stable references	Every output record and log entry resolves to a source identifier.	Identifier validation result.
Approved rules	Every changed value cites an approved rule or explicit approved decision.	Rule sheet and decision references.
Business ambiguity	Unconfirmed duplicates and missing conversions remain flagged; no unsupported merge or conversion.	Exception register with status and owner.
Delivery integrity	Delivered files open correctly and match the stated filenames, fields and versions.	Delivery manifest and review receipt.
Handoff clarity	Open items and next owners are documented. Target-system import acceptance is separately identified.	Customer acknowledgment and partner review plan.

Record the actual result

For each check, record pass, fail, or not run; who reviewed it; when; and the evidence location. Resolve failures or agree a documented disposition. These sample criteria are not completed test results.

Keep acceptance specific

A reviewed preparation file is not proof of a successful ERP import or go-live. Customer acceptance of the agreed readiness deliverables and ERP-partner acceptance of import suitability are separate decisions.

Leave the next team a usable starting point.

Sample delivery manifest

Example file	Purpose
01_source_snapshot.csv	Unchanged received source; version recorded in the register.
02_rules_and_decisions.pdf	Approved rules and referenced business decisions.
03_reviewed_output.csv	Reviewed proposed values and stable source references.
04_change_log.csv	Before/after values with rule and approval references.
05_exceptions.csv	Unresolved questions, current status and accountable owners.
06_acceptance_and_handoff.pdf	Actual check outcomes, delivery acknowledgment and next steps.

These filenames describe a hypothetical delivery. The datasets listed above are not included in this sample packet.

Handoff conversation

Confirm what was delivered, what remains open, who owns each decision, and what the implementation partner needs next. Document whether support is included, its boundaries, the contact route, and how further changes are scoped.

Make this fit your business

A real DNAction proposal defines the source coverage, deliverables, review checkpoints, acceptance criteria, responsibilities, data handling, schedule, price and support terms for your engagement.

Discuss a practical starting point

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