



Levo Insight

DATA. UPLIFTED.

The Data Integration Readiness Scorecard

Rate how true each statement is for your business today. Add up your score at the end to see where you stand.

1 = Not Yet

2 = Sometimes

3 = Mostly

4 = Consistently

Data History

We have at least one full season or year of consistent data collected.

Our past data is stored somewhere we can actually access it today.

Process Consistency

We use one standard template across all our forms.

Every quote and job gets a consistent client and job ID.

Our team fills out forms the same way, every time.

We submit data on a set schedule, not “whenever we get to it.”

Systems in Use

Our team uses the same core systems — not a mix of personal spreadsheets and software.

We could name every platform our business data currently lives in.

Any paper forms we use get transcribed into a spreadsheet or scanned in regularly.

Team & Access

Only specific, trained people are allowed to enter or edit our data.

Everyone entering data follows the same process.

We have a plan for training new hires on our data process.

Turnover hasn't caused our data process to fall apart in the past.



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Audits & Accuracy

We check for duplicate or missing entries on a regular schedule.

Errors get caught and fixed within days, not months.

Someone on our team is responsible for reviewing data accuracy.

Your Score

Add up your numbers from the 5 sections above.

Maximum score: 64

Total Score

(Auto-calculates in Adobe Acrobat Reader. If your PDF viewer doesn't auto-total, just add your numbers manually — same result.)

52–64 — Ready Now

Your foundation is solid. Integration will go smoothly.

32–51 — Getting There

A few gaps worth closing first, but you're close.

Below 32 — Build the Foundation First

Worth revisiting the Data Hygiene Guide before integrating.

Curious what “ready now” actually looks like in practice?

Reach out — we'll walk through your results together.