



Getting Started Guide

Data Owners



At Habu, our mission is to help companies thrive and innovate by realizing the full value of their data, as well as data from trusted partners, in today's privacy-first era. We do that through a shared success model that initially focuses on getting Habu integrated as quickly and as efficiently as possible, then adjusts our joint partnership roles in lockstep as your clean room program grows.

Adoption Phase	Habu Service Model	Exit Criteria
Phase 1: <i>Discovery</i>	Habu in a high-touch analysis role to assess business requirements.	Defined roles and responsibilities, and the implementation plan is developed and agreed upon.
Phase 2: <i>Implementation</i>	Habu in a high-touch services role to establish a sandbox clean room.	Successful query of customer first-party data against synthetic data in sandbox clean room.
Phase 3: <i>Production</i>	Habu in a high-touch support role, providing "ride along" training to support initial collaboration.	First production clean room query is live with a partner.
Phase 4: <i>Replication</i>	Customer is "hands-on-keyboard" with active support and proactive engagement from Habu.	Successful replication of a use case to a second live clean room partner.
Phase 5: <i>Scale</i>	Customer can "self-serve" clean room utilization with passive Habu support.	Scaling data and/or query templates across three or more clean rooms, with multiple use cases.
Phase 6: <i>Maturity</i>	Customer has built automation on top of Habu to deliver more advanced clean room services.	Multiple segments of partners served with varied use cases, data and code assets, with distinct commercial models.

In this *Getting Started Guide*, we outline our proven approach for the first three phases, detailing the roles and responsibilities, sequential steps, milestones, and more that bring Habu data clean room software from initial planning to full operation. We will also offer some guidance about how we work with you during the remaining phases to scale your operations and advance your data clean room maturity.

Roles & Responsibilities

Both Habu and your organization play vital roles during the successful implementation of your first data clean room. Each team takes on roles and responsibilities aligned to its core strengths and areas of expertise.

Habu Customer Success Team

Your Habu Customer Success team works with various groups within your organization to understand your unique goals and build a long-term partnership. They will be comprised of:

- **Success Lead** to coordinate status calls, document technical requirements, provide initial training and enablement (technical and GTM), and conduct ongoing business reviews.
- **Analyst Lead** to support use case definition and creation.
- **Executive Sponsor** to harness additional Habu resources as needed.

They typically use a “RACI” matrix to clearly define the roles and responsibilities of all individuals or teams involved in the process. If you’re unfamiliar with a RACI, it’s a popular and valuable tool for project management where each task or decision is listed, along with who performs which role for that particular task.

- **Responsible:** The person or team responsible for performing the task or making the decision. One person or team should be assigned as responsible for each task or decision.
- **Accountable:** The person who is ultimately answerable for the correct and thorough completion of the task. This individual ensures that the right people are assigned to the task and that it is completed appropriately.
- **Consulted:** Individuals or teams that need to provide input before the task can be completed. These are the people whose opinions or expertise should be sought before making a decision or taking action.
- **Informed:** Individuals or groups that need to be kept informed about the progress of the task or decision. They may not be directly involved in the work but must stay in the loop.

You can find a sample RACI matrix in the Appendix to give you a good idea of the considerations needed to implement Habu successfully. Some of the internal teams that are typically involved during the first three phases of adoption include:

Product/Analytics Team

In most organizations, the Product/Analytics team is empowered to bring the benefits and best practices of data clean rooms to the rest of the organization. They define product goals, drive the implementation process, and ultimately develop and implement key use cases. During the initial phases, the Habu Customer Success team will schedule weekly meetings with the

Product/Analytics team to document technical requirements, support the implementation progress, provide training and enablement, and guide use case development as needed.

Key questions for the Product/Analytics team during the initial *Discovery* phase include:

- What are your goals? How do you define success?
- Do you intend to use SQL for basic analytics, or are you planning something more advanced (e.g., machine learning)?
- Do you anticipate significant customization for each advertiser?
- Do you have dedicated resources to service advertisers who join your clean room?
- How will advertisers consume the reports you generate (e.g., Habu-provided reports and charts, external visualization tools, CSV download, etc.)?
- What is the plan and expected timeline for pilot customers vs. a broader rollout?

Line of Business

Line of Business (LOB) stakeholders can come from many different organizations, including Sales, Marketing, Operations, Finance, and more. While their use cases may be dramatically different, they all share a crucial role in driving the overall adoption of data clean rooms.

Key questions for the LOB team(s) during the initial *Discovery* phase include:

- What accounts are ideal for a pilot rollout?
- How will you frame the market-facing message when speaking with potential partners?
- What sales motion do you plan to use?
- How will your sales team be incentivized and enabled?
- What PR strategy fits your goals and branding?

IT/Engineering

The IT/Engineering team plays a key support role in integration and implementation activities. As experts in cloud infrastructure and database architecture, they will manage the credentials and validate the connections that are essential to establishing links to first-party cloud data sources. Meetings will be ad-hoc to provide training and enablement, assess data readiness, configure advanced operational frameworks, and help to overcome any connectivity, security, legal, and other challenges that surface during the integration process.

Key questions for the IT/Engineering team during the initial *Discovery* phase include:

- What cloud data warehouse does your organization use (e.g., Azure, AWS, Google Cloud, Snowflake, Databricks, etc.)?
- Is the data needed for collaboration ready and available in the cloud?
- What are your InfoSec requirements?
- What are your Legal requirements?
- Does your organization use/require Service Provider-initiated Single Sign-on (SSO)?

Phases of Adoption

Recognizing that all installations are unique, our Customer Success team will work with you to jointly develop a customized implementation plan to fit your business needs, GTM timeline, initial use cases, and your existing software and InfoSec environment. They do that through a proven methodology for initial discovery, software implementation, and use case development. Following this plan will ensure a smoother transition and successful adoption of Habu according to agreed-upon timelines.

Phase 1: Discovery

In this phase, the Customer Success team will work with you to develop a clear vision, goals, and Key Performance Indicators (KPIs) for your data collaboration program. Well-defined goals provide a roadmap toward the specific outcomes and benefits you aim to achieve, aligning efforts and resources toward a common purpose. KPIs serve as the quantifiable metrics to measure success, enabling you to track progress and make informed decisions throughout the implementation process.

Project Kickoff:

- Discuss the project scope, objectives, and success criteria.
- Introduce the project team to key stakeholders.
- Assign roles and responsibilities (via RACI matrix).

Assessment:

- Identify data assets, including how potential collaborators may use its insights.
- Conduct a thorough assessment of current systems and processes.
- Identify security/InfoSec requirements.
- Identify data connectivity requirements for first-party data sources.
- Identify key stakeholders and their expectations.

Implementation Plan:

- Align data collaboration objectives with business goals, and define KPIs.
- Build a foundational legal and compliance framework.
- Develop a detailed project plan with key milestones for the entire implementation.

Communication Plan:

- Develop a communication plan to keep stakeholders informed of progress.
- Establish channels for regular updates and feedback.

Phase 2: Implementation

This phase is focused on establishing the first data clean room environment. All queries use internal first-party data, executed against a sandbox environment that contains synthetic data. This will allow you to safely prototype use cases and verify that everything works as expected, including the privacy controls that you have implemented, before working with live data from potential collaboration partners (in Phase 3).

Infrastructure Setup:

- Ensure that the necessary hardware and software infrastructure is in place.
- Establish the sandbox clean room environment.

Integration:

- Establish connectivity to cloud data warehouses.
- Resolve security/InfoSec concerns.
- Perform User Acceptance Testing (UAT) and document configurations, processes, and any customizations.
- Resolve any final integration issues to ensure that all components work together seamlessly.

Team Training:

- Provide training sessions for the project team on the Habu UI.
- Familiarize team members with the project methodology and tools.

Platform Launch:

- Develop a go-live plan, including a rollback strategy.
- Conduct a final review of all systems and processes.
- Execute the go-live plan.
- Provide post-implementation support to address any issues that arise.
- Monitor system performance and user feedback; update as needed.

Use Case Proof of Concept (POC):

- Develop queries of first-party data against synthetic data in the sandbox environment.
- Build reports and dashboards to measure defined KPIs for the initial use case.
- Verify results and iterate as needed.

Phase 3: Production

In this phase, you'll onboard your first external collaboration partner to officially get your data clean room operation off the ground. Your core team, along with our Customer Success team, may need to educate this partner on the value of data clean rooms and align their workloads for data collaboration.

Partner Enablement

- Identity launch partner (if not done previously).
- Identify key partner stakeholders, including who will manage the data collaboration.
- Perform partner education – on clean rooms, potential use cases, expectations, etc.
- Complete data readiness tasks, including an understanding of what data they will provide and who will prepare it for clean room use.

Use Case Deployment:

- Agree on goals, use case(s), and benchmarks.
- Develop queries of first-party data against partner data in the production environment.
- Establish activation channels (as needed).
- Build reports and dashboards to assess results against goals and KPIs.
- Revisit and update business case and governing strategy documents using client feedback.

Internal Enablement

- Strengthen collaboration between different teams (e.g., product, marketing, sales) to ensure a holistic approach to product development, deployment, and client engagement.
- Arm the sales organization with the toolkits needed to sell the commercialized program.
- Develop robust onboarding documentation (including case studies) that simplifies and standardizes the clean room onboarding process.

Next Steps

After the initial implementation, and the support from Habu that goes with it, your team will be ready to replicate use cases and utilize additional first-party datasets to scale your data clean room operations. The focus during Phase 4 and beyond will be on establishing a refined operating model with the right resources, processes, and standards in place. Your product team will also be equipped to build a rigorous roadmap with detailed specifications, timelines, and milestones to ensure a systematic and well-communicated rollout of products and services.

While your team will be doing the majority of strategy and “hands-on-keyboard” work, our Customer Success team will remain engaged with you to provide ongoing support as needed. They’ll also do periodic assessments of the maturity of your overall data collaboration program, taking into account the following indices, with strategic recommendations to help you progress to higher levels of maturity.

Commercialization Strategy & Enablement	Data Management & Governance	Clean Room Technology Enablement
<ul style="list-style-type: none"> ● Value Proposition and Strategy ● Product Offerings and Services ● Operating Model ● Platform Operations ● Security and Privacy Compliance ● Contracting and Legal 	<ul style="list-style-type: none"> ● Data Uniqueness and Value ● Data Accuracy, Consistency, and Completeness ● Data Governance and Security 	<ul style="list-style-type: none"> ● Integration ● Identity ● Platform Configuration and Management ● Data Querying and Segmentation ● Analytics ● Dashboarding and Reporting



Implementation Checklist

This list of inputs and discovery questions will inform our solution design for Habu data clean room software. By providing this information during initial scoping, you will expedite implementation and time to value.

Cloud Data Warehouse

- AWS
- GCP
- Azure
- Snowflake
- Databricks
- Habu Owned
- Other _____

Region

- US East
- US West
- US Other
- EMEA

Datasets

- CRM
- Audience Segmentation
- Ad Logs
- ID Graph
- Product Catalog
- Metadata
- Transactions
- Other _____

Identifier for your Datasets

- Hashed Email
- Mobile Advertising IDs
- Ramp ID
- LUID
- Other _____

SSO for Habu?

- Yes
- No

Initial Use Cases

- Overlap
- Attribute Index
- Segment Index
- Reach & Frequency
- Closed Loop Attribution
- Incrementality
- ROAS Measurement & Optimization
- Custom Reports
- Other _____

Agency Partner

- Yes: _____
- No

Initial/Potential Collaboration Partners

Partner #1:

Name: _____

Cloud: _____

Partner #2:

Name: _____

Cloud: _____

Partner #3:

Name: _____

Cloud: _____

Partner #4:

Name: _____

Cloud: _____



Roles & Responsibilities (RACI)

This matrix clarifies roles and responsibilities within our teams to ensure effective accountability, streamline project workflows, and mitigate confusion – leading to a more efficient implementation of Habu.

	Responsible	Accountable	Consulted	Informed
Implementation				
Document technical requirements				
Establish data connections				
Configure clean rooms				
Assign datasets to clean room				
Provision queries to clean room				
User/Partner Management & Training				
Set user roles and permissions				
Assign users to roles				
Setup SSO				
Train and enable teams on Habu UI				
Use Case Creation				
Author query templates				
Kick-off runs and generate output				
Provision activation channels				
Lead review of results/action items				
Manage ad hoc query updates				
Ongoing Management				
Onboard/enable new team members				
Submit product ideas and bug reports				
Conduct business reviews and check-ins				



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