

Backfill Philosophy & Process

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Consumers: Systems, Biz Ops, Data, Growth

Background & Context

Backfills can be great tools when wielded properly.

At Ramp, we tend to reach to them as an expected outcome of any problem - system related or not.

As our systems have grown, our needs have changed, and our growth has skyrocketed. It's changed some fundamental thoughts about backfills:

- ⚙️ Backfills to one system touch or impact many systems due to the complex and inter-connected nature of our systems.
- 🕒 Backfills take up a lot of time, even in the most simple of cases.
- 😞 Backfills do not always have clear value and a plan upfront, leading to unmet expectations, and poor execution.
- 💰 Both of these things in turn increase the liability from a backfill and leave each side (requester, and executor) dissatisfied.

For these reasons, we wanted to develop and align on a common philosophy for why, how and when backfills should be used.

Backfill Philosophy 2.0

Backfills are a tool to be used to benefit the business in the right time and context, and **NOT an expected outcome of every data discrepancy or investigation.**

Backfills are a high risk, high leverage process, and as such, **should be treated with care and precision from the systems teams.**

★ **They should not be rushed, done haphazardly and without proper documentation.**

As a team, we should adopt a policy of "**least access required**" to system features and permissions that allow operators to conduct backfills. **Owners of tools should be notified when backfills will occur.**

Backfills should be well-justified, both from a systems reputability perspective and a financial outcomes perspective.

! Because backfills have the potential to distort history in our systems of record, they should be used sparingly.

Examples In Action

Some historicals on backfills to see what is hard vs not hard: [here](#).

In the future, all backfills will have a special tag in the Martech Asana board.

Examples of when its appropriate to backfill:

- Loading contacts into Hubspot from an outside event.
- Loading or creating opportunities that could not be created through systems.

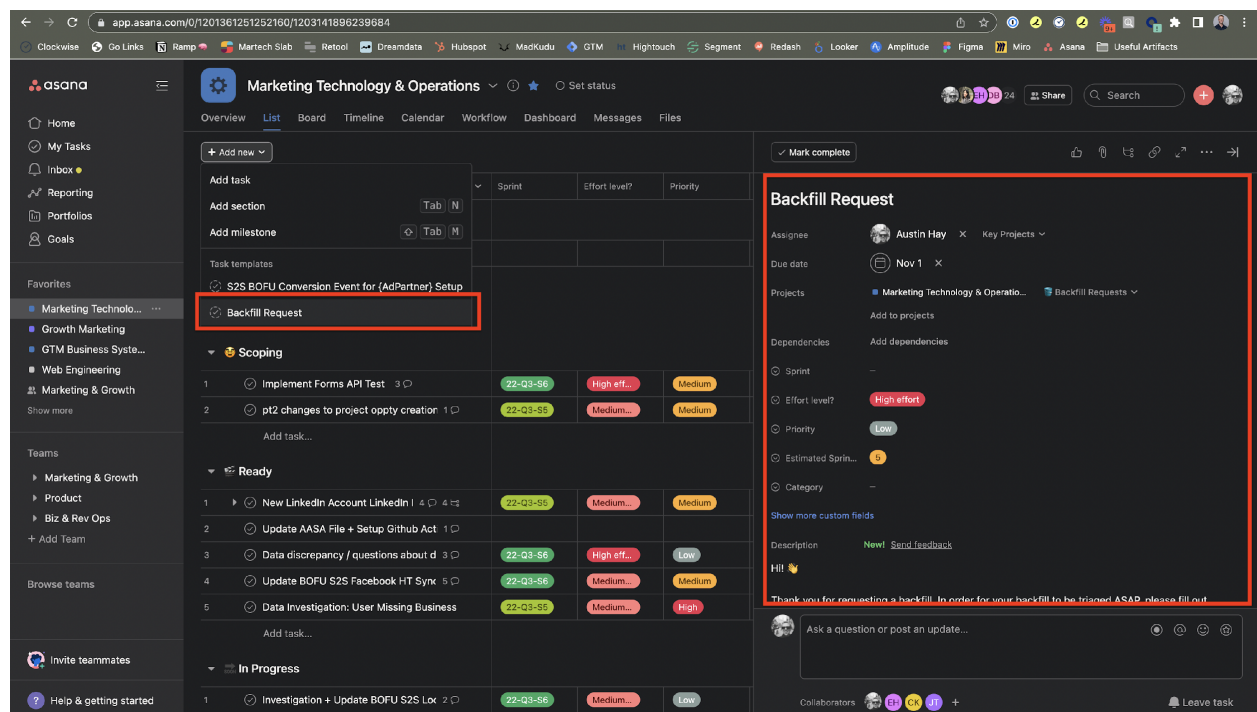
Examples of when its not appropriate to backfill:

- Creating or updating campaigns, campaign members or Primary Campaign Members for a group of contacts that is small or not economically justified.
- Creating or updating opportunities that is small or not economically justified.

Backfill Ticketing Process

Now that we've established some operating norms for backfills, we can adopt a team process on doing backfills.

To request a backfill, use the "Backfill" task request template in the Martech Asana Board ...



Click "Add new" > "Backfill Request" and then on the right hand side, scroll to the description and edit/add all requested information. Once you do this, it will be assigned to the Martech DRI and reviewed.

Backfills are not automatically accepted. They will undergo a review process.
The more detail and justification you provide upfront, the faster the process will go!

Backfill Request Form Details

Backfill Requester: XXXX

When are you requesting this backfill to be completed by?

*Outside of emergency situations, backfills will take 2-4 weeks to complete.
Requesting backfills on shorter timelines will not increase their speed of delivery.*

Is there an investigation for this backfill?

If not, please provide business justification.

What data element(s) do you want backfilled?

Have you spoken to your VP to request this backfill and provided them with business justification?

VP Sponsor: XXXX

Have you set a meeting to discuss this backfill with your systems or data counterparts?

What is the proposed or expected financial or economic value of this backfill?

Backfill Status: Received, Accepted, Rejected, Needs More Information

Backfill Systems DRI Assigned: XXXXX

Backfill Plan: LINK // *To be developed by the Systems DRI.*

Once backfill request has been approved and aligned to a sprint, you will get a systems DRI. Please work with your systems DRI to complete the following Backfill Plan.

Backfills cannot be completed until the backfill plan is reviewed by [Gene Lee](#)
[Austin Hay](#) or [Justin Tung](#)