


DIY Guide

55-min Sprint
Customer Data
Taskforce



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Objective

The Customer Data Taskforce Sprint is a 55-minute whiteboard session designed to audit and align customer data across functional domains (Marketing, Sales, Customer Success, Product, Finance, Operations, Legal) in your organization.



This rapid sprint aims to:

- Verify customer data collection and map it to the customer experience.
- Visually document the customer journey across organizational touchpoints.
- Identify insights from disparate data sources to support executive goals.
- Prioritize three insight workflows for operational improvement and customer experience efficacy over the next 90 days.

This do-it-yourself (DIY) guide provides step-by-step instructions for preparation, execution, and follow-up to ensure a successful sprint.

Pre-Meeting Prep

1-2 weeks prior to the meeting

Action items for CEO/Organizer

Schedule the Session:

Reserve a 55-minute time slot for all functional heads (Marketing, Sales, Customer Success, Product, Finance, Operations, Legal). Ensure a whiteboard or digital whiteboard tool (e.g., Miro, MURAL) is available.

Distribute the Guide:

Share this DIY guide with all participants, emphasizing the need for pre-prepared customer data inventories.

Assign Roles:

Designate a facilitator (can be the CEO or another leader) and a scribe to capture notes during the session.

Set Expectations:

Communicate that each functional head must submit their customer data inventory at least 3 days before the session. Provide the checklist on right to guide their preparation.

Define Executive Goals:

Identify 2-3 high-level goals (e.g., increase customer retention by 10%, reduce churn, improve operational efficiency) to focus the discussion on actionable insights.

Action items for Functional Heads

Each functional head is responsible for preparing a customer data inventory for their domain.

Use the checklist below to ensure completeness.

Submit the inventory to the session organizer at least 3 days before the sprint.

Checklist for Functional Heads: Customer Data Inventory

1

Identify Data Sources:

List all systems, tools, or repositories where customer data resides (e.g., CRM, analytics platforms, support tools).

2

Specify Data Components:

For each source, note the main customer data points (e.g., customer ID, demographics, behaviors, transactions, interactions).

3

Classify Data Type:

Indicate whether each data point is structured (e.g., numerical, categorical) or unstructured (e.g., text, comments).

4

Map to Customer Touchpoints:

Describe how the data relates to customer interactions with your function (e.g., marketing campaigns, sales calls, support tickets).

5

Prepare a Brief Summary:

Create a 1-2 sentence overview of your data inventory for presentation during the sprint. (2-minute limit per function)

Example Inventories by Function

Below are suggestive examples to guide your inventory preparation.
Adapt these to your organization's specific tools and processes.

Function	Example Data Sources	Data Components	Data Type	Touchpoints
Marketing	CRM, Google Analytics, Mailchimp, Campaign	Customer ID, email open rates, website visits, download	Structured or Unstructured	Lead generation, campaigns, website
Sales	CRM, Pipedrive, contract management	Deal size, purchase history, contact details, conversion rates	Structured or Unstructured	Sales calls, contract signing, progression history
Customer Success	Zendesk, NPS surveys, churn reports, onboarding ramp	Ticket resolution time, NPS score, feedback	Structured or Unstructured	Support interactions, renewals, expansions
Product	Mixpanel, Amplitude, user feedback forms	Feature usage, session duration, comments	Structured or Unstructured	Product usage, feature adoption, feature requests
Finance	QuickBooks, billing systems, revenue reports	Invoice amounts, payment status, disputes	Structured or Unstructured	Billing, payment processing, unit economics
Operations	NetSuite, shipping logs, inventory systems	Order status, delivery times, complaints	Structured or Unstructured	Order fulfillment, delivery
Legal	Contract systems, compliance logs	Contract terms, consent forms, GDPR status	Structured or Unstructured	Contracts, data privacy compliance

Actions during 55-min sprint meeting

Facilitator Responsibilities Set the stage (3-mins)

- Welcome participants and restate the objective.
- Outline the agenda: mapping (20 min), insights discussion (25 min), action planning (10 min).
- Introduce the scribe and confirm the key person for weekly updates (to be finalized later).

Guide the Session: Keep discussions on track, ensure equitable participation, and manage time.

Use the Whiteboard: Draw a left-to-right customer journey map, adding touchpoints as functional heads present their inventories.



Customer Journey Mapping (20-mins)

Functional Head Presentations: Each head presents their customer data inventory (2 mins each, ~14 mins total).

- Focus on key data sources, data components, and touchpoints.
- Scribe captures details; facilitator adds touchpoints to the whiteboard map.

Map Recursive Flows: Discuss and mark any recursive customer interactions (e.g., repeat purchases, support follow-ups) on the map (~6 mins).

Present your 2-minute data inventory summary clearly and concisely, highlight how your data connects to customer touchpoints, be prepared to answer brief clarifying questions from other functions.

Observations & Insights discussion (25-mins)

Identify Cross-Functional Connections: Facilitator prompts discussion on where data from one function relates to others (e.g., marketing's lead data feeding sales pipelines, customer success feedback informing product updates).

Brainstorm Insights: Discuss potential insights from combining data sources that align with executive goals (e.g., linking churn data with product usage to reduce attrition).

Prioritize Opportunities: Begin identifying three areas where insights could drive operational or customer experience improvements.



Share observations on how your data intersects with other functions., suggest 1-2 potential insights based on your data and executive goals., actively participate in brainstorming, building on others' ideas.

Action planning & Close (7-mins)

Affirm Audit Sources: Confirm the data sources presented and note any access details (e.g., system logins, data export processes).

Finalize Insight Workflows: Agree on three priority insight workflows for the next 90 days, assigning an owner to each.

Designate Key Person: Appoint one person (e.g., a data analyst, operations lead, or functional head) to provide weekly updates on progress and insight deliverables.

Close: Summarize next steps and thank participants.



Next 90-days



The key person owns:

Weekly updates to share progress on **each of the three insight workflows** via email or a shared dashboard covering these items:

✓
Status of data collection and analysis

✓
Emerging insights and challenges

✓
Next steps and resource needs

Coordinate with workflow owners ensuring each owner **has the data and support needed** to execute their workflow.

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At the end of 90 days, produce the summary of outcomes (*such as insights generated, operational improvements made, customer experience enhancements*) with business impact(s).

The functional head owns:

Support Data Access: Provide necessary data exports or system access to workflow owners.

Contribute to Workflows: If assigned as a workflow owner, lead the analysis and implementation of your workflow, collaborating with other functions as needed.

Engage with Updates: Review weekly updates from the key person and provide feedback or resources as requested.

Key Deliverables

Customer Data Inventory:

A comprehensive list of customer data sources, data components, and data types across functions.

Customer Journey Map:

A visual representation of customer touchpoints, highlighting recursive flows.

Insight Workflow Outcomes:

Three prioritized workflows delivering actionable insights for operational improvement and customer experience enhancement.

Change Progress Made:

Weekly updates documenting the journey toward these outcomes with business impact(s).

About the author



John Williams is a Winning by Design ambassador and revenue architect for recurring revenue business growth models and provides hands-on help for operational teams across industries in retail, healthcare, manufacturing, and software development verticals. Additionally leading in the Pavilion executive AI in GTM program, he drives adoption in executive teams and heads of functions.

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