

SCV Readiness Checklist

Have you got these covered?

If not, reach out for a tailored readiness assessment.



1. Customer Data Landscape

Yes No Not Sure

Do you know where all your customer data currently lives (CRM, Finance/ERP, marketing, service, spreadsheets)?			
Are there systems that don't talk to each other today?			
Is your customer data consistent and trustworthy across all platforms?			
Can you track a customer journey from first touch to purchase to support?			

2. Data Strategy & Ownership

Yes No Not Sure

Do you have a clear owner or team responsible for customer data strategy?			
Are marketing, sales, and service teams aligned on what data matters most?			
Have you defined what a "single customer view" means for your business?			
Do you have scalable infrastructure (cloud or hybrid) to support growth?			

3. Technology & Infrastructure

Yes No Not Sure

Is your current technology stack able to support real-time or near real-time data access?			
Are you reliant on custom-built integrations or manual data workarounds?			
Can you easily bring in new data sources (e.g. new tools, third-party platforms)?			
Do you have scalable infrastructure (cloud or hybrid) to support growth?			

4. Reporting & Decision Making

Yes No Not Sure

Do business users have easy access to self-serve dashboards?			
Are you able to generate consistent reports across departments?			
Can you personalize campaigns or service interactions based on real-time data?			
Are you using predictive analytics or AI for customer engagement?			

5. Delivery & Maintenance

Yes No Not Sure

Do you currently rely on internal teams or external consultants for data projects?			
How long does it take to implement changes to your data pipeline or reports?			
Is your business facing high costs or long timelines for bespoke data work?			
Are you concerned about resource availability for maintaining custom solutions?			

6. Vision & Value

Yes No Not Sure

Are you looking to reduce the cost and complexity of data projects?			
Do you need faster time to value from your tech investments?			
Is there pressure to deliver more personalized, data-driven experiences?			
Do you want to future-proof your data foundation without starting from scratch?			

7. Delivery & Maintenance

Yes No Not Sure

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Are you concerned about resource availability for maintaining custom solutions?			

Next Steps

If you answered "No" or "Not Sure" to more than a few of these, you're not alone —and you're not behind. You're ready for a better approach.

Book a 20–Minute SCV Readiness Call with 5Y.

We'll show you how to start small, scale fast, and deliver results in less than 30 days.

5ytechnology.com

