

Reverse ETL First-Workflow Planner

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this before you buy a reverse ETL tool or promise a broad activation program. The goal is to choose one workflow that can create visible business value quickly and survive contact with real operators.

STEP 1: LIST THE CANDIDATE WORKFLOWS

- Write down the 3 to 5 activation ideas already being discussed. Examples: PQA scoring in Salesforce, paid-media suppression audiences, churn-risk flags in CS, lifecycle segments in Braze, support-priority queues.
- For each one, name the destination system and the person who would use it every week.

STEP 2: SCORE EACH WORKFLOW FROM 1 TO 5

- Business impact: if this works, does a meaningful team behavior change this quarter?
- Workflow fit: does the output land in a tool and cadence people already use?
- Data trust: are the source records and joins good enough to expose operationally?
- Delivery effort: can the team ship a narrow version without a quarter of architecture work?
- Ownership: is there a named owner who will notice if the sync breaks or the field loses trust?

STEP 3: ELIMINATE THE FAKE PRIORITIES

- Remove anything that sounds broad but has no natural owner, such as customer 360 or activate everything.
- Remove anything that only creates another dashboard or view without changing a real workflow.

STEP 4: CHOOSE THE FIRST BET

- The best first workflow usually has one owner, one destination, one behavior change, and one metric you can check inside 30 days.

- If two options score similarly, choose the one with cleaner ownership and lower delivery complexity.

MEETING NOTES

- Candidate workflow:
- Destination system:
- Decision owner:
- Success metric after 30 days:
- Biggest trust risk:
- Next implementation step this week: