

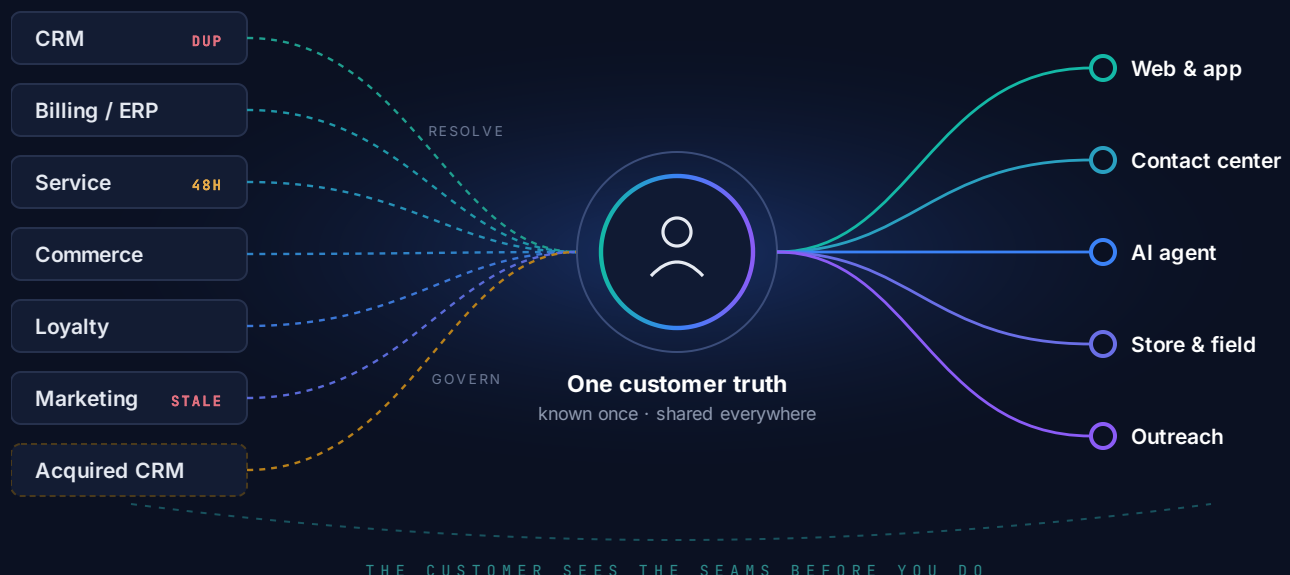
CUSTOMER EXPERIENCE DESIGN & INNOVATION

AI-Ready CX: Know Them Once. Serve Them Everywhere.

Your customer does business with one company. Your systems hold dozens of versions of them. This paper shows how to design the customer truth every person, journey and AI agent works from — starting with the moments customers feel, not the systems IT owns.

SEVEN SYSTEMS • SEVEN VERSIONS

EVERY MOMENT

**Skip Vanderburg**

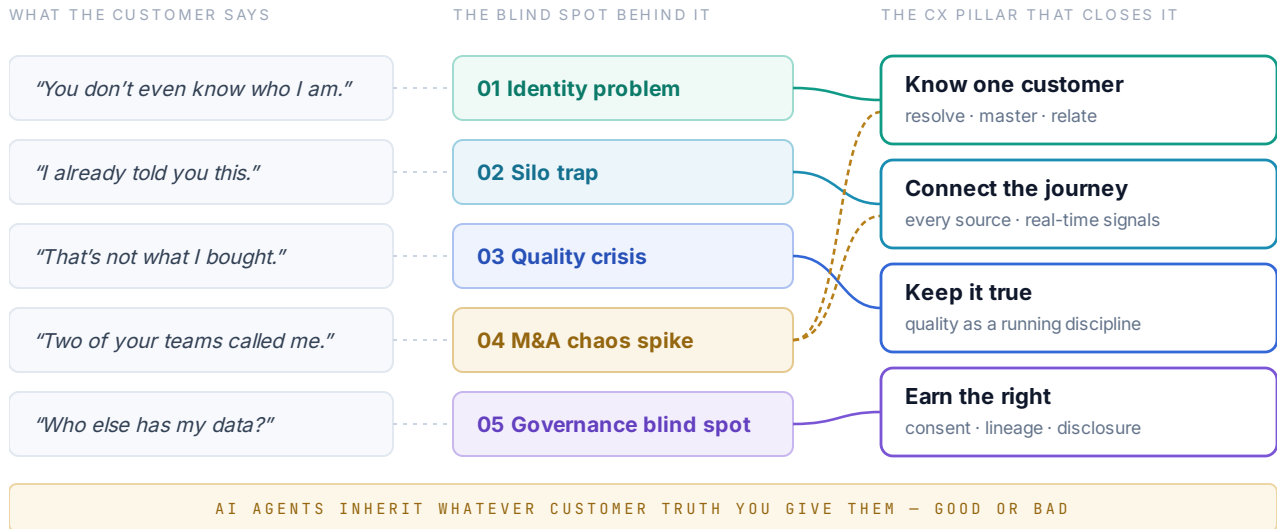
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The customer sees the seams first

Most CX programs have the strategy, the vision and the AI roadmap. What they lack is one customer truth the whole company shares. AI doesn't close that gap. It automates it — at the speed of every interaction.

FIGURE 1 • FROM WHAT THE CUSTOMER FEELS TO WHAT CLOSSES IT



Start from the sentence, not the system. Every blind spot in this paper reaches the customer as something they say out loud. If you can hear it in your call recordings, it is already costing you loyalty.

How to use this paper

Pick one journey, not the whole enterprise. Find where the customer feels the seams, trace each seam back to its blind spot, and close it with the pillar that owns it — before an AI agent is allowed to act in that moment. One ordinary customer, Dana, carries every idea from here.

What it deliberately skips

Vendor selection, platform architecture and MDM tooling. Those choices matter, and they are not the constraint. This is a CX paper: it decides what the customer truth must do, then hands IT a clear brief. It also takes a position on where to start that differs from the platform-led view (page 05).

7 in 10

customers abandon a brand after two poor experiences

EMPLIFI, 2025

47%

of CX experts say data integration is the top barrier to CX value

INFORMATICA, 2026

74%

of customers are frustrated by repeating themselves

ZENDESK, 2026

72%

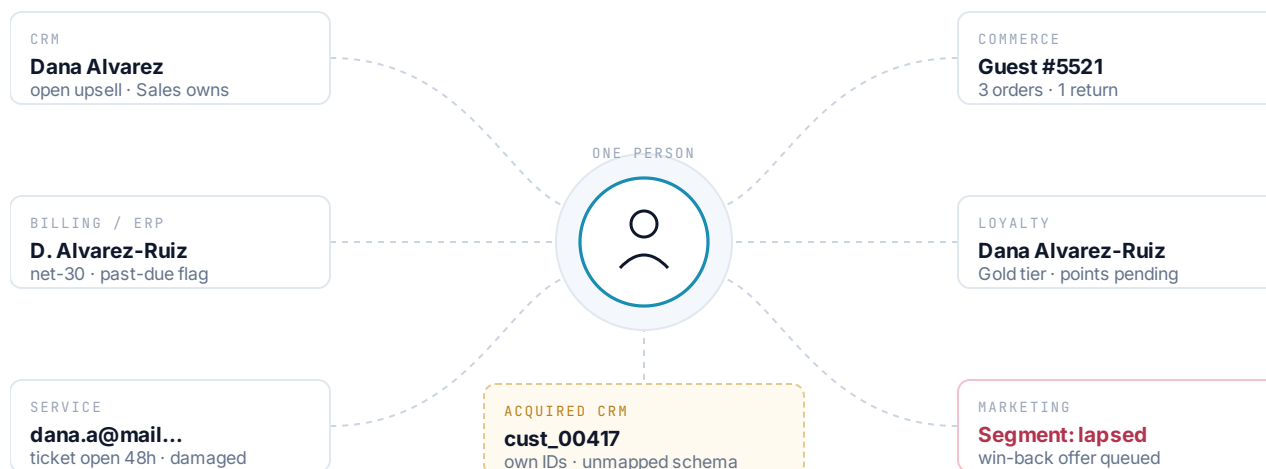
of service teams name data readiness a major blocker

SALESFORCE, 2026

One customer. Dozens of versions of her.

Most enterprises hold customer data in 50 to 200 systems, most of which have never spoken to each other. Each holds a version of the customer. None holds the whole picture — and the customer is the only one who sees all of them at once.

FIGURE 2 • WHAT EACH SYSTEM BELIEVES ABOUT THE SAME CUSTOMER



Seven systems, seven customers. Loyalty thinks Dana is Gold. Marketing thinks she has lapsed. Service knows she is waiting on a damaged item — and nobody else does.

FIGURE 3 • HOW IT SHOWS UP — IN THE CUSTOMER'S WORDS

TEAM	WHAT IT DOESN'T KNOW	WHAT THE CUSTOMER HEARS
Sales	There is an open service ticket	"You're pitching me an upgrade while my problem is still open."
Service	A renewal is being negotiated	"Your agent had no idea I'm one of your biggest accounts."
Marketing	She is an active, high-value customer	"Why am I getting a 'we miss you' discount?"
AI agent	The data it uses hasn't been reconciled since the last acquisition	"It recommended the exact product I'm returning."

THE INVISIBLE COST

Every interaction carries the cost of an organization that hasn't learned to act as one. It never shows up on a single report. It shows up in churn.

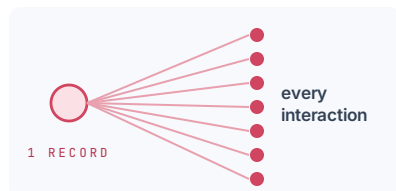
A QUESTION FOR YOUR NEXT LEADERSHIP MEETING

How many definitions of "customer" are in use across your business? One enterprise leader counted more than forty.

Three forces, and the clock is running

Customer-centricity has been a priority for a decade. What changed is the cost of not knowing the customer. Three forces turned a back-office inconvenience into a front-line liability — and each one lands on the customer first.

FIGURE 4 • THREE FORCES THAT WON'T WAIT

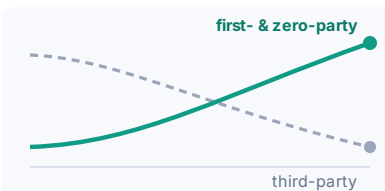


01 • AI SCALES WHAT IT'S GIVEN

Bad data becomes bad decisions — automated

Agents, copilots and recommendation engines run on customer data. Feed them fragments and they don't underperform quietly. They make the wrong call in every interaction they touch.

The customer feels: confident, fast, wrong answers.

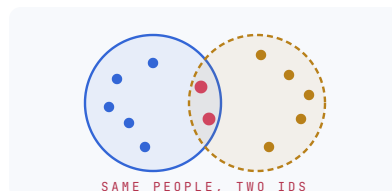


02 • FIRST-PARTY DATA IS THE FUEL

What customers share is now what you run on

Third-party data is fading. What customers give you directly now drives personalization and AI — but only if it's unified. Scattered across dozens of systems, it's a liability dressed as an asset.

The customer feels: "I told you my preferences. Why ignore them?"



03 • M&A MULTIPLIES THE CUSTOMER

Every deal doubles the versions of each customer

Acquisitions bring new systems, new IDs and schemas that map to nothing you own. How fast the combined company knows each customer decides whether cross-sell lands in weeks or years.

The customer feels: two account teams, two pitches, no memory.

DEFINITION • ONE VIEW OF THE CUSTOMER, IN CX TERMS

One complete, accurate, continuously maintained record of each customer — reconciled across every system that touches them — that every employee, journey and AI agent can trust and act on at the same time.

It isn't a report or a dashboard. It's the shared memory of the relationship.

Companies ahead in CX didn't build better campaigns. They decided the customer record was a product, not a report.

That decision belongs to CX and IT together. And the window to make it is narrowing.

67–73%

of AI inputs come from first-party customer data

INFORMATICA, 2026

42%

of CX professionals say data and analytics will most change their roles

INFORMATICA, 2026

81%

of customers expect the conversation to continue, not restart

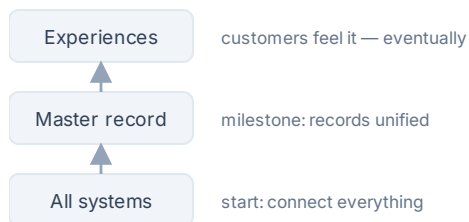
ZENDESK, 2026

Same problem. A different starting point.

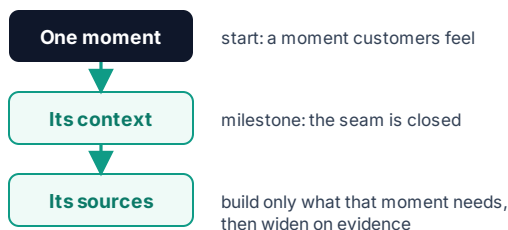
Enterprise data platforms have made a strong case that AI-ready CX rests on a unified customer data foundation. We agree on the problem. We part ways on where to start, who leads, and how you know it's working.

TWO DIRECTIONS THROUGH THE SAME STACK

PLATFORM-LED · BUILD UP, HOPE IT'S FELT



CX-LED · f/cx.ai · DESIGN DOWN, BUILD WHAT'S NEEDED



WHERE THE TWO VIEWS DIFFER

QUESTION	PLATFORM-LED DATA FOUNDATION	CX-LED CUSTOMER TRUTH — OUR VIEW
Who leads	IT and data leaders, as architects	CX and IT together — CX defines, IT builds
First deliverable	An integration and mastering architecture	A seam map of one journey, in the customer's words
Unit of progress	Systems connected, records mastered	Moments made ready , one at a time
When AI may act	When the data foundation is trusted	When a moment passes five checks
Governance	Compliance and control	Trust as a feature customers notice
Proof	Data quality and platform metrics	Six signals customers can feel
Technology	A specific platform stack	Vendor-neutral — a brief any stack can build to

Both views are needed; the order is the argument. A strong data foundation is necessary, not sufficient. Started from the wrong end, it becomes a program customers never feel.

WHAT WE KEEP

The diagnosis

Identity, silos, quality, merger debt and lineage are real — and AI makes each worse.

WHAT WE ADD

The customer's side

Each blind spot traced to what customers say and a signal that proves the fix.

WHERE WE'RE NICHE

Design before build

We design the moments and write the brief. Any platform team builds to it.

One customer, three records, one bad week

Dana bought online, called support and joined the loyalty program. To the company, she is three records in five systems. To Dana, she is one person having a bad week.

FIGURE 5 • THE SEAM MAP — ARTIFACT 01 • ONE WEEK, AS DANA LIVED IT



Map the seams, not the systems. Dana never saw a data problem — she saw a company that didn't know her, five days running. No seam was one team's fault, so no team fixed them. An AI agent on this data repeats all five, faster.

FIGURE 6 • EACH SEAM, TRACED TO ITS CAUSE

#	WHAT DANA HIT	WHY IT HAPPENED	BLIND SPOT
03	Agent can't find her order	Guest checkout email doesn't match her service record	01 IDENTITY
04	Gold, but points missing	Loyalty never received the order event	02 SILO
05	Win-back offer to an active buyer	Segment built on a stale, unreconciled profile	03 QUALITY
06	AI suggests the returned item	Assistant grounded on purchases, blind to the open ticket	02 SILO 03 QUALITY
07	Second call starts from zero	No shared history across channels or agents	01 IDENTITY 02 SILO

Five blind spots, as the customer feels them

One view of the customer isn't hard to imagine. It's hard to build, for predictable reasons. Each blind spot starts inside the company, reaches the customer as a broken moment — and gets worse the moment AI acts on it.

FIGURE 7 • CAUSE INSIDE, SYMPTOM OUTSIDE, AMPLIFIED BY AI

BLIND SPOT	WHAT BREAKS INSIDE	WHAT THE CUSTOMER FEELS	WHAT AI DOES WITH IT
01 Identity	Records can't be matched to one person	"You don't know who I am."	Draws conflicting conclusions about the same customer
02 Silos	Each team holds a partial, unshared view	"I already told you this."	Answers from one system, blind to the rest
03 Quality	Data is unified but factually wrong	"That's not what I bought."	Automates the error across every interaction
04 M&A	Foreign IDs and schemas arrive all at once	"Two of your teams called me."	Treats one customer as two, or misses them entirely
05 Governance	No lineage; consent doesn't travel	"Who else has my data?"	Uses data it has no right to use

BLIND SPOT 01

The identity problem: you can't serve who you can't recognize

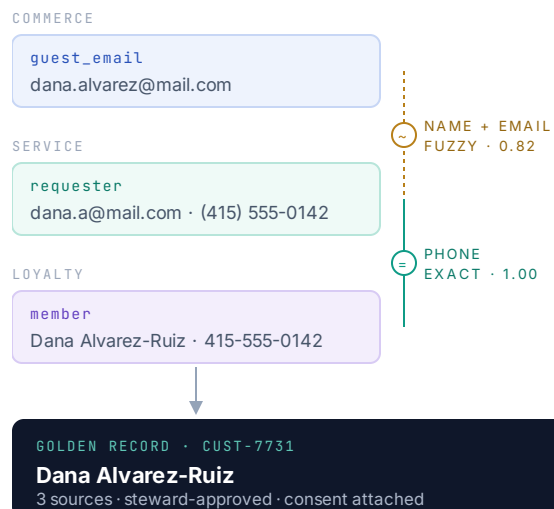
Before you can unify a customer, you have to know which records are the same person. Dana is three records with slightly different names, emails and phone numbers.

Without identity resolution — matching and merging records with exact and probabilistic rules — your "single view" is just the latest duplicate. Sales calls the wrong contact. Marketing sends the offer twice. **AI agents reach different conclusions about the same person.**

WHERE IT BITES HARDEST

A financial services firm holds one client under three names across CRM, billing and risk. Three teams work three accounts — and the client feels all three.

FIGURE 8 • THREE RECORDS, ONE PERSON

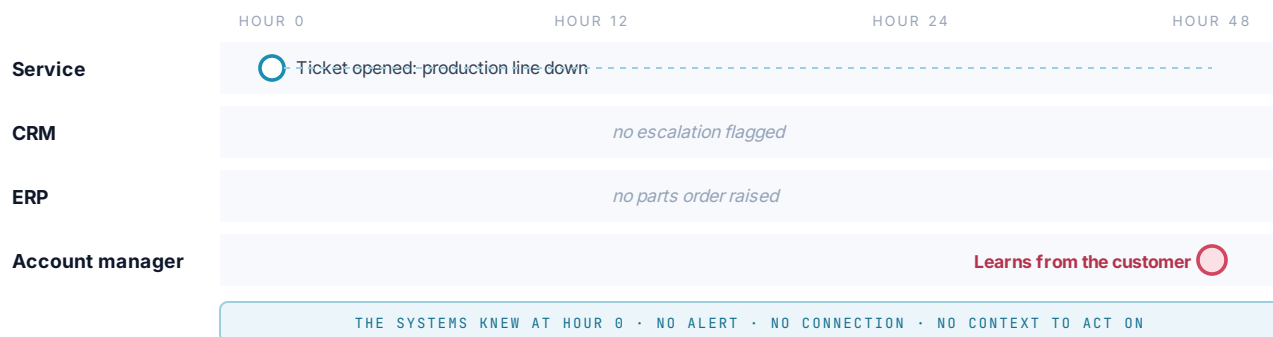


The weakest match sets the reliability. Settle the fuzzy link — or send it to a person — before any agent acts on it.

The silo trap: every team has a piece, nobody has the customer

Even accurate records rarely move between systems. CRM holds purchases, ERP holds billing and entitlements, marketing holds behavior, service holds tickets. Sales doesn't see the open ticket. Service doesn't see the pending upsell. **The customer ends up being the integration layer** — carrying context from team to team by repeating themselves.

FIGURE 9 • FORTY-EIGHT HOURS NOBODY CONNECTED



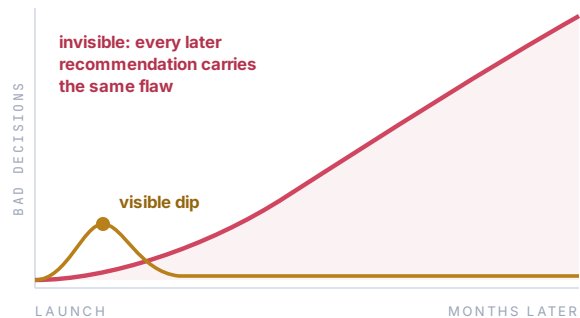
A manufacturer's account manager heard it from the customer. The signal existed two days earlier, one system over. Silos turn proactive moments into apologies.

The quality crisis: unified but wrong is worse than scattered

Wrong addresses waste outreach. Old contacts route calls to people who left. Bad account hierarchies give enterprise clients the wrong risk profile. When AI is grounded in that data, it doesn't produce a bad insight — **it automates a bad decision**, again and again.

Customer data changes constantly: people move, companies restructure, products retire. Quality is a running discipline, not a one-time cleanse. Without monitoring built into the flow, decay is invisible until something breaks in front of a customer.

FIGURE 10 • THE DAMAGE YOU SEE, AND THE DAMAGE YOU DON'T



A retailer trained personalization on 18 months of purchases where **30%** of records had in-store and online swapped. In-store shoppers got digital offers — and kept getting them.

AT THE DOOR

Validate on entry

Address, email and channel rules run where data is captured — not in a quarterly cleanse.

IN THE FLOW

Monitor continuously

Hold anything outside its threshold before it reaches the customer record.

AT THE SOURCE

Fix it where it broke

Every correction goes back to the system that created the error, or it comes back next week.

The M&A chaos spike: the customer feels the merger first

An acquisition doesn't just add customers. It adds a foreign CRM, foreign IDs and foreign data standards — years of accumulation arriving at once, ungoverned. The first casualty is the relationship: duplicate outreach from two account teams, high-value customers invisible to the combined sales force, territory disputes at exactly the moment the business should be focused on retention.

FIGURE 11 • TWO WAYS TO ABSORB 400,000 CUSTOMERS — A BANK ACQUISITION

DEAL CLOSES

Systems-first

duplicate outreach begins

territory disputes

"complete" at 18 months — still a patchwork

Customer-first

days

combined view

cross-sell in first quarter

overlaps resolved in days · one hierarchy in weeks

WHAT THE CUSTOMER EXPERIENCES

Two pitches from two teams. A wealth advisor who doesn't know them. Attrition accelerates, and the synergies arrive late — if at all.

WHAT THE CUSTOMER EXPERIENCES

Continuity. One relationship team that knows them, one welcome, and relevant offers in the first quarter. Relationships hold.

The governance blind spot: trust is a CX feature

Customer data is among the most regulated data you hold. Consent, residency, access and the right to be forgotten aren't just legal matters — they decide whether a customer trusts you with more.

Without lineage you can't answer basic questions: where does this customer's data live, who touched it, and does our use match their consent? **Regulators ask these questions. Customers now ask them too — and AI agents must be able to answer them.**

THE FIRST POST-CLOSE PRIORITY

Treat the acquired customer base as a journey to design — the acquisition onboarding plan, artifact 06 — not an integration backlog item. The welcome is the first moment the new customer judges the deal.

FIGURE 12 • ONE ACCESS REQUEST, TWO ANSWERS

11 PLACES ONE POLICYHOLDER'S DATA LIVED



6 REGIONAL

2 LEGACY

3 PARTNERS

vendor contract expired 2 years ago

Manual search

11 days — ends as a regulatory disclosure

Mapped lineage

hours — a routine, confident reply

An insurer in fourteen jurisdictions. **The lineage always existed. Nobody had mapped it.**

TEST IT WITH A REAL REQUEST

Take last quarter's access or deletion request. Can you show where every copy lived, and prove the answer, the same day? If not, no agent should touch that data yet.

Start with the moment, not the master record

Platform-led programs start with systems and hope the experience improves. CX-led programs start with the moments that matter and work backward to the data each one needs. That order decides whether customers feel the first release.

FIGURE 13 · FIVE QUESTIONS, ASKED IN THIS ORDER, FOR EVERY MOMENT



A “NO” AT STEP 04 MEANS A PERSON HANDLES THE MOMENT UNTIL IT’S FIXED

FIGURE 14 · THE CONTEXT CONTRACT — ARTIFACT 03, ONE ROW PER MOMENT

MOMENT	CONTEXT IT NEEDS	SOURCE OF TRUTH	FRESH WITHIN	IF IT’S MISSING
Damaged-item call	Order, delivery status, open tickets, tier	Commerce · service	real time	Agent asks once, never twice; flags the gap
AI chat: “Where’s my order?”	Order, carrier events, returns in progress	Commerce	minutes	AI hands over with context — no guessing
Next-best offer	Purchases, returns, open issues, consent	Customer record	daily	No offer. Silence beats a wrong one
Renewal conversation	Contract, usage, service history, owner	ERP · CRM	daily	Account owner joins before the call
Post-merger welcome	Both relationships, matched, one owner	Customer record	before send	Hold outreach until overlap is resolved

Why work backward

A complete customer record is a multi-year program. A moment is a quarter. Starting from moments puts value in front of customers while the foundation grows — and it shows which data matters, so nobody cleans fields no journey uses.

The contract is the brief IT builds to. It turns “we need a customer 360” into a finite list of fields, owners and freshness rules, each tied to a moment customers feel.

WATCH, DON’T SURVEY

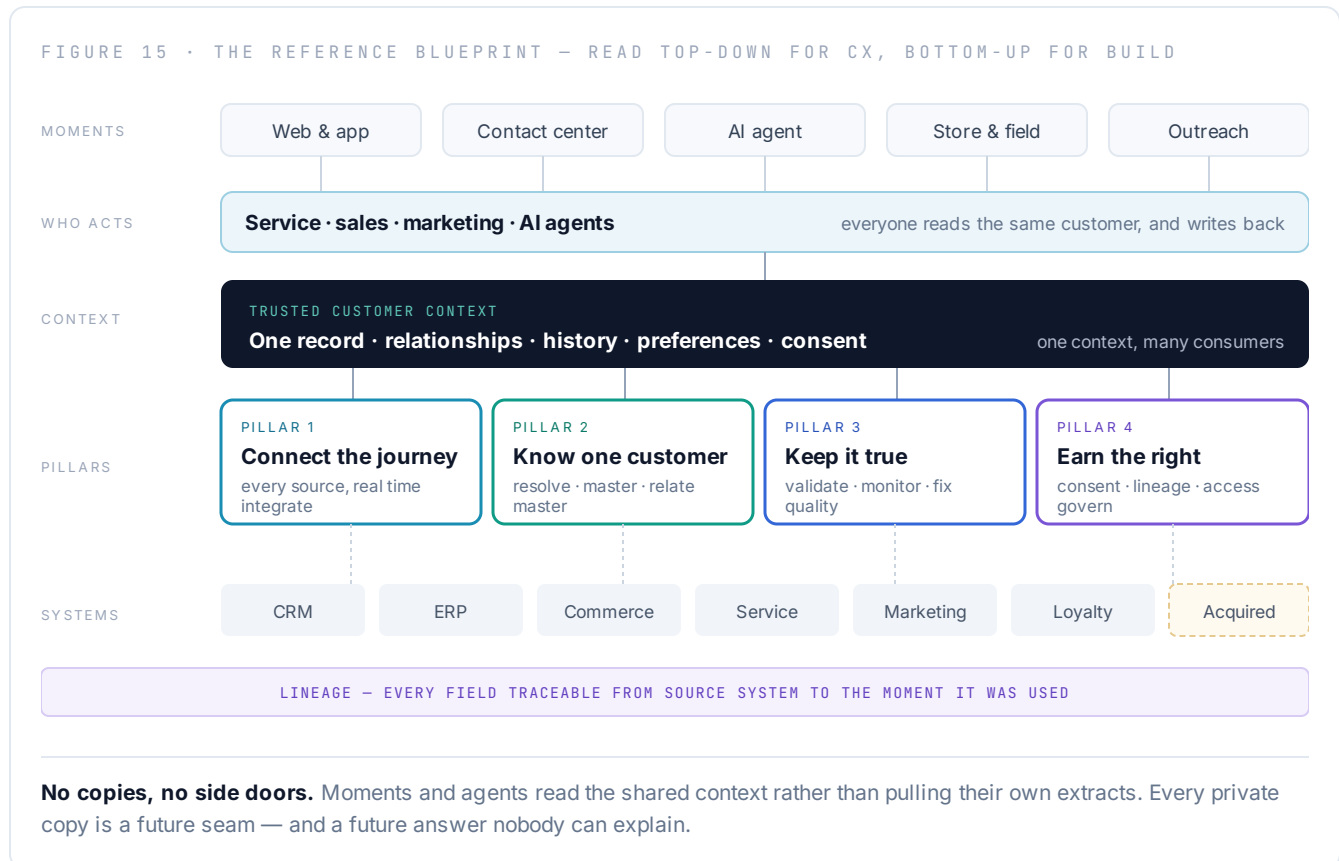
Sit with frontline teams and record where they switch screens to answer one question. Every switch is a seam, and every seam is a row in the contract.

THE RULE THAT PROTECTS THE CUSTOMER

If the context isn’t ready, the moment goes to a person. AI earns each moment by passing the gate — never by default.

Four pillars, one customer truth

The data industry calls these pillars integrate, master, cleanse and govern. We keep the pillars and change who they answer to: each is defined by what the customer notices when it works, and each feeds one shared context that people and AI agents read from.



PILLAR 1

You already knew

The account team calls before the customer has to.

PILLAR 2

One of me

One name, one history, one conversation across channels.

PILLAR 3

It's right

Offers and answers that match what they actually did.

PILLAR 4

I trust you

Their choices are honored everywhere, and you can prove it.

Who owns the customer truth

Not IT alone, and not CX alone. CX owns what the truth must do — the moments, the context contract, the definition of a customer. IT owns how it's built and run. A named executive signs both, because a customer record with two half-owners has none.

THE QUESTION THAT EXPOSES A MISSING PILLAR

"When an AI agent answers a customer, which record did it use, and who could prove it was right?" If the answer names a system rather than the shared context, a pillar is missing.

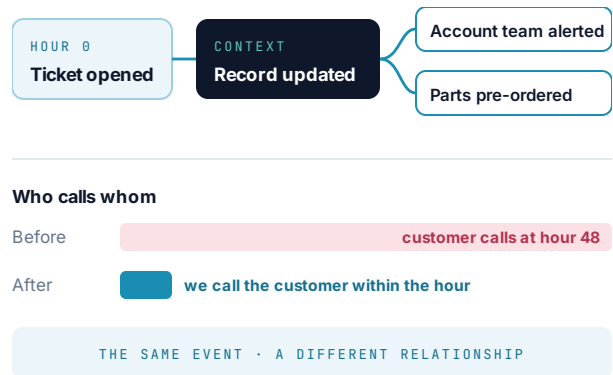
Bring every signal to the moment it matters

The customer has touched sales, service, commerce, marketing and partners. Connecting them isn't about pipes — it's about making sure the signal reaches the person or agent who can act on it, while it still matters.

What “connected” has to mean

- **Every source, no custom glue.** CRM, ERP, commerce, service, marketing and acquired systems join through maintained connectors — not scripts that break when a vendor updates.
- **Real-time where the moment needs it.** Clicks, orders and service events move at the speed of the context contract, not a nightly batch.
- **Anomalies stopped upstream.** Mapping errors get caught before they reach the customer record, not after a customer complains.

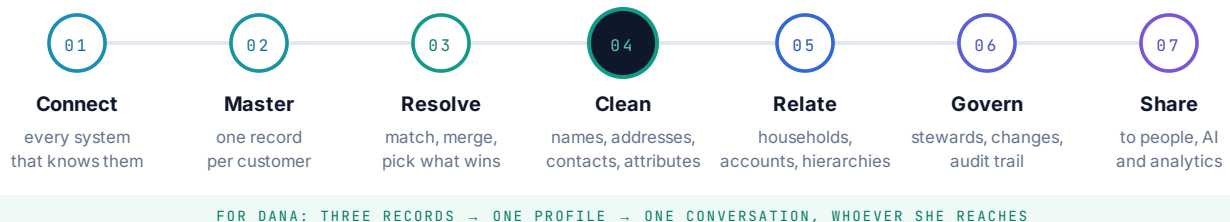
FIGURE 16 • THE SAME SIGNAL, CONNECTED



One customer, one truth — built in seven moves

Connecting brings the data together. Mastering it creates the version the whole business trusts. It anchors personalization, keeps service consistent, survives migrations and acquisitions, and **makes consent attach to the person — not to whichever system collected it.**

FIGURE 17 • SEVEN MOVES FROM SCATTERED RECORDS TO A SHARED CUSTOMER



IT IS NOT

A data lake dump

Landing everything in one place without meaning moves the silo; it doesn't remove it.

IT IS NOT

A nightly batch

If the moment is real time, yesterday's data is a wrong answer delivered confidently.

IT IS NOT

A new silo named “360”

A profile only one team can read is just a better-looking silo.

Write down what a customer is — then sign it

Forty definitions of “customer” is not a data problem. It’s a decision nobody made. The customer definition card makes it once, in plain language, and becomes the rule every system, team and AI agent follows.

FIGURE 18 • THE CUSTOMER DEFINITION CARD — ARTIFACT 02

VERSION 1.0 • REVIEWED MONTHLY
OWNER: VP, CUSTOMER EXPERIENCE

What counts as one customer

DEFINITION — ONE SENTENCE

One person or organization we serve, recognized the same way in every system, moment and agent — whichever door they came in through.

MERGE WHEN

- A verified phone or customer ID matches exactly
- Name and email match strongly, plus one exact key
- Acquired IDs are mapped before first contact
- B2B: the legal entity, not the billing account

NEVER MERGE WHEN

- Only the name matches
- An email is shared across a household
- The customer disputes the link
- Confidence is below threshold — a steward decides

WHICH SYSTEM WINS, BY FIELD

Legal name	Billing — verified at contract
Contact choices	Preference center — what she said
Address	Latest verified delivery
Tier & points	Loyalty
Open issues	Service — always shown first

ACCOUNTABILITY

Owner	A named executive, not a committee
Stewards	Clear the “maybe” queue daily
Undo	Any merge can be split and replayed
Change log	Every rule change, dated and reasoned
Used by	Every system, team and AI agent

Every line is enforceable somewhere other than a slide. Read each rule and name the system that applies it. Rules with no system behind them are hopes, not definitions.

Three questions that finish the card

- 01 Who signs it?** Without a named owner, the definition drifts back to forty.
- 02 What is never merged?** A wrong merge is worse than a duplicate — it shows one customer another’s history.
- 03 How does a merge get undone?** Customers will dispute links. The fix must take minutes, not a ticket queue.

WRITE IT IN A ROOM, NOT A BACKLOG

CX, service, marketing, IT, legal and privacy agree it together in one working session. The output is a published document, not a configuration file.

THE FAILURE THIS PREVENTS

Two people share a household email. An agent merges them, then tells one about the other’s order. Every step was “correct.”

Measure quality where the customer feels it

A golden record is only as good as what flows into it. Quality scores mean little to a CX leader — until each one is tied to the moment it breaks. Then they become the cheapest early warning you have.

FIGURE 19 • QUALITY, TRANSLATED INTO CUSTOMER MOMENTS

QUALITY MEASURE	WHERE THE CUSTOMER FEELS IT	HEALTHY BAND	OWNER OF THE FIX
Duplicate rate	Two teams, two offers, one confused customer	< 1%	Stewards, daily
Channel attribution	Digital offers sent to in-store shoppers	> 98% correct	Commerce and store systems
Order-status freshness	An agent — human or AI — gives the wrong answer	minutes	Commerce integration
Contact validity	Bounced messages, calls to people who left	> 95% valid	Capture points, at entry
Hierarchy accuracy	An enterprise client gets the wrong risk or service tier	reviewed quarterly	Account owners

Bands are illustrative — set yours from your own baseline. The point is the second column: every quality measure has a customer on the other end of it.

FIGURE 20 • THE CONTEXT READINESS GATE — ARTIFACT 04, FIVE CHECKS, ALL MUST PASS



For Dana's damaged-item moment today:

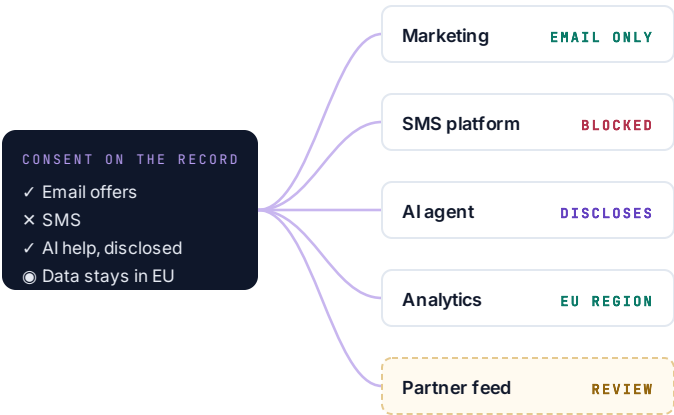
01 FAIL — FUZZY LINK 02 PASS 03 FAIL — NIGHTLY BATCH 04 PASS 05 PARTIAL → a person, for now

These are gates, not a score. Four out of five isn't 80% ready — it's one unguarded path to a confident wrong answer. Publish the result, including the fails.

Personalization is borrowed trust. Pay it back.

Every personalized moment spends a little of the customer’s trust. Governance is how you earn it back: consent honored in every system, a clear answer to “why did you do that?”, and proof on demand. Handled well, it’s a CX feature customers notice.

FIGURE 21 • CONSENT TRAVELS WITH THE CUSTOMER



Consent belongs to the person, not the system that collected it. Mastered once, it’s enforced everywhere at the same moment.

What governance means to a customer

- **You know what you hold.** Sensitive data is found and classified automatically, not by memory.
- **You can show the path.** Lineage runs from source to record to the moment it was used.
- **You honor the choice.** Access, residency and consent rules are enforced, not documented.
- **You answer fast.** Access and deletion requests take hours, not weeks.

95%

of customers expect an explanation for an AI-made decision
ZENDESK, 2026

~75%

want to know when they’re dealing with an AI agent
SALESFORCE, 2024

54%

would trust an AI agent with simple issues only
INTERCOM, 2026

FIGURE 22 • THE CONSENT & DISCLOSURE REGISTER – ARTIFACT 05, ONE ROW PER USE

USE OF CUSTOMER DATA	PERMITTED BY	WHAT THE CUSTOMER IS TOLD	HOW THEY UNDO IT
AI agent answers service questions	Service relationship	“You’re chatting with our AI assistant”	“Talk to a person” — one step, always
Personalized offers	Opt-in, by channel	Why this offer, in one line	Preference center, honored everywhere
Acquired-customer outreach	Consent carried from source	Who we are now, and what changed	Opt out before any offer is sent

From reacting to what they did, to knowing what they need

The pillars are a technical achievement. Their value shows up in moments. The real shift is from reactive personalization — responding to the last click — to contextual: knowing who the customer is, what they value and what they need before they ask.

FIGURE 23 • THREE LEVELS OF PERSONALIZATION, AS DANA WOULD EXPERIENCE THEM

LEVEL 1 • REACTIVE

Responds to the last click

"Customers who bought this also bought..." — the return

LEVEL 2 • CONSISTENT

Same answer everywhere

Every channel sees the open ticket, her tier and her preferences. Nobody asks twice, and no offer contradicts the conversation she's having.

LEVEL 3 • CONTEXTUAL

Knows before she asks

The replacement ships before she calls. Points are credited with an apology. The AI assistant opens with "Your replacement arrives Thursday" — and offers nothing until the problem is closed.

REQUIRES ALL FOUR PILLARS

Most companies are stuck at level one with level-three ambitions. AI doesn't skip a level. It amplifies whichever one your customer truth supports.

FOR AI

AI that works because the context works

Agents grounded in one profile resolve without escalating. Churn models built on complete histories spot risk before customers leave.

FOR EVERY TEAM

Personalization without adding headcount

A service rep sees the full relationship in real time. A marketer trusts the segment. Routine requests close end to end.

FOR ACQUISITIONS

Deal value that arrives on schedule

How fast you know the combined customer base is how fast the deal pays off. The two move in lockstep.

FOR OPERATIONS

Savings that compound

No more manual reconciling, pre-campaign cleansing or brittle point-to-point fixes. Fragmentation costs more every quarter you wait.

SPOTLIGHT • A VENDOR ON ITSELF

When Salesforce unified its own customer data

Account and product data across several internal orgs, rebuilt as mastered records shared to analytics and AI. Vendor-reported; read accordingly.

98%
fewer tax
adjustments

20%
fewer duplicate
accounts

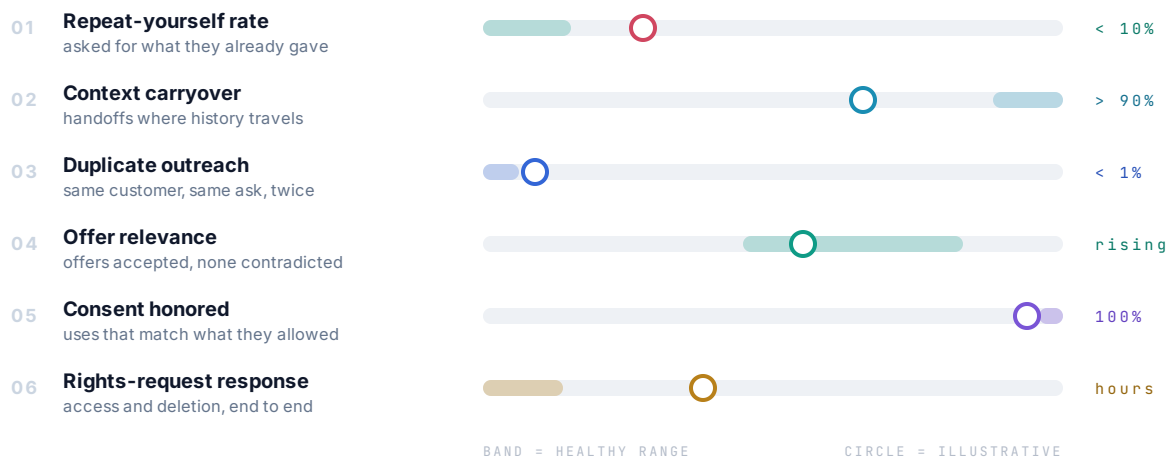
85%
of accounts
enriched

100%
less manual
governance effort

Six experience signals on one page

Customer data programs usually report on themselves: records mastered, sources connected, quality scores. Those matter to the build team. Leadership should read what the customer feels — and every number below is visible from outside the company.

FIGURE 24 • THE EXPERIENCE SIGNAL SCORECARD — ARTIFACT 07



Read them together, never alone. Carryover can look healthy while repeat-yourself rises — a sign history travels to people but not to the AI agent. The gaps between signals are where the next seam is.

What each one tells you

- **Repeat-yourself** measures identity and silos. It's the seam customers complain about most.
- **Carryover** measures whether context reaches people *and* agents.
- **Duplicate outreach** is the M&A and marketing health check.
- **Relevance** measures quality: right data, right offer.
- **Consent** and **rights response** measure trust you can prove.

ONE MEASURE TO STOP REPORTING UPWARD

"Percent of records unified." It measures the program, not the customer. A 95%-unified record set can still fail Dana five times a week.

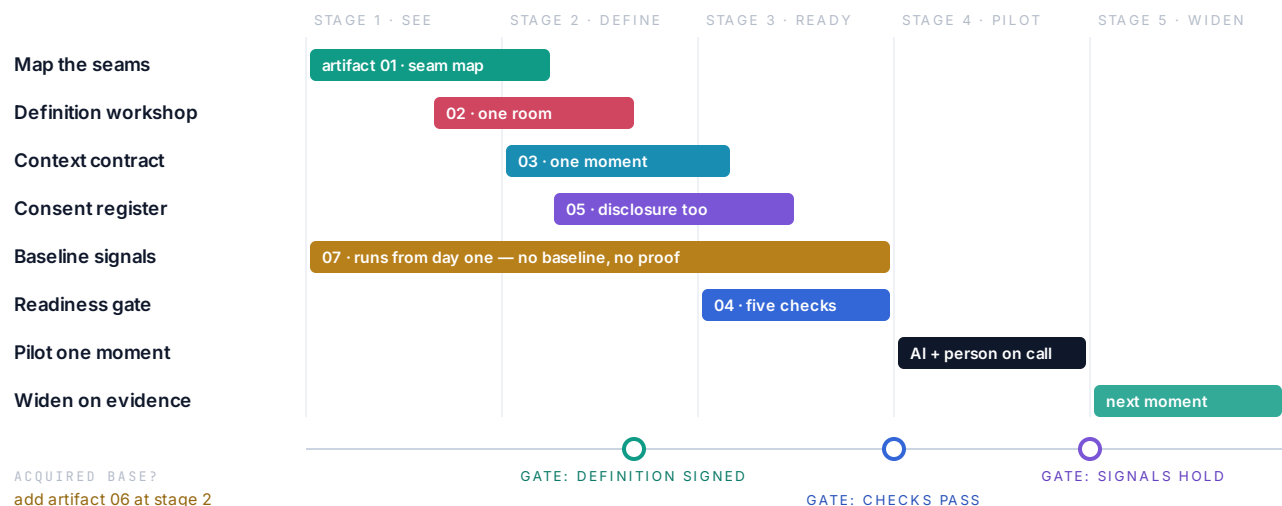
CAPTURE THE BASELINE FIRST

Measure all six before anything changes. Without a before, every after is an anecdote.

One moment first, in this order

None of this starts with a platform decision. It starts with one journey, one signed definition and one moment made ready — then widens on evidence. Pace depends on your estate; the order doesn't.

FIGURE 25 • THE SEQUENCE — SEVEN ARTIFACTS, THREE GATES, ONE MOMENT



Teams that start with the platform build a customer record nobody has defined. Teams that skip the seam map fix what's easy instead of what customers feel. The first two stages produce no software — and they decide the outcome.

What good looks like after the first moment

- One moment where customers feel the difference, and AI acts in it safely.
- A signed definition of a customer, with a named owner.
- A context contract IT can build to without a steering committee.
- Six signals, with a baseline, on one page.
- A published list of moments that aren't ready yet — and why.

Your role

The customer truth has always been a business priority. What changed is the cost of not having it: fragmented data now means fragmented AI, stalled acquisitions and exposure you can't see.

CX leaders define what the truth must do. IT leaders build what makes it real. Together, they decide whether the AI strategy lands with customers — or just with slide decks.

WHERE THIS GOES NEXT

Know them once. Serve them everywhere.

f/cx.ai is a customer experience design and innovation agency for the AI era. We design, prototype and prove the journeys, service models and AI agents enterprise organizations run on.

IF YOU HAVEN'T STARTED

Map the seams

Pick one journey and walk it as the customer. The seam map needs no engineering and sets every priority after it.

IF YOUR 360 HAS STALLED

Anchor it to a moment

Stalled programs rarely lack data. They lack a signed definition and one moment customers would notice.

IF AI IS ALREADY LIVE

Run the gate backward

Put every live AI moment through the five readiness checks. Any fail goes to a person until it's fixed.

An AI agent is only as good as the customer it thinks it's talking to. Get the customer right, and the AI gets easier.

THE SEVEN ARTIFACTS, IN ORDER

- | | | |
|--------------------------------|----------------------------------|--------------------------------|
| 01 Seam map | 02 Customer definition card | 03 Context contract |
| 04 Readiness gate report | 05 Consent & disclosure register | 06 Acquisition onboarding plan |
| 07 Experience signal scorecard | | |

THE CONVERSATION WE HAVE MOST OFTEN

Which customer moments are ready for AI, which aren't, and what has to be true before they are. If that's the question in front of your leadership team, it's the one we're set up for.

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Where the numbers and influences came from

This paper is f/cx.ai's independent point of view, written in conversation with the platform-led case for a unified customer data foundation. The CX-led approach, the worked customer, the seven artifacts, the readiness gate and the signal scorecard are our own. External figures are attributed on the page where they appear. Vendor-published data is self-interested and is labeled as such.

THE PERSPECTIVE THIS PAPER RESPONDS TO

Informatica 2026	<i>How IT Leaders Build the Data Foundation for AI-Ready CX</i> (eBook). A clear statement of the platform-led view. Its data blind spots, foundation pillars and several industry scenarios informed our thinking; we reframe them from the customer's side and diverge on where to start (page 05).
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CUSTOMER EXPECTATIONS AND LOYALTY

Emplifi 2025	<i>Emplifi reveals 70% of consumers will abandon a brand after just two negative experiences</i> (press release, April 2025).
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Zendesk 2026	<i>CX Trends</i> . 74% frustrated by repeating themselves; 81% expect continuity rather than restart; 95% expect an explanation for an AI-made decision.
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Salesforce 2024	<i>State of the AI Connected Customer</i> . About 75% want to know when they are dealing with an AI agent. 2024 baseline.
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Intercom 2026	<i>AI Sentiment Report</i> . 54% would trust an AI agent with simple issues only.
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DATA READINESS AND CX VALUE

Informatica cited 2026	<i>From Data Silos to AI-Enabled Customer Engagement</i> . 47% of CX experts name data integration the primary barrier to CX value; 42% say data and analytics will most affect their roles; first-party data drives 67–73% of AI inputs.
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Salesforce 2026	<i>AI service agents and customer satisfaction</i> . Data readiness cited as a major blocker by 72% of service teams.
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SalesforceDevOps.net 2025	<i>Salesforce and Informatica: context is the new currency</i> (December 2025). Salesforce's own results: 98% fewer tax adjustments, 20% fewer duplicate accounts, 85% of accounts enriched, 100% reduction in manual governance effort. Vendor-reported.
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Prepared by f/cx.ai. Volume III in a series with *Agentic AI Customer Experience & Innovation* (Volume I) and *The Agentic CX Build Blueprint & Guardrails* (Volume II). Informatica is part of Salesforce; both are named as sources, not endorsements. Dana, her records and all bands, thresholds and readings in figures are illustrative. Verify regulatory obligations against the primary legal text.