

Customer Data Readiness

Best Practices for Data Leaders

To power successful AI-driven experiences, your customer data must be more than just available—it must be **accurate, complete, timely, actionable, trusted, and compliant**.

To ensure your data is right and fit for purpose, every organization should adopt the following set of best practices. These principles position your data to power AI and CX initiatives—driving engagement and measurable impact at every customer touchpoint.

1

AI Use Case Priorities



Establish focus and alignment between AI goals and data strategy, ensuring data efforts are directed towards high-value outcomes.

- ☐ Have we clearly defined high-value AI use cases?
- ☐ Do we know which data sources are required for each use case?
- ☐ Are use cases categorized by complexity and data readiness?
- ☐ Are success metrics and measurement plans in place for AI initiatives?

2

Data Architecture & Modeling



Design and implement flexible, scalable data structures and ingestion strategies that support AI and enable comprehensive customer views.

- ☐ Do we have a flexible, industry-specific customer data model?
- ☐ Are all required data sources mapped to this model?
- ☐ Is our data ingestion strategy aligned with data freshness and delivery needs?
- ☐ Is metadata consistently applied to critical data assets?
- ☐ Are we integrated with a data catalog to standardize and expose metadata?

3

Data Quality & Trust



Automate and maintain high data quality, ensuring accuracy, consistency, and reliability across all data sets.

- ☐ Are data cleansing and standardization processes automated?
- ☐ Is data quality monitored continuously with alerts for anomalies?
- ☐ Are rules in place to minimize bias and ensure consistency in data?
- ☐ Are quality thresholds tuned for different use cases?
- ☐ Is metadata automatically updated and pushed downstream?



Unified Customer Profiles

4

Resolve identities, unify profiles, and enrich data to create actionable, comprehensive customer views that power insights and experiences.

- ☐ Are identities resolved across all systems and channels?
- ☐ Are profiles structured to support individual, household, or business views?
- ☐ Can our platform support near real-time or real-time profile unification?
- ☐ Are resolution rules adapted to each use case (e.g., marketing vs. risk)?
- ☐ Do we manage identity across the full lifecycle — from anonymous to known?
- ☐ Are calculated attributes (e.g., LTV, RFM, segments) part of our profiles?
- ☐ Is third-party data integrated to close data gaps and enrich profiles?
- ☐ Are curated traits aligned with activation, analytics, and AI use cases?
- ☐ Can enriched profiles be delivered to key systems? (e.g., via APIs, agents, decision engines)?



Data Governance & Compliance

5

Protect data while enabling its full value through robust governance policies, privacy controls, and compliance measures.

- ☐ Are governance policies grounded in unified customer identities?
- ☐ Are privacy and compliance requirements built into data flows (GDPR, CCPA, HIPAA, PCI)?
- ☐ Are access, rights, and consent controls exposed via metadata and APIs?
- ☐ Do our data protection and residency practices meet regulatory and internal requirements?

Unlock Your Data's Full Potential

If you're looking to strengthen your data foundation and accelerate your AI initiatives, **contact Redpoint** to discuss how we can help you get your data ready for action.

www.redpointglobal.com