Customer Data Readiness
Best Practices for Data Leaders

Redpoint™

To power successful AI and CX use cases, 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 Use Case Priorities

Establish focus and alignment between your organization's goals and data strategy, ensuring data efforts are directed towards high-value outcomes.

- [ ] 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 that align with the priority list?

2 Data Architecture & Modeling

Design and implement flexible, scalable data structures and ingestion strategies that support AI and CX use cases 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 our data environment set up to meet your privacy and security requirements?
- [ ] Does our data architecture support building active, contextual 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 made available where needed?

4 Unified Customer Profiles

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

- [ ] Are identities resolved across the full customer journey (systems, channels and lifecycle stages)?
- [ ] Are profiles structured to support individual, household, or business views?
- [ ] Can our platform support near real-time or real-time profile unification?
- [ ] Are all elements of our unified profile tuned to meet the needs of specific use cases? (e.g., marketing vs. risk?)
- [ ] Are calculated attributes (e.g., LTV, RFM, segments) part of our profiles?
- [ ] Is third-party data integrated to close data gaps and enrich profiles?
- [ ] Can enriched profiles be delivered to key systems? (e.g., via data-in-place, APIs, agents, decision engines)?

5 Data Governance & Compliance

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

- [ ] Do unified profiles include the identifiers and metadata details for accurate governance?
- [ ] Are privacy and compliance requirements built into data flows (GDPR, CCPA, HIPAA, PCI)?
- [ ] Are access, rights, and consent controls exposed via metadata and APIs?

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.

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