Informatica

Workbook

Fix Your Data, Optimize Your CX

CIO primer for data mastery and AI-driven customer experience wins

Where data & AI come to LIFE™

Contents

Executive Summary

The Urgency Behind Customer Data Transformation

The widening gap in customer experience stems from data foundations, not technology capabilities. The question isn't whether to build AI-ready customer data capabilities, it's whether your organization will be among the leaders who establish them today or the followers who spend the next 12-18 months trying to catch up.

The market reality: Organizations already deploying AI for customer experience are building advantage that compounds over time. Each quarter of delay makes the gap harder to close as competitors benefit from improved AI model performance based on a foundation of high-quality data, predictive insights enabled by comprehensive customer views and personalized experiences at scale backed by real-time capabilities.

The data foundation crisis: Our survey of 300+ business and IT leaders reveals that only 27% rate their customer data as "excellent," yet trustworthy, accessible data is needed for AI applications to succeed.[1] Organizations building AI on inadequate data foundations risk delivering poor customer experiences that actively damage relationships rather than build them.

The path forward: This guide provides the strategic roadmap to establish AI-ready customer data foundations and secure your leadership position.

Every month matters.

[1] www.informatica.com/lp/from-data-silos-to-ai-enabled-customer-engagement_5203.html

Section 1

The Customer Data Challenge – Why Speed Matters

Most organizations believe they understand their customers. The reality is far more complex. While 64% of IT professionals say they share a trusted 360-degree view across business lines, only 43% of business users agree.[2] This perception gap isn't just about technology. It's about the difference between having customer data and having customer insights that drive meaningful business outcomes.

Creating the 360-Degree View

The new CX baseline

Customer expectations have fundamentally shifted. Personalized experiences across every touchpoint, predictive engagement that anticipates needs before they're expressed and seamless omnichannel interactions are no longer competitive advantages — they're baseline expectations. Organizations delivering this level of customer experience are capturing measurable market share gains while competitors struggle with basic service consistency.

AI has accelerated this shift dramatically. What once took months to optimize now happens in real-time. What required teams of analysts now runs automatically.

The 180-degree reality

Achieving exceptional customer experience requires what most organizations don't have: a true 360-degree customer view. Traditional customer data approaches create a "180-degree view" — you see half the story. This occurs because organizations typically use only first-party data from direct interactions, while missing the broader ecosystem of influences, relationships and external factors that shape customer behavior. Even available data often remains trapped in departmental silos.

The results are costly:

- **Sales teams pursue opportunities** without understanding existing relationships or recent service issues
- **Marketing campaigns** send conflicting messages within the same account or household
- **Customer service representatives lack context** about recent purchases or ongoing issues
- **Account managers can't identify expansion opportunities** due to incomplete data

[2] www.informatica.com/lp/from-data-silos-to-ai-enabled-customer-engagement_5203.html

When AI meets fragmented data

These fragmented data gaps were expensive with traditional analytics. With AI, they become catastrophic. AI applications amplify whatever data quality exists — high-quality, unified data creates exceptional experiences at scale, while fragmented, inconsistent data creates embarrassing failures delivered to thousands of customers simultaneously.

Creating a true 360-degree customer view requires moving beyond fragmented data to unified customer intelligence. Organizations that achieve this comprehensive view gain sustainable competitive advantages through more effective engagement, accurate predictive insights and successful AI-powered experiences. Those without this foundation fall further behind each quarter.

See how Holiday Inn Club Vacations uses a 360-degree view for exceptional experiences.

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The AI Readiness Gap

The organizational disconnect

Building AI-ready customer data foundations requires more than technology; it demands organizational alignment that most companies haven't achieved. Our research reveals a significant disconnect between IT confidence and business reality:[3]

- While 42% of IT professionals are involved in AI strategy and development, business users report far less visibility into these initiatives
- 73% of IT professionals believe they collaborate effectively with business leaders on data infrastructure, but only 30% of business users agree
- Just 33% of business professionals see AI as critical to their customer experience strategy

This disconnect is dangerous. AI initiatives for customer experience demand higher data standards than traditional analytics, yet organizations are building AI capabilities on data foundations designed for transactional processing and basic reporting — not real-time customer intelligence.

[3] www.informatica.com/lp/from-data-silos-to-ai-enabled-customer-engagement_5203.html

The competitive window is closing

While internal teams struggle with misaligned priorities and inadequate data foundations, customer expectations rise and competitors with unified data strategies and aligned teams are establishing advantages that compound quarterly. The window for catching up narrows rapidly as AI-powered customer experience becomes table stakes for market competitiveness. Success requires five integrated capabilities working together as a foundation:

- **Real-time accessibility** across all customer touchpoints
- **Consistent data models** that enable machine learning at scale
- **Comprehensive relationship mapping** that captures the full customer ecosystem
- **Automated quality monitoring** that ensures data reliability for AI applications
- **Ethical governance frameworks** that enable responsible AI use

Implementing these capabilities separately risks creating new data silos that perpetuate the very problems AI was meant to solve.

See how TelevisaUnivision integrated capabilities for CX readiness.

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Assessing Your Current State

Before embarking on customer data transformation, honestly assess your current capabilities. Ask these questions:

Data Quality Assessment

- What percentage of your customer records have incomplete and inaccurate contact information?
- How many duplicate and inconsistent customer records exist across your systems?
- Can you trust your customer data enough to base automated decisions on it?

Collaboration and Accessibility

- Can you identify all systems that contain customer data across your organization?
- How easily can you assemble a complete view of a customer relationship from multiple data sources?
- Do your marketing and sales teams work from the same customer data?
- Does your customer data have appropriate security controls to protect sensitive information?

AI Readiness

- Is your customer data accessible through APIs for real-time applications?
- Do you have governance frameworks for ethical AI use with customer data?
- Is customer data being handled in accordance with data and AI regulations like EU AI Act, CCPA, HIPAA etc.

Use these answers to identify your biggest gaps and prioritize improvements that will most impact customer experience.

Section 2

Technology Foundation Requirements – Build for Speed and Scale

The difference between AI experiments and AI-powered customer experiences lies in the underlying data foundation. Successful organizations have moved beyond treating data unification, quality, governance and accessibility as separate IT projects. They use integrated platforms like Informatica's Intelligent Data Management Cloud (IDMC) that simplify data complexity while delivering the sophisticated enterprise-scale capabilities modern customer experience demands.

Master Data Management: The Competitive Foundation

The platform advantage for customer experience

Master data management (MDM) serves as the foundational layer that makes comprehensive customer views possible. Modern MDM platforms use AI to automate what once required extensive manual effort, enabling organizations to establish trusted customer data foundations in months rather than years.

Advanced customer identity resolution uses AI-driven algorithms that consider multiple data points — name, date of birth, address, contact information, behavioral patterns and business connections — to accurately identify and reconcile customer records across systems. The system recognizes that "Robert Barnes" and "Bob Barnes" with the same address are one individual, and that separate divisions belong to the same parent company.

Comprehensive relationship management addresses the inherent complexity of modern customer relationships, whether dealing with individual consumers or business accounts. Without understanding important relationship networks, organizations miss crucial context for customer engagement. MDM maps these complex structures automatically:

For B2B organizations:

- Parent-subsidiary relationships and corporate hierarchies
- Multi-location organizations with different operational units
- Partnership networks including suppliers, distributors and system integrators
- Individual contact relationships within organizational buying committees

For B2C organizations:

- Household relationships and family structures that affect purchasing decisions
- Individual lifecycle changes including moves, life events and preference evolution
- Cross-product relationships for customers who engage with multiple lines of business

Historical relationship tracking shows how customer structures evolve over time, enabling organizations to anticipate customer needs and deliver proactive experiences.

Data standardization and enrichment ensure customer records are not only unified but are also accurate and complete. Modern platforms standardize formats, correct common errors and enrich records with additional information from trusted sources, all without manual intervention. Organizations with automated data standardization deliver more relevant customer experiences and deploy AI applications more effectively.

Seamless platform integration enables MDM to work within existing technology investments while supporting future innovations. Pre-built connectors for common business applications, API-first architecture for both batch and real-time integration, and cloud-native deployment options provide the scale needed for enterprise customer data volumes.

Organizations deploy trusted customer data foundations in weeks rather than quarters with Informatica's MDM, automating complex matching, relationship mapping and data quality processes with AI, which handles the complexity of identity resolution across billions of records at enterprise scale.

The result: golden records that provide the foundation for customer experience, with AI automation simplifying the complexity of maintaining data quality and consistency.

See how RS Group unified customer data with MDM.

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Data Quality and Governance Excellence

Essential quality attributes for customer experience advantage

Data quality isn't abstract. It's the foundation that makes great customer experience outcomes possible. Four essential attributes directly impact customer relationships:

- **Accuracy** ensures customer data correctly represents reality, preventing embarrassing customer interactions and irrelevant AI recommendations.
- **Completeness** addresses missing data that creates blind spots in customer understanding, enabling personalized experiences and accurate predictions about customer needs.
- **Consistency** eliminates contradictory data across systems, ensuring customers receive coherent experiences across all touchpoints.
- **Timeliness** reflects current customer status, preventing AI from making decisions based on outdated customer behaviors or preferences.

These attributes are strategic levers for customer trust, operational efficiency and AI performance.

Governance that enables customer experience innovation

Effective governance balances data protection with business agility. Customer data governance must be business-led and outcome-focused, enabling AI applications to access comprehensive customer data while maintaining strict privacy compliance. Three key elements create this balance:

- **Data stewardship aligned with business expertise** ensures teams closest to customer relationships manage relevant data domains, enabling faster decision-making for customer experience initiatives.
- **Cross-functional governance bodies** include business and IT representatives focused on resolving data conflicts and establishing quality standards for customer-facing applications and AI-powered decision-making.
- **Automated governance and quality monitoring** leverages AI to maintain data standards at scale while supporting real-time AI applications.

Informatica's unified approach to data quality and governance eliminates the complexity of integrating multiple point solutions. IDMC provides consistent data quality rules, governance policies and access controls across MDM, analytics and AI applications. This ensures customer data maintains the same standards regardless of where or how it's used.

These frameworks include robust access management that enables organizations to innovate safely with customer data while preserving its integrity, privacy and security.

See how Gilead improved data quality for CX outcomes.

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AI-Ready Data Architecture

Built for real-time customer intelligence

Traditional data architectures have focused on capturing and storing customer information. AI-driven customer experience requires architectures designed for consumption — by both humans and machines, in real-time, across all customer touchpoints. Three essential capabilities are found in modern AI-ready architectures:

- **API-first data architecture** provides real-time customer data access across all touchpoints through standardized interfaces. Customer service, website personalization, marketing and sales, all leverage consistent data for coordinated engagement.
- **Event-driven data sharing** enables immediate response to customer behaviors across all systems. When customers download content, update profiles or contact support, information immediately flows to relevant teams and AI applications.
- **Data marketplace capabilities** make high-quality customer data discoverable and accessible while maintaining governance. Business teams maintain momentum, ensure compliance, and can find and use customer insights without IT bottlenecks.

Performance for seamless customer experiences

AI's value in customer experience comes from intelligent decisions made in the moment — recommending relevant content, routing to the best service agent or triggering personalized marketing messages. This requires data architectures that support sub-second response times through three critical infrastructure elements:

- **In-memory processing** keeps critical customer data — preferences, recent interactions, risk scores — available for immediate access, enabling instant personalization.
- **Predictive caching** uses AI to anticipate which customer data will be needed, making it immediately available when customers interact with your brand across web, mobile and service channels.
- **Centralized feature engineering** creates shared pipelines ensuring AI models use consistent customer data transformations and calculations, preventing conflicting insights and enabling coherent experiences regardless of touchpoint.

Informatica's cloud-native IDMC architecture delivers these capabilities at enterprise scale, providing real-time data access across hybrid and multi-cloud environments. Organizations serving millions of customers benefit from the same platform trusted by 80+ Fortune 100 companies to power real-time AI applications.

These architectural capabilities transform customer data from a static resource into a dynamic engine for competitive advantage.

See how Citizen's Bank deployed AI-ready architecture for real-time CX.

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Why Leading Organizations Choose Informatica

Organizations building AI-ready customer data foundations choose Informatica's Intelligent Data Management Cloud (IDMC) for decisive advantages:

- **AI-Powered Automation** – Dramatically reduce manual data management effort through intelligent automation of matching, quality monitoring and governance processes
- **Unified Platform** – Eliminate the complexity and cost of integrating multiple point solutions with a single cloud-native platform for MDM, data quality, governance and integration
- **Proven at Enterprise Scale** – Deploy confidently a platform trusted by 5,000+ customers including 80+ Fortune 100 companies to manage customer data at billions of records with sub-second response times
- **Rapid Time to Value** – Compress implementation timelines from quarters to weeks while reducing customization requirements with industry-specific accelerators and templates
- **Cloud-Native Architecture** – Support hybrid and multi-cloud deployments with consistent capabilities across on-premises, AWS, Azure, Google Cloud and Snowflake environments

The platform powering AI-driven customer experiences for the world's most demanding enterprises.

Vendor Evaluation Criteria

When evaluating platforms for your customer data strategies, look for comprehensive capabilities like those in Informatica's IDMC that simplify complexity across these critical dimensions:

Platform Capabilities

- ❑ Handles complex B2C and B2B customer relationships, including hierarchies and multi-contact accounts
- ❑ Provides sophisticated AI-powered matching algorithms and identity resolution
- ❑ Supports feature engineering and real-time model serving
- ❑ Offers pre-built connectors for your existing systems

Data Quality & Governance

- ❑ Automates data profiling, quality monitoring, and real-time data validation and correction
- ❑ Supports business-led data stewardship and governance processes
- ❑ Enforces privacy policies and consent management automatically
- ❑ Includes robust security controls for customer data protection
- ❑ Maintains data consistency across distributed cloud environments

Business User Experience

- ❑ Provides intuitive interfaces for business users to access and understand customer data
- ❑ Helps business users create their own data products and analytics without technical expertise
- ❑ Enables self-service data discovery and quality assessment
- ❑ Supports collaboration between business and technical teams

Implementation Approach

- ❑ Follows proven methodology with industry-specific templates, data models and best practices
- ❑ Minimizes custom development requirements through extensive configuration capabilities
- ❑ Provides comprehensive training and change management support throughout implementation
- ❑ Offers transparent TCO models including licensing, implementation and ongoing support costs

Vendor Partnership

- ❑ Demonstrates clear ROI from customer data investments
- ❑ Offers a track record for long-term customer success
- ❑ Shows commitment to platform evolution aligned with AI and CX trends

Prioritize vendors who use AI to simplify data management complexity while providing the sophisticated capabilities your customer experience strategy requires.

Section 3

Implementation Strategy

Having the right technology foundation is only half the equation for customer data success. Without structured implementation methodologies, organizations risk expensive platform investments that fail to deliver the customer experience improvements and AI readiness that drive competitive advantage.

Phased Approach to Customer Data Transformation

Roadmap with clear milestones

Customer data initiatives succeed when a structured plan is followed that delivers value incrementally while building toward comprehensive capabilities. The following phases represent a sample enterprise-level roadmap that can be compressed for rapid value or extended based on organizational complexity.

Phase 1: Foundation

Establish basic customer data capabilities while delivering immediate value to build momentum and stakeholder confidence:

- **Core system integration** connects critical customer-facing systems across executive, service, sales and marketing
- **Basic data quality implementation** addresses duplicate records, invalid contact information and incomplete customer profiles
- **Pilot use case execution** demonstrates clear business value through improved segmentation, customer onboarding, service interactions or marketing campaigns
- **Governance framework development** defines data policies, assigns stewardship responsibilities and establishes quality standards

Success criteria: measurable improvements in data quality metrics, customer experience outcomes and demonstrated ROI from pilot projects.

Phase 2: Evolve and Enhance

Build on foundational capabilities to create more comprehensive customer views and enable advanced use cases:

- **Digital touchpoint integration** adds behavioral context from websites, mobile apps and social media
- **Advanced MDM deployment** implements sophisticated identity resolution, relationship mapping and data standardization
- **AI and analytics foundation** deploys predictive capabilities for churn risk, lifetime value and next best action
- **Data marketplace development** enables self-service access while maintaining governance

Success criteria: unified customer views across touchpoints, measurable improvements in marketing effectiveness, self-service capabilities for business users and customer satisfaction growth.

Phase 3: Optimize and Scale

Expand existing capabilities and scale successful initiatives across the entire organization:

- **Real-time processing** enables immediate response to customer behaviors and interactions across all channels
- **Advanced AI applications** deploy recommendation engines and personalization platforms
- **Cross-channel orchestration** creates seamless omnichannel experiences
- **Continuous optimization** establishes ongoing improvement processes

Success criteria: real-time AI capabilities deployed at scale, measurable competitive advantage through enhanced customer experiences and continuous process improvement that sustain CX leadership.

Technology and investment planning

Choose platforms designed for evolution with cloud-native architecture, API-first design and modular capabilities that support incremental implementation across all phases.

Customer data initiatives represent significant investments extending beyond initial licensing costs. Plan for total cost of ownership including implementation services and data migration costs, ongoing operations including support and maintenance, training and adoption support and scalability economics as data volumes grow.

See how Telus achieved rapid ROI with phased implementation.

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Business-IT Alignment

Create shared language and objectives

IT teams naturally think in terms of systems and technical capabilities. Business teams focus on customer outcomes. Successful customer data initiatives require translating between these perspectives and establishing shared objectives.

- **Business-driven requirements** start every initiative with clear customer experience objectives. Instead of asking "What customer data do we need to integrate?" ask "What customer experiences do we want to enable?" This shift ensures technical decisions support business outcomes.
- **Outcome-based success metrics** measure initiatives by their impact on customer experience — satisfaction scores, retention rates, email bounce rates, conversion improvements — rather than technical metrics like system uptime.
- **Joint planning and prioritization** include both business and IT representatives in decision-making, using business impact assessments to prioritize technical investments and gain alignment on expected outcomes.

Build cross-functional capabilities

Bridging business needs and technical capabilities requires new roles and governance structures:

- **Business data translators** understand both customer experience requirements and data capabilities, translating between business and technical perspectives.
- **Customer data product managers** treat customer data as a product serving internal customers, focusing on user experience and value delivery.

- **Cross-functional governance bodies** include representatives from all customer-facing functions and IT, with authority to make decisions about data priorities, quality standards and access policies.

Drive adoption through change management

Customer data initiatives require changes in processes, systems and behaviors. Success depends on managing these changes effectively:

- **Communication strategy** explains why customer data improvements matter, what changes are required and what benefits to expect, tailored for different audiences, emphasizing business value.
- **Training and support** provide comprehensive education and ongoing assistance with role-based programs for different skill levels.
- **Adoption measurement** tracks business outcome improvements, not just system usage, celebrating successes along the way.

When business and IT work from shared objectives and common language, organizations can focus on what matters most: measuring and demonstrating customer experience improvements that drive competitive advantage.

See how JetBlue aligned business and IT for CX success.

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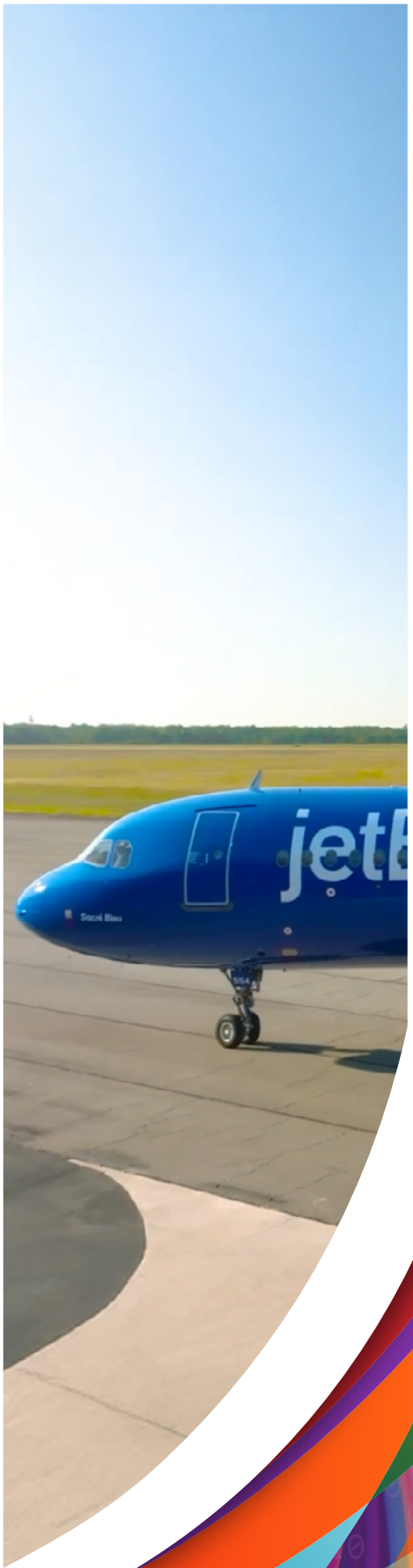

Collaboration Best Practices

Building the relationships that drive successful implementation

Customer data initiatives require strong internal sponsorship and external partnerships to navigate technical complexity and organizational change.

Executive sponsorship essentials

Executive sponsors resolve conflicts between business and IT priorities and provide necessary resources:

- **Clear communication** about initiative importance and expected outcomes
- **Decision authority** when business and technical perspectives diverge
- **Adequate funding** for implementation, training and change management
- **Visible commitment** to a culture of data-driven decision making

Vendor partnership success factors

Look for partners who provide customer experience expertise, not just technology deployment:

- **Understand** your customer experience objectives rather than leading with technical features
- **Offer** industry-specific methodologies and documented success with similar organizations
- **Comprehensive** training, adoption assistance and change management support
- **Focus** on expanding capabilities and ongoing optimization beyond initial deployment

Risk mitigation priorities

Early risk identification prevents costly delays and scope changes:

- **Technical risks**: integration complexity, performance requirements and scalability
- **Business risks**: user adoption resistance, competing priorities and changing requirements
- **Governance risks**: data privacy compliance, security vulnerabilities and regulatory changes
- **Partnership risks**: vendor roadmap alignment, support quality and long-term viability

Develop mitigation strategies for each risk, assign ownership and review status regularly.

Section 4

Measuring Success and ROI

With strong business-IT alignment established, the focus shifts to demonstrating measurable value from customer data investments. Sustaining executive support and stakeholder confidence requires clear metrics that connect data improvements to customer experience outcomes and business results.

Key Performance Indicators

Leading and lagging indicators

Successful measurement frameworks include both leading indicators that predict future success and lagging indicators that measure ultimate business impact.

Leading indicators provide early signals of initiative success:

- **Data quality improvements** track reductions in duplicate records, increases in profile completeness and improvements in data accuracy rates
- **Process efficiency gains** measure faster campaign launches, reduced data preparation time and improved self-service access
- **User adoption metrics** include increased usage of new capabilities and improved satisfaction with data tools
- **System performance improvements** track query response times and integration reliability for real-time applications

Lagging indicators measure long-term business impact:

- **Customer experience improvements** include higher satisfaction scores, increased retention rates and improved service resolution times
- **Revenue impact** encompasses increased conversion rates, higher customer lifetime value and improved cross-sell success
- **Cost reductions** result from lower acquisition costs, reduced operational expenses and decreased compliance overhead
- **Competitive advantage** manifests through faster time-to-market, improved responsiveness to customer needs and market share gains.

Business model-specific metrics

Early wins from leading indicators generate the organizational buzz and stakeholder buy-in needed to sustain initiatives until lagging indicators can demonstrate measurable business impact.

Focus on metrics that matter most for your business model:

Relationship-driven businesses require metrics that capture complex, long-term customer connections:

- Account penetration tracks coverage across business units, buying committee members and decision-making networks
- Relationship quality measures buying committee engagement depth, and stakeholder satisfaction across organizational levels

Transaction-driven businesses focus on volume, efficiency and conversion optimization:

- Sales velocity tracks quote-to-close rates, sales cycle acceleration and channel partner transaction volumes
- Revenue per interaction measures deal size growth, pricing optimization and cross-sell effectiveness

Service-driven businesses emphasize experience quality and customer success outcomes:

- Customer success tracks account health scores, milestone achievement and service level agreement performance
- Experience consistency measures service delivery across multiple locations and touchpoints

See how Rodobens demonstrated ROI through targeted KPIs.

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Building Data Culture

Evolve from metrics to organizational capability

Successful measurement requires organizational cultures that embrace data-driven decision making. Strong data culture drives adoption, creates buy-in for sustained investment and enables organizations to adapt to market changes and deploy AI applications with confidence.

Develop organizational data literacy

Data literacy enables teams to understand and use data so they can interpret measurements, make informed decisions and communicate insights effectively. Tailored training programs connect data skills to job functions. Business users focus on data interpretation for customer experience decisions; while IT professionals learn to connect technical capabilities to business outcomes. When teams understand both perspectives, they become advocates who bridge silos and drive adoption.

Enable rapid experimentation

Data culture enables organizations to move faster through immediate feedback on customer experience improvements. Teams see immediate results from customer data initiatives, creating confidence to experiment with personalization, service or marketing campaigns. Evidence-based decision making replaces intuition with data-supported strategies.

Advance sustainable transformation and AI readiness

Strong data culture creates the foundation for long-term success. Self-sustaining adoption reduces the need for constant executive oversight by creating teams that independently recognize data value. When data literacy spreads throughout the organization, measurement becomes a natural business process. This prepares organizations for advanced customer experience applications by building the data literacy, governance awareness and ethical thinking needed for responsible AI deployment.

See how Takeda built data culture for sustained CX advantage.

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Business Value Assessment

A structured approach helps technical teams communicate business value in terms that resonate with executives. Use this framework to translate data improvements into compelling business outcomes:

Business Context Assessment

- ❑ Identify specific business imperatives driving your customer data initiative
- ❑ Understand how customer data challenges impact strategic goals
- ❑ Articulate competitive advantages you're seeking through data improvements

Use Case Prioritization

- ❑ Identify which customer experience improvements will deliver the highest business impact
- ❑ Prioritize use cases based on feasibility and potential ROI
- ❑ Map use cases to specific business outcomes and stakeholder interests

Measurement Framework Design

- ❑ Establish baseline metrics for progress tracking
- ❑ Design measurement approaches that align with your business model
- ❑ Identify the tools and systems needed for ongoing measurement

Executive Communication Planning

- ❑ Develop a strategy for presenting results to different stakeholder groups
- ❑ Translate technical improvements into business language that resonates with executives
- ❑ Establish regular reporting and reviews and adapt based on stakeholder feedback

A structured business value assessment ensures measurement frameworks align with business objectives and provide the foundation for sustained executive support.

The Time to Act Is Now

The path from data silos to AI-enabled customer engagement isn't just a technology upgrade — it's enterprise transformation that separates market leaders from followers. Organizations positioned to lead with AI are taking decisive action now to build trusted, accessible, AI-ready customer data foundations. Any delay risks permanent disadvantage as AI capabilities become table stakes rather than differentiators.

Your next step is immediate: Evaluate your current customer data capabilities and develop a strategic transformation roadmap. Each moment of delay widens the gap between your ambitions and your ability to deliver.

Accelerate your progress by starting with Informatica's **Customer Data Strategies workbook** — a practical toolkit containing detailed frameworks, assessment tools and implementation templates that help you:

- **Assess maturity** across technology, processes, data management and analytics
- **Prioritize initiatives** delivering immediate impact alongside scalable capabilities
- **Define business-driven success metrics** clearly tied to ROI
- **Foster collaboration** between business and IT teams aligned on customer experience goals

Download the Customer Data Strategies Workbook

Build your AI-enabled CX foundation on the platform trusted by 80+ Fortune 100 companies. Start with Informatica's proven IDMC platform — today.

DOWNLOAD THE WORKBOOK

Contact our specialists to discuss your specific requirements.

About Us

Informatica (NYSE: INFA), a leader in AI-powered enterprise cloud data management, helps businesses unlock the full value of their data and AI. As data grows in complexity and volume, Informatica's Intelligent Data Management Cloud™ delivers a complete, end-to-end platform with a suite of industry-leading, integrated solutions to connect, manage and unify data across any cloud, hybrid or multi-cloud environment. Powered by CLAIRE® AI, Informatica's platform integrates natively with all major cloud providers, data warehouses and analytics tools — giving organizations the freedom of choice, avoiding vendor lock-in and delivering better ROI by enabling access to governed data, simplifying operations and scaling with confidence.

Trusted by about 5,000 customers in nearly 100 countries — including over 80 of the Fortune 100 — Informatica is the backbone of platform-agnostic, cloud data-driven transformation.
Informatica. Where data and AI come to life.™

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