

Is your Customer Data Strategy Ready for AI?

AI Disruption Readiness Assessment

Introduction

Your buyers are making decisions inside ChatGPT, Perplexity, and Google AI Overviews, many times without ever visiting your website. If your content isn't machine-readable, your data isn't current, and your measurement can't track AI-moderated journeys, you're either invisible or misrepresented in the moments that matter.

This creates three immediate risks: **invisibility** (AI can't find you), **inaccuracy** (it surfaces wrong info about you), and **immeasurability** (your attribution is blind to these journeys).

This **15-minute assessment** scores you across six critical dimensions and gives you a concrete 90-day roadmap. You'll know exactly where you're exposed and what to fix first.

How to Use This Assessment

This assessment helps marketing leaders identify blind spots as buyer behavior shifts to using more AI-first discovery (ChatGPT, Perplexity, AI Overviews, shopping assistants).

For each statement below, score yourself:

- **0 = Not in place** (or don't know)
- **1 = Partially implemented** (in progress or incomplete)
- **2 = Fully operational** (live, monitored, and working)



PART 1: AI Channel Readiness (16 points possible)

Are you visible and accurate where AI makes recommendations?

#	Capability	Score 0-2
1.1	Data completeness: Our top 20 products/services have complete, accurate information (category, specs, pricing, availability, use cases) in our CMS/PIM	___
1.2	Machine-readable content: We've implemented structured data (schema.org) for our key offers and validated it	___
1.3	Plain-language answers: We have a comprehensive FAQ hub (25+ questions) written for AI assistants to parse and cite	___
1.4	Assistant attribution: We can identify and measure traffic, leads, and pipeline from AI assistants/answer engines in our analytics	___
1.5	Content freshness: We have defined SLOs for updating critical fields (pricing, availability, specs) and meet them consistently	___
1.6	Provenance tracking: Every piece of AI-facing content has documented source, owner, approval date, and expiration	___
1.7	Conflict resolution: We have a single source of truth that prevents conflicting information across channels	___
1.8	Recovery plan: We have a documented process to quickly correct misinformation if an AI surfaces wrong data about us	___

Subtotal Part 1: ____ / 16

PART 2: Measurement & Attribution (14 points possible)

Can you prove what's working when journeys are fragmented?

#	Capability	Score 0-2
2.1	Server-side tracking: Critical conversion events (leads, purchases, signups) are captured server-side, not just client-side	—
2.2	Conversion APIs: We've implemented and validated platform Conversion APIs (Meta, Google, etc.) with proper deduplication	—
2.3	Consent architecture: Consent status travels with every event and is enforced in real-time across all channels	—
2.4	Event parity: We monitor and reconcile client-side vs server-side event volumes and investigate discrepancies	—
2.5	Incrementality testing: We run holdout or geo-split tests on major channels to measure actual lift, not just attributed conversions	—
2.6	Outcome taxonomy: Sales and Marketing have agreed on primary outcomes, micro-conversions, and quality signals (documented)	—
2.7	Cross-channel identity: We can connect anonymous, pseudonymous, and authenticated activity with documented match rates	—

Subtotal Part 2: ____ / 14

PART 3: Real-Time Personalization (12 points possible)

Can you assist buyers in the moment of intent?

#	Capability	Score 0-2
3.1	Micro-intent detection: We've defined 8-12 in-session signals that predict buyer needs (e.g., pricing loops, form hesitation)	___
3.2	Sub-200ms response: Our personalization/assistance triggers fire fast enough to be helpful (not after the moment has passed)	___
3.3	Transparent triggers: Every personalized nudge explains why it appeared ("Based on your interest in...")	___
3.4	Frequency caps: We have guardrails preventing trigger storms and overlapping messages	___
3.5	Assist metrics: We measure nudge effectiveness (conversion lift) and suppression value (saved waste)	___
3.6	Preference enforcement: Buyers can opt down from specific types of personalization without opting out of everything	___

Subtotal Part 3: ____ / 12

PART 4: Data Infrastructure (12 points possible)

Is your data architecture ready for AI activation speeds?

#	Capability	Score 0-2
4.1	Activation strategy: We have a documented decision tree for when and where to activate from (triggered, batch, real-time)	—
4.2	Golden features: Reusable derived attributes (recency, engagement score, risk flags) are centrally defined with clear owners	—
4.3	Freshness SLOs: Each destination has documented data freshness requirements and we monitor/alert on violations	—
4.4	Centralized logic: Business rules and transformations live in the least possible places (not duplicated across tools)	—
4.5	Identity resilience: Our identity graph has documented tiers, match rules, and decay windows	—
4.6	Observability: We can see staleness, drift, and reconciliation gaps across our data pipeline in near real-time	—

Subtotal Part 4: ____ / 12

PART 5: AI Governance (10 points possible)

Are your customer-facing AI applications safe and compliant?

#	Capability	Score 0-2
5.1	Content provenance: AI-facing content has documented source, rights, approval, and expiration (enforced at publish)	___
5.2	Approved prompts: We have a library of tested, safe prompt/response patterns (with PII redaction rules)	___
5.3	Evaluation harness: We test AI outputs for accuracy, bias, and safety before and during production use	___
5.4	Rollback capability: We can quickly disable or correct AI-generated content if it goes wrong	___
5.5	Audit trail: All AI-generated customer interactions are logged with model version, input, output, and user feedback	___

Subtotal Part 5: ____ / 10

PART 6: Operating Model (8 points possible)

Do you have the team structure and cadence to move fast?

#	Capability	Score 0-2
6.1	Clear ownership: One named person owns AI data quality, freshness, and policy (not a committee)	_____
6.2	Cross-functional team: We have a standing team (PMM, Ops, Engineering, Privacy, Sales) meeting weekly on AI readiness	_____
6.3	Fast experimentation: We run weekly test cycles on AI-exposed surfaces with clear decision gates	_____
6.4	Learning capture: Experiment insights become reusable rules/features (not one-off reports)	_____

Subtotal Part 6: _____ / 8

Your Total Score

Section	Your Score	Possible
Part 1: AI Channel Readiness		16
Part 2: Measurement & Attribution		14
Part 3: Real-Time Personalization		12
Part 4: Data Infrastructure		12
Part 5: AI Governance		10
Part 6: Operating Model		8
TOTAL		72

What Your Score Means

58-72 : AI-Ready Leader

You're ahead of the curve. You have strong foundations in place. Focus on optimization, advanced testing, and becoming a reference case for your industry.

Recommended next steps:

- Benchmark your assistant-attributed pipeline against industry peers
- Share learnings internally and consider publishing thought leadership
- Identify 2-3 advanced capabilities (predictive scoring, bandit testing) to pilot

36-57 : Building Momentum

You're making progress but have gaps. Your lowest-scoring sections are your highest-risk areas. Prioritize those to prevent revenue leakage.

Recommended next steps:

- Review your lowest-scoring section with stakeholders
- Create a 90-day sprint plan for your bottom two sections
- Audit your top 20 offers for data completeness

Common gaps at this level:

- Server-side tracking incomplete or not deduplicated
- No way to attribute AI assistant traffic
- Personalization exists but lacks guardrails or transparency
- Data freshness relies on manual updates

0-35 : Urgent Attention Needed

You have significant exposure. As buyer behavior shifts to AI-first discovery, you risk becoming invisible or misrepresented. Immediate action required.

Recommended next steps:

- Schedule a 90-minute workshop with Marketing, Analytics, Data, and Privacy leads
- Prioritize Part 1 (AI Channel Readiness) and Part 2 (Measurement) first
- Assign a single owner to drive execution (see Operating Model section)
- Consider bringing in external expertise to accelerate

Next Steps

Ready to accelerate your journey to AI maturity? Contact Tealium to discuss how we can help you build the solid data foundation required for successful AI implementation.

Connect with a Tealium expert

Visit <https://tealium.com/cdh-demo-2/> to get started.



Appendix: Glossary

AI Assistant / Answer Engine: Tools like ChatGPT, Perplexity, Google AI Overviews, Bing Chat that provide synthesized answers and recommendations, often without directing users to traditional websites.

Conversion API: Server-side integration that sends conversion data directly from your server to ad platforms, bypassing browser-based tracking limitations.

Event Deduplication: Preventing the same conversion from being counted multiple times when both client-side and server-side tracking are active.

Golden Features: Reusable derived data attributes (e.g., "days since last purchase," "engagement score") calculated once and shared across systems.

Incrementality Testing: Measuring the actual lift caused by a marketing action by comparing outcomes to a holdout group that didn't receive the action.

Micro-Intent: Small behavioral signals (e.g., returning to pricing page 3x, hovering on CTA) that predict user needs.

Provenance: Documentation of content source, ownership, rights, approval date, and expiration—critical for AI governance.

Schema.org / Structured Data: Standardized markup that helps search engines and AI systems understand your content (products, reviews, FAQs, etc.).

Server-Side Tracking: Capturing user events on your server rather than relying solely on browser-based (client-side) tracking, which is increasingly blocked.