

Step 1. What is the actual complaint?

The problem, in one sentence

Step 2. Score the five diagnostics

Known people

Live conversations

Anonymous activity

Volume and variety

A diagram showing five boxes arranged horizontally, labeled 1, 2, 3, 4, and 5. Each box is a light blue square with a thin green border. The boxes are empty, representing the initial state of the array.

Automation ambition

Reading it: High on the first two and low on the rest means CRM. High on the last three means CDP. High across the board means both, and you should sequence them rather than buy at once. Low across the board means the problem is probably process, not software.

Step 3. Where does customer information live today?

[illegible]

Step 4. What would you automate first?

Automation 1

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Automation 2

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Step 5. If you end up with both

Decision	Our answer
Which system is authoritative for contact details?	
What behavioural signals go into the CRM, and in what form?	
Which direction does each field sync, and how often?	
Who owns data quality across both?	

Two warnings. Do not dump raw behavioural logs into your CRM, push signals and scores instead. And settle field ownership before you connect anything, or two systems will both think they own the customer's email address and you will get a sync loop.