

Pre-Flight Integration Inventory

8 Questions to Answer Before Starting a CX or AI initiative

Use this quick check to spot integration, data, and ownership gaps early, before they slow delivery or limit the value of your program.

1. Event Sources Which systems can trigger a customer-relevant event? ☐ Billing ☐ Order status ☐ Shipment tracking ☐ Device telemetry ☐ Service notifications ☐ Other: _____	2. Systems of Record Where do your key customer and operational data live? ☐ CRM ☐ ERP ☐ WFM ☐ Identity Platform ☐ Other: _____
3. Actions & Automation What actions can be completed directly from these systems? ☐ Update customer records ☐ Authorize requests ☐ Create cases ☐ Schedule service ☐ Process transactions ☐ Other: _____	4. Identity Resolution Can you connect customer information across systems without human effort? ☐ Device → Asset ☐ Asset → Account ☐ Account → Contact ☐ Contact → Case Where are the gaps? _____
5. Data Flow Do you know where customer interaction and operational data are stored and shared? ☐ Yes ☐ Partly ☐ Not consistently	6. Approval Thresholds Which actions can be automated without human review? ☐ Credit ☐ Replacement ☐ Service dispatch ☐ Escalations
7. Audit & Governance Can you explain why an automated decision was made? ☐ Yes ☐ Sometimes ☐ No	8. Journey Ownership Which platform owns the customer journey? ☐ CX platform ☐ CRM ☐ Multiple ☐ Not defined

QUICK SELF-ASSESSMENT

How many questions can you answer confidently today?

0–3 Start with the foundations	4–6 Good base, with gaps to address	7–8 Strong starting point
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Want a second opinion?

Miratech can help you review the gaps, agree priorities, and define practical next steps. Visit miratechgroup.com to learn more and connect with our team