

# Customer 360 Workflow Survival Test

Use this worksheet before Customer 360 profile data powers AI suggestions, routing, personalization, or automation.

## 1. Workflow being tested

- Workflow name: \_\_\_\_\_
- What customer or revenue work will change: \_\_\_\_\_
- Destination surface: CRM / lifecycle platform / CS tool / support tool / AI assistant / other
- Lowest useful launch mode: context only / suggest / assist / route / act

## 2. Identity and field ownership

- Entity grain: account / contact / user / subscription / opportunity / household
- Match logic owner: \_\_\_\_\_
- Critical fields used by the workflow: \_\_\_\_\_
- Each field has source, timestamp, and owner: yes / no / needs review

## 3. Lifecycle, consent, and suppression

- Lifecycle state checked against CRM, billing, product, and support: yes / no / needs review
- Consent, opt-out, region, and contractual restrictions enforced: yes / no / needs review
- Suppression rules for open deals, open cases, strategic accounts, and holdouts: \_\_\_\_\_
- Who can pause the workflow: \_\_\_\_\_

## 4. Reason codes and destination context

- Reason code visible to the user: yes / no / needs review
- Destination owner reviewed field meaning and display: yes / no / needs review
- What the user should do with the signal: \_\_\_\_\_
- What the user should not do with the signal: \_\_\_\_\_

## 5. Exception and rollback path

- Human review threshold: \_\_\_\_\_
- Bad match / stale field / false positive owner: \_\_\_\_\_
- Rollback path: pause workflow / revert field / remove audience / open review queue / other
- First real-example review date: \_\_\_\_\_

## 6. Readiness decision

- Choose one: profile exists / profile trusted / workflow-ready / AI-ready
- If blocked by source trust or matching: Data Foundation
- If blocked by authority level, review gates, or workflow risk: AI Readiness Audit
- If clear and ready to wire: Data Activation

## How to use the result

- A profile that only exists belongs in research and dashboard context.
- A trusted profile can support human review and planning.
- A workflow-ready profile can power governed routes, triggers, and reviewed AI suggestions.
- An AI-ready profile has authority level, review gates, rollback, and real-example review named.