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Managing Online Customer Data: A Realistic Business Problem

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ABSTRACT: This article examines the rapid growth of Real-Time Customer Data Platforms (RTCDPs) and their implications for businesses, aiming to enhance real-time data accessibility and maximize profitability. Companies should adopt a transparent management approach to minimize the impact of often-dramatic changes in processes, workflows, and organizational culture when using RTCDPs. Using qualitative case study and in-depth with top business managers, the article pinpoints five critical themes that facilitate successful online customer data management system: (i) Holistic Planning – a complete integration of different services or departments; (ii) Stakeholder Engagement – relevant parties must buy-in to new processes; (iii) Training Programs – get employees trained; (iv) Data Governance and Privacy – make sure data integrity is secured through compliance (v) Pilot Programs - Lets test and refine. The results are intended to provide practical, effective strategies for successfully integrating real-time customer data platform management, which may lead to greater satisfaction for both companies and customers in today's data-driven business environment.

Keywords: - *Real-Time Customer Data Platforms, Migration to Real Time, Customer Satisfaction, and Transparent Change Management*

I. INTRODUCTION

In 2025, 88% of businesses considered using a real-time data system critical to achieving business goals. Additionally, 92% of companies with a Real-Time Customer Data Platform (RTCDP) reported meeting or exceeding their objectives (Tealium, 2025). Companies with real-time customer data management can respond to fast-changing market pressures, monitor trends, optimize operations, and deliver more personalized customer service (Rahman, 2025). Furthermore, organizations can proactively respond to customer needs by anticipating future demands. This capability is more important than ever in today's highly dynamic and competitive business environment, where customer experience expectations continue to grow. A Real-Time Customer Data Platform (RTCDP) combines data from multiple sources to create a comprehensive view of customers and provide a deeper understanding of how consumers relate to the business, what they like, and how they behave in the market. A Real-Time Customer Data Platform (RTCDP) enables businesses to access real-time data and act on it to keep customers happy, ultimately leading to a sustainable competitive advantage and profits.

Managing data in organizations is now a foundational driver of real-time business practices, helping increase ownership visibility and success projections. Luamba (2019) argued that innovation allows organizations to recognize the value of real-time data management for sustainability and productivity. Enabling organizations to analyze data in real-time allows them to respond quickly to rapidly evolving market conditions, spot trends and anomalies, improve operations, and deliver more personalized customer experiences (Almondo, 2025; Celestin et al., 2025). This is especially true in today's business environment, with its shifting landscape of real-time approaches and customized services. Real-Time Customer Data Platform (RTCDP) management is a building block of systems that provides a comprehensive picture of how customers interact with businesses, what they like, and how they behave. By allowing companies to implement a Real-Time Customer Data Platform (RTCDP), they can enable better decision-making and a smoother, more supportive journey, ultimately resulting in success.

II. PROBLEM STATEMENT

Organizations face challenges during migrations to real-time customer data platforms and often struggle to realize technical and operational gains or improve customer engagement. Seventy to eighty-four percent of companies fail in their attempts to digitally transform because they do not integrate new technologies effectively and experience low user adoption of innovation (Bain & Company, 2024; Boston Consulting Group, 2024). Challenges include determining the best way to integrate new systems with existing technology stacks and addressing the complexity of growing data volumes and user skill levels. Not only that, but a lack of training and an unwillingness to change can compound these problems, resulting in increasingly unengaged and dissatisfied customers. To successfully navigate these hurdles and unlock the benefits of Real-Time Customer

Data Platform (RTCDP) management, organizations need strategies for a successful RTCDP migration that lead to a better user experience and customer satisfaction in today's data-driven society.

Purpose Statement

The objective of this paper is to investigate the best strategies business leaders can use when transitioning from an architectural system to a real-time customer data platform, and to examine the challenges and strategies for a successful transition. By adopting an insight-oriented approach that involves Information Technology (IT) managers, experienced operational teams, and customer service representatives, the article seeks to explore insights that may be productive in moving to a new and better management system. This study will also explore successful business strategies for transitioning to real-time customer data platforms, which, in turn, should improve customer satisfaction and operational efficiency. By understanding the benefits of implementing a Real-Time Customer Data Platform (RTCDP) management system, business managers can foster a culture of continuous improvement and innovation, increasing success.

III. RESEARCH AND INTERVIEW QUESTIONS

- Research question: What strategies do business managers use to implement customer data management platforms in real-time?
- Interview questions: (a) What was your experience with dealing with online data management? (b) What strategies did you use to prepare your transition from your previous customer data management to real-time customer data platforms? (c) Which method did you find worked best for migrating management from the old system to the new system? (d) How do you determine whether your strategies used to migrate to a new customer data management platform are effective? (e) What makes dealing with new technologies challenging for businesses? (f) What, if anything, would you do differently if you were faced with a new innovative situation? (g) What else could you add to assist others in learning more about real-time customer data management systems?

Theoretical Framework

This research adopts the Technology Acceptance Model (TAM), supported by diffusion of innovations theory, to investigate people's acceptance of a real-time customer data platform. The TAM relies on PU (Perceived Usefulness) and PEOU (Perceived Ease of Use) as predictors of the intention to use technology (Adams, 2003; Davis, 1989). In 1934, Schumpeter developed the theory of innovation and argued that the diffusion of innovations theory offers a way to understand user adoption behavior and how innovators work to facilitate broader organizational adoption (Schumpeter, 1934). This theory has been chosen because it offers a comprehensive basis for studying individuals and social dynamics of technology adoption in an organizational setting. Through such a fusion of views, the study can better explore what drives or limits the successful adoption of RTCDPs among customers and, accordingly, informs strategies to increase user satisfaction and engagement.

IV. LITERATURE REVIEW

The shift to Real-Time Customer Data Platforms (RTCDPs) is a technical and organizational journey that covers technology adoption and customer engagement strategies. To make sense of this complexity, we first consider the fundamental concept of user acceptance and how it relates to leveraging real-time data to achieve strategic business goals. These theoretical frameworks, or conceptual models, include the Technology Acceptance Model (TAM) and the innovations theory, which have been used to explain factors influencing user acceptance of RTCDPs. The study also explores how real-time data processing can drive business performance, the challenges businesses face as they evolve into a new way of working, and the role of leadership and corporate culture in the digital business transformation. Furthermore, the study examines communication strategies, customer experience, training, support mechanisms, and techniques for a successful, innovative transition. The objective of this review is to bridge the gap for organizations moving toward a real-time management system and to help managers achieve greater Return On Investment (ROI) from data efforts by synthesizing common findings.

Technology Acceptance Model

This paper extends the Technology Acceptance Model (TAM) to examine RTCDP acceptance. The TAM was developed by Davis (1989), who hypothesized that two primary concepts, perceived usefulness (PU) and perceived ease of use (PEOU), guide decisions to accept or reject a new technology. Perceived relative advantage is the extent to which an individual believes that the innovation will increase job performance and be easy to adopt. Conversely, perceived ease of use reflects how effortless a user believes using a given technology will be (Davis, 1989). Understanding these concepts is important because members' perceptions of RTCDPs can

directly affect user adoption behavior. Furthermore, addressing usability concerns and demonstrating the tangible benefits of these systems can significantly enhance user acceptance and engagement. The model also suggests that, as companies deploy RTCDPs, there is a need to manage user perceptions and experiences; by informing users of the system's value propositions, making the system beneficial, and ensuring a user-friendly interface, acceptance can be fostered.

The Technology Acceptance Model (TAM) was first developed by Davis (1989) and is grounded in the psychological Theory of Reasoned Action (TRA) by Fishbein and Ajzen (1975). According to the TRA, an individual's behavior is determined by behavioral intention, which, in turn, reflects attitudes toward the behavior and the subjective norms surrounding its performance. Ultimately, actions and motives are driven by attitudes and beliefs. TAM extends this model by positing that perceived ease of use and perceived usefulness predict users' attitudes, intentions to use, and actual use of a new technology. In addition, perceived ease of use is believed to affect perceived usefulness in a reciprocal relationship. This framework is also important for practitioners, as it helps them understand which factors contribute to greater acceptance of RTCDPs. Once organizations understand how perceived ease of use and usefulness affect user behavior, organizational training programs and communication strategies can be customized to address concerns, leading to a more positive experience with new system adoption.

The Diffusion of Innovations Theory

In addition to the Technology Acceptance Model (TAM), the diffusion of Innovations Theory, introduced by Schumpeter in 1934, is a useful theoretical concept that provides insights into users' acceptance of innovations by adding an organization-based perspective on technology implementation. McFarland et al. (2003) added that the TAM theorizes stages of acceptance, specifically leading from awareness and conviction to a decision, which offer guidance regarding factors influencing technology adoption. Kisim et al. (2025) noted that an important concept in innovation theory is the distinction between "innovators" and "early adopters," who are considered "change agents" who influence their peers to adopt or use new technology. Then, early adopters can play an instrumental role in demonstrating the value of Real-Time Customer Data Platforms (RTCDPs) through their enthusiastic adoption and attract other coworkers to get on board. Furthermore, by focusing, for instance, on the communication and feedback loops identified by this theory, organizations can share successes and pain points from the transition to drive adoption among all users.

The use of innovation theory also relies on customer demands and behaviors. Schumpeter also explained how internal and external customers are influenced or affected by media (Schumpeter, 1934). The theory also explains how technology should align with customers' needs, how the technology acceptance model should be applied, and the concept of innovation. Organizational managers should also drive user adoption of real-time customer data platforms and support transition planning at all levels of the organization. Since Real-Time Customer Data Platforms (RTCDPs) may encounter resistance, identifying opinion leaders within the organization can facilitate acceptance and peer-to-peer influence, making innovation easier. Furthermore, by customizing messages, for example, to fit all adopter categories, information such as customer data can be matched to various needs and varying levels of readiness among all stakeholders in the organization. Using the technology acceptance model and innovation theory, this research seeks to explore strategies that influence the decision-making process for implementing real-time customer data platforms, which are helpful for firms' transition planning.

Importance of Real-Time Data Management

The business value of the real-time data management process is increasingly evident in today's rapidly digitizing world. Organizations that use real-time data control or monitoring can make quicker, better-informed decisions and respond swiftly to market trends and consumer preferences (Qureshi, 2025). Almondo (2025) argued that real-time evaluation enables organizations to monitor customer interactions and online behavior, including website visits and other activities, to identify emerging industry trends. These insights give businesses a competitive edge, allowing them to take a proactive rather than a reactive approach. Furthermore, Ridwan (2025) added that enabling an analytical approach to real-time data management enables direct interactions with customers. These real-time interactions will allow, for example, business offers to be updated dynamically for specific customers, thereby improving customer satisfaction. Empowering real-time data management will make the work environment more data-driven, enable faster decisions through real-time analytics, enhance operational efficiency, support team innovation, and help them stay ahead in the market.

In addition, as personalization and customer-centricity grow in many organizations, there is a need for real-time data to oversee and shape user experiences. Today, customers expect brands to respond instantly across many touchpoints in their purchasing journey. Klaviyo (2025) reported that 74% of consumers prioritize brand or personalized products when shopping for their own satisfaction. In a world with instant open access to information, companies can target offers, promotions, and messages to improve customer satisfaction and

relationships. Also, prompt business insights allow companies to optimize their marketing and customer satisfaction strategies. This tailored approach also encourages engagement with companies and builds customer goodwill, leading to more purchases. Moreover, real-time data management can make the difference between getting it right and falling behind in an increasingly competitive field.

Challenges in Transitioning to Real-Time Customer Data Platforms

The shift toward Real-Time Customer Data Platforms (RTCDPs) is not without challenges. Organizations seeking to provide real-time customer insights need strategies to address several issues and ensure they work for both internal and external customers. Qureshi (2025) argued that the biggest challenge in data management is connecting real-time data systems to existing technology infrastructure. Most of the industry lacks appropriate technology infrastructure or real-time analytics tools due to budget constraints, resulting in significant integration challenges (Luamba, 2019). Almondo (2025) argued that working with legacy technology, which is often outdated, can be costly due to higher operating costs, slower processing times, and the cost of upgrading or replacing systems. In addition, the volume and variety of organizational data from different channels, such as customer conversation logs, social media, and transaction history, may overwhelm existing systems. Strong data management practices are required to ensure data integrity, quality, and security. Without scalable tools to match the volume and complexity of business data in real-time, organizations risk system inefficiencies that could undermine customer experience and operational efficiency.

Aside from technological resistance, companies may face cultural and operational challenges when transitioning to RTPDs. Transition may be challenging as employees may feel threatened by new technologies and processes, especially if they were not adequately trained (Amemasor et al., 2025). Fear of change or a lack of control over real-time data management can be challenging factors for any organization. In addition, poor communication about the shift's purpose and benefits can create fear and rumors among staff, leading to low morale and decreased productivity. The segregation of the company's data can also hinder collaboration between departments and slow the implementation of a unified data strategy. In the face of these challenges, businesses need to embrace change management activities such as open communication, stakeholder involvement, and intensive training. Firms can also minimize pushbacks and prepare their organizations for a successful transition to real-time customer data platforms by fostering a culture of inclusivity and empowerment.

Leadership and Organizational Culture

The key to the successful use of Real-Time Customer Data Platforms (RTCDPs) is leadership that fosters a culture that actively embraces change and new ideas. The most outstanding leaders not only demonstrate but also model the value of agility and adaptability. Ogbuefi et al. (2024) stated that transformational leadership styles are instrumental in situations where workers are likely to communicate, work as a team, and share a common vision. Managers who communicate with their teams can foster a sense of ownership and responsibility, which is particularly important when deploying new technology. Leaders, by articulating a vision for RTCDPs, can improve customer engagement and operational efficiency, motivate teams to accept change, and work together toward common goals. In addition, for leaders to make effective change, they need to be aware of the impacts of the transition, respond to obstacles and questions, and have the energy to promote progress.

Organizational culture significantly shapes how employees interpret and respond to RTCDP innovations. A progressive organization that fosters innovation enables employees to adopt and accept new system changes in their day-to-day operations. Amemasor et al. (2025) argued that cultivating a positive environment that encourages feedback allows groups to report and solve problems and recommend changes. On the other hand, a bureaucratic organizational culture can lead to resistance to change; for example, employees may be uncomfortable altering established procedures. Hossain et al. (2024) added that empowering cross-functional teams to drive the RTCDP implementation not only fosters collaboration but also provides new perspectives on data usage. Team members must be motivated to work more closely with the company's data to better understand customer needs.

Communication Strategies

Effective communication is fundamental to transitioning to Real-Time Customer Data Platforms (RTCDPs). For instance, communication regarding any new project or idea should be clear and align with the organization's goals to avoid misinterpretation among stakeholders. Qureshi (2025) argued that effective communication should be clear, transparent, and consistent to avoid confusion among staff and consumers, and to build confidence among stakeholders. Regular communication from management can convey the progress of the transition, clarify expectations for the new system, and highlight its benefits (Chagadama et al., 2023). By articulating the forces behind the change, potential impediments, and what the process will entail, organizations can foster a shared understanding of how the transition will unfold. Moreover, using multiple communication

channels, including emails, team meetings, newsletters, and bespoke intranet pages, caters to different preferences while ensuring that important information is disseminated promptly to all relevant people.

Aside from informing staff of the change, open communication is essential for addressing concerns and gathering feedback. Creating forums or check-ins that allow workers to voice opinions, raise concerns, and share experiences can facilitate two-way communication, which may lead to higher engagement and acceptance of the RTCDP (Hossain et al., 2024). Furthermore, seeking feedback from staff during implementation can help identify problems early, enabling adjustments in a more realistic setting that reflects user experiences (Luamba et al., 2021). Luamba et al. (2023) argued that employers should take proactive steps during the change management process and be part of the transition to increase employees' motivation to adopt new technology fully. From an external standpoint, companies must continue to develop customer-centric language around the enhanced personalization and user-experience capabilities of RTCDPs. Talking to customers about the "whys" and how the new processes will improve their interactions or satisfaction builds trust and ensures their ideas are considered in the change process.

Enhancing Customer Experience

One of the key purposes of adopting real-time customer data platforms is to improve customer experience. Sharing real-time customer information enables services or divisions within an organization to be tailored to each user's preferences, ultimately satisfying them (Amemasor et al., 2025; Chagadama et al., 2022; Modupe et al., 2024). However, it is worth bearing in mind the pitfalls of real-time systems during migration. Ridwan (2025) claimed that customer confidence can be lost when privacy issues and service disruptions arise during the transition. Companies need to be proactive in implementing these measures through rigorous oversight and open communication about data handling.

There is nothing more essential to the development of a customer data platform than customer experience. Demand-driven commercial use of these platforms aims to better engage customers by serving them more personally and/or promptly. Several studies also underscore the importance of real-time data platforms in customer experience, as they enable businesses to gain a comprehensive understanding of customers' wants and respond almost in real time (Hossain et al., 2024; Chagadama et al., 2023; Luamba et al., 2023)—for instance, the move to real-time data platforms for customer experience. The immediacy and relevance of the contact also affect customer satisfaction and loyalty, as customers appear to prefer personalized, efficient interactions (Ogbuefi et al., 2024). As explained above, securing a competitive advantage through customer experience offers several business benefits.

Several considerations are important when moving from static to real-time systems. For a mobile contact-tracing app to be successful, data privacy concerns, service disruptions during implementation, and ongoing maintenance challenges threaten the delivery of seamless services (Davies & Lee, 2020). Ogbuefi et al. (2024) argued that firms will need to proactively address these challenges and establish strategies to sustain the new platforms. Firms' managers should also assess whether the organization's infrastructure, including human capital skills and potential technological capabilities, is already prepared for this transition. By adopting a more holistic approach that integrates technology and people, companies can enhance customer experience and drive tangible business value from a real-time data platform (Modupe et al., 2024). This approach creates a more dynamic end-user experience and drives customer interaction, influencing how much customers retain.

Training and Support Mechanisms

For Real-Time Customer Data Platforms (RTCDPs) to be utilized effectively, training and coaching are critical to the successful adoption of change. Proper teaching and training equip employees with confidence, experience, and capability to use the new system effectively. Almondo (2025) argued that promoting, for instance, training may include introductory workshops and e-learning for a variety of employees. Amemasor et al. (2025) and Chagadama et al. (2022) added that training employees to apply the new approach in their day-to-day work provides the "why" behind the changes or improvements and psychologically prepares them to embrace changes. Additionally, companies should plan follow-up training and coaching sessions to continue the learning experience and address pain points as people become more engaged with the new platform. In addition, businesses should schedule follow-up training and coaching sessions to sustain the learning process and mitigate significant pain points as users become more active on the new platform. A structured feedback process should also be in place to evaluate training and pinpoint additional user persona aptitudes, ensuring a constant evolution of the learning curve.

Strong, supportive structures for the transition process must also be a prominent feature, fostering an atmosphere of continuous learning and problem-solving. Chagadama et al. (2023) stated that establishing a dedicated support team or help desk can be significant for providing employees with quick assistance with the new system. Also, the customer support system should be readily available and include several communication options, e.g., phone, email, or chat, to handle customer-sensitive information in real time. Moreover, employees

are encouraged to use online tools to share experiences, ask questions, and offer feedback, thereby promoting teamwork and unity in the organization (Molosiwa, 2024). Such channels not only give employees a voice to ask for help but also increase peer-to-peer learning and knowledge transfer. This, in turn, will promote confidence among new system users and increase the likelihood that the customer data platforms execution project will be smooth from deployment through post-deployment.

Techniques for Successful Transition

Successfully transitioning to Real-Time Customer Data Platforms (RTCDPs) requires developing a plan that addresses challenges and enhances the user experience. Hossain et al. (2024) argued that a key functional step is to create a roadmap for change. This plan must specify how it will be implemented, who will do what, and which Key Performance Indicators (KPIs) will be used to measure progress toward goals. This can help organizations make it clear to team members what needs to be achieved during transitions and allocate resources accordingly, so that business continues as usual and productivity levels stay the same. Adding regular reviews, including feedback, to periodically revisit and amend the plan as required, will also add value. In addition, developing feedback-based, regular review schedules may provide opportunities to revisit and adjust the plan over time as needed, enhancing value throughout the implementation journey (Chagadama et al., 2023). This iterative process promotes adaptability and incremental improvement, leading to a more successful setup of RTCDPs.

An alternative approach is to pilot the Real-Time Customer Data Platforms (RTCDPs) before their full implementation. Pilots are selected to troubleshoot potential issues early and provide helpful feedback (Qureshi, 2025). This not only allows us to refine the system using real-world data but also builds user trust in the platform by showing improvements from their input. It also provides focused pilot-group training and support, which, in subsequent project phases, serves as a model. Through pilot testing, we can identify and resolve any unanticipated challenges that arise during the widespread release before they affect the broader organization community. On the other hand, successful pilots can create enthusiasm and commitment among stakeholders as they experience the benefits of a new system of work, thereby promoting institutional adoption across campuses.

Robust training and support systems for employees are needed to ensure a successful transition. One of those approaches is the training and retraining process, which should be systematized and flexible to meet the challenges of the new system (Clause et al., 2024). Kim and Park (2023) argued that providing different options (i.e., workshops, online resources, one-on-one interference in the new system. Provide ongoing support structures, such as internal and external customers, that other team members can rely on when they find themselves in a pickle, during or after migration. Structured planning, pilot testing, and education will help organizations make the shift to RTCDPs effectively, while leveraging the associated real-time data benefits and reducing uncertainty and pushback during the transition.

V. METHODOLOGY AND DESIGN

The research uses a qualitative single-case study design. This approach allows researchers to investigate the phenomenon more from the perspective of individuals who lived the experience (Qaissi, 2024). Per Qaissi (2024), the single-case methodology provides a more in-depth, context-rich understanding of the specific contexts surrounding the implementation process within each organization. By focusing on a single site, the study can explore micro-level processes and reflect on insights that are sometimes overlooked in macro-level, data-oriented quantitative studies. This qualitative method provides additional insight into how organizations are overcoming barriers to adopting new technologies and which specific areas are most influential in their success or failure. Using qualitative data allows researchers to gain an in-depth understanding of why a user may make or fail to make confident choices, as success is assumed when providing yes/no answers (Qaissi, 2024). This may be especially important when trying to understand the technology acceptance paradox, as it highlights organizational factors such as culture, user training, and support systems that can enable successful change initiatives. Finally, this methodology enables a deeper analysis of strategies that may facilitate user engagement and adoption in real-world RTCDPs.

Participant Selection

The study uses purposive sampling to select participants from different industries that operate real-time customer data platforms. The participants include a wide range of stakeholders, such as IT managers, user-experience teams, customer service representatives, and others directly involved in or affected by the rollout. This method aims to capture diverse perspectives, since the experiences and problems encountered along the road to RTCDPs are not homogeneous. Including participants with diverse views is a good qualitative evidence practice, as it provides depth and richness to findings (Qaissi, 2024). By including diverse perspectives, the research seeks to capture a more comprehensive picture of what happens during implementation and to extract knowledge to identify best practices for successful transitions in similar settings. In addition, diverse source

material helps identify commonalities and differences in challenges and solutions, thereby increasing the relevance of findings. This not only enhances the data but also generalizes findings to a broader range of settings and organizational contexts. Further, engaging a variety of participants may surface new solutions and techniques that do not emerge in a more homogeneous group, and could stimulate creativity in addressing RTCDP implementation challenges.

Data Collection

Data are collected through semi-structured interviews with key informants from 12 companies in the DMV (District of Columbia, Maryland, and Virginia) area who have experienced the phenomenon. The 30-minute interviews with each participant helped us elicit perceptions, experiences, and reflections as the move toward RTCDPs develops in a low-key environment. Semi-structured interviews allowed us to explore various concepts while providing a framework for comparing responses from all twelve participants. From these interviews, we learned about the kinds of problems companies have faced while migrating from one operational model to another, how they managed them technically, and how they monitored the impact on business models, customer service, and related areas. Ethical issues are addressed throughout the research process, and informed consent is obtained from all participants, with an explanation of how and why their data will be used. Anonymity, on the other hand, protects participants' identities and sensitive details, increasing trust between the researcher and participant and the credibility of the research. Additionally, other sources, such as public information and companies' internal reports, were also collected ethically to get more information about the impacts of customer data protection. Above all, the methodology inherent in this method protects both respondents and the quality of the information collected because people are more likely to respond honestly and in detail when they believe their anonymity is secure.

Data Analysis

Interview data were analyzed thematically. Themes were also identified, analyzed, organized, and interpreted from qualitative material. The thematic code demonstrated one way to reduce complex qualitative data into themes that are easily understood and capture different elements of the transition experience. Analysis proceeded in several steps; the first step was becoming familiar with the data through successive readings and notes. After that, the data set, initial codes were generated for aspects of the texts relevant to answering the research questions. The codes were later grouped to identify themes that emerged across the interviews. This kind of analysis is important for understanding the complexity of the user experience during transition. It offers actionable results for future organizations considering transitioning to affinity cards. By shedding light on recurring challenges, best practices for success, and users' perceptions, the results are expected to enrich understanding of effective RTCDP implementation and serve as valuable support for companies seeking to improve their data management capabilities and customer engagement strategy.

VI. RESULTS

Preliminary results presented indicate a positive effect of Real-Time Customer Data Platforms (RTCDPs) on user experience, based on the improved engagement and satisfaction that organizations reported when effective implementation strategies were enacted. The review identified five themes that emerged as important for successful transitions: (a) Whole System Planning, (b) Stakeholder Involvement, (c) Training Programs, (d) Data Governance and Privacy, and (e) Piloting. These themes highlight the key issues organizations must address to overcome the challenges of moving to RTCDPs.

1. Holistic Planning: The success of organizational change is highly dependent on comprehensive planning, as noted by participants P3, P6, P9, and P11 in this qualitative research study. All participants agreed that a comprehensive plan is imperative as an indicator of progress and that it requires periodic cross-checking during the transition. Amid shifting priorities toward actions that drive better customer engagement and satisfaction, Real-Time Customer Data Platforms (RTCDPs) are a key trend for organizations. Hossain et al. (2024) asserted that organizations can strategically balance resources and expectations before, during, and after new changes. For instance, P2 supported this view, commenting, "We would have been in that chaos if we did not have a plan," emphasizing the importance of an organized strategy. P10 supported this statement, saying, "We would have been lost in chaos without a plan," underscoring the need for a structured approach. All participants stated that a thorough overall plan creates shared expectations, which is key to mutual understanding among colleagues and to handling conflicts or crises that may arise during transitions. This aligns with TAM, which emphasizes that employees are encouraged to increase technology adoption for RTCDPs and improve the experience for all company users.

2. Stakeholder Engagement: Engaging stakeholders during the transition is critical to building a supportive environment that facilitates change implementation. P12 stated, "With regular updates and open communication, expressing our concerns and sharing our ideas for things that could be done better, in real time." This sentiment aligns with Chagadama et al. (2023) 's conclusion that advocates transparent communication and inclusive participation to reduce uncertainty and build confidence among organizational team members. P1 added that, "We were encouraged to share our opinions and concerns in the meetings or any time when visiting the projects." P2, P3, P7, P8, P10, and P12 chimed in, reiterating that when employees' feedback and suggestions are accepted and acted on, it makes them feel appreciated, which significantly increases buy-in to the project. All participants agreed that fostering employee participation in transition discussions promoted greater ownership and teamwork, resulting in a more integrated transition experience. For all participants, stakeholder engagement aligns with innovations theory, which recommends early stakeholder involvement to stimulate broader organizational acceptance. Bringing in stakeholders not only facilitated early identification of potential obstacles but also ensured that a variety of perspectives were considered in the decision-making process**.**

3. Training Programs: Extensive training is essential for securing buy-in and ensuring the successful implementation of the new system. P7 stated, "As the user of the newly implemented system, extensive training sessions before and after rollout made me feel comfortable with using the new platform". All participants recognized that support was essential to implementing the system. This aligns with Shuvo et al.'s (2025) conclusion, arguing that customized training promotes employees' confidence in adopting new technology, leading to higher performance. 10 participants attested that they enjoyed hands-on workshops, particularly appreciated getting on the system before it went live, so they were not going in blind. Furthermore, all participants agreed that it was helpful to continue receiving support after the initial training to address lingering questions and ensure everyone felt prepared. Ongoing support after the initial sessions is incredibly beneficial and helps answer any lingering questions, ensuring everyone is fully on board with the new systems. All participants also attested to the importance of experiential learning in building confidence and competence, which aligns with TAM's emphasis on perceived ease of use as a predictor of technology acceptance**.**

4. Data Governance and Privacy: It was clear from the discussion and all participants' feedback that a strong data governance and privacy regime is essential to building customer trust. Ten of the twelve participants stated that customers feel more at ease knowing their content is secure, which has led them to use new technology tools more. This aligns with Rahman's (2025) findings, which emphasize the importance of strong data management in enhancing customer relations and building brand loyalty. For example, P6 said, "Ensuring that we are transparent in how we are utilizing their data is critical; as the customers become more aware, their comfort level with this increases dramatically." P10 commented, "Frequent audits and consistent communication about how we are managing data have helped alleviate concerns that our clients feel about using the platform; they are getting more comfortable with it." All participants agreed that ongoing customer feedback on data policies indicates that businesses that prioritize transparency and regular compliance audits are building stronger relationships with their clients. This finding illustrates the role of trust in fostering employee and customer adoption of new data-driven technologies. The data governance perspective is also aligned with the Technology Acceptance Model (TAM), which promotes users' intention to adopt new technological solutions.

5. Pilot Programs: The final theme from the analysis of the collected data was that developing and using pilot programs were effective ways to refine the RTCDP features before system-wide implementation. 10 participants attested that piloting with the sample subset helped identify pain points early and enabled refinement of all existing systems. This aligns with the ideas of Amemasor et al. (2025) and Celestin et al. (2025), supporting experimental testing with fewer users to mitigate risk while still striving for user satisfaction. All participants agreed that it was an essential step to the success of the transition to real-time customer data platforms. P12 stated, "We felt our feedback was being integrated, and this helped us realize that we made an impact on the system and increased self-assurance." P5 also wrote, "With the pilot, we were able to have some opportunity to iterate from real usage and feedback before fully launching, and that was gold." One concept that directly relates to this is the innovations theory, which suggests deploying early adopters to foster broader organizational uptake of new technologies. By collecting user feedback and making system changes based on real-time insights, the company will improve system performance, leading to higher user satisfaction and overall performance. These results support the theoretical discussions in the literature review, which show that user participation and management proactivity play a vital role in predicting successful technology adoption and implementation in organizations.

Future Research Directions

Future research could examine the long-term effects of real-time moves off a customer data platform on organizational culture and employee morale. Moreover, cross-sector comparisons can inform sector-specific efforts and challenges (for example, hardware and software penetration in the market) in implementing real-time

data systems. It would also be interesting for researchers to explore how adopting next-generation technologies such as AI (Artificial Intelligence) and ML (Machine Learning) may enhance the performance and usability of current-generation Real-Time Customer Data Platforms (RTCDPs). Furthermore, exploring the effects of real-time data on decision-making throughout different levels within organizations might shed light on its effectiveness as a digital practice. Finally, studying how user training and support mechanisms evolve with technological development could add to knowledge of implementing new strategies.

VII. CONCLUSION

Given the complexities of innovation, organizations need to take action to transition to Real-Time Customer Data Platforms (RTCDPs). This study is intended to provide best practices and tips for businesses as they prepare to make this vital switch. To minimize resistance and enable employees to accept new technology, organizations needed to create an appropriate communication environment, provide adequate training, and implement effective communication practices throughout project performance. Moreover, companies can earn customer trust, build stronger relationships, and improve the utilization of their data assets by implementing robust data governance practices. The goal of this research was to identify the best strategies for successful migration to real-time customer data platforms, leading to a better user experience and higher customer satisfaction in today's data-driven society.

The move to Real-Time Customer Data Platforms (RTCDPs) presents companies with significant opportunities to improve employees' or users' experience and increase customer engagement. These results underscore the need for effective strategies, including integrated planning, stakeholder involvement, extensive training, strict data governance, and pilot programs. To safeguard a smooth transition, companies need to prepare with a well-defined transition plan that outlines clear stages and responsibilities, engage stakeholders early through mandatory updates and open forums, invest in targeted training programs to empower staff, implement robust data governance mechanisms to win customers' confidence as they share their data for new technologies such as AI, and pilot test with several target user groups before full-scale implementation. By following these steps, companies can overcome the challenges of RTCDPs, strengthen their data management, and elevate their client relationships, which play a vital role in the long run for companies operating in such competitive markets.

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