



The Customer Zero playbook

how we consolidated
platforms to spend less
and achieve more

Simplify first. Automate. Then scale with AI.



Executive summary_

“Digital transformation is talked about so often these days that it has almost lost all meaning. But, when done right, we’ve seen first-hand the business impact it can deliver.

When we talk about becoming a Customer Zero, specifically on Microsoft technology, this wasn’t about proving a point or being early adopters for the sake of it. It was about fixing some very real challenges in our own business and holding ourselves to the same standards we expect of our clients.

Like many organisations that have grown over time, we’d built up a complicated estate: multiple systems, overlapping tools and data spread in too many places. It worked, but it didn’t work well enough. It slowed decisions, created friction for our teams and made it harder to scale without throwing more people or cost at the problem. We knew that if we wanted to grow sustainably - and if we wanted to take AI seriously rather than superficially - we had to get the foundations right first.

That meant committing to a single Microsoft platform, making some tough decisions around simplification and accepting that not every change would feel transformational on day one. It also meant asking a lot of our people: learning new systems, cleaning up data and sticking with the long term vision even when the immediate benefits weren’t obvious. What made the difference was treating this as a business programme, not an IT project, and staying focused on outcomes rather than features.

The impact has been significant. We’ve delivered **strong revenue growth** without increasing headcount, saved over **£1 million a year** through better operations and created the conditions where **AI and automation genuinely add value** instead of introducing risk or noise. Just as importantly, we’ve learned first hand what works, what doesn’t and what other organisations should avoid.



This eBook reflects that journey. It’s not a blueprint you can copy line by line, but it is an honest account of how we approached planning, execution, adoption and ROI as our own Customer Zero. My hope is that it helps other leaders cut through the hype, focus on what really matters and make more confident decisions about how they modernise their own organisations.”

- Rob Young, CEO of Infinity Group

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The problem we were solving_

Our journey to Customer Zero started with a clear underlying challenge: creating a business that could scale efficiently, make better decisions and operate with less friction as it continued to grow.

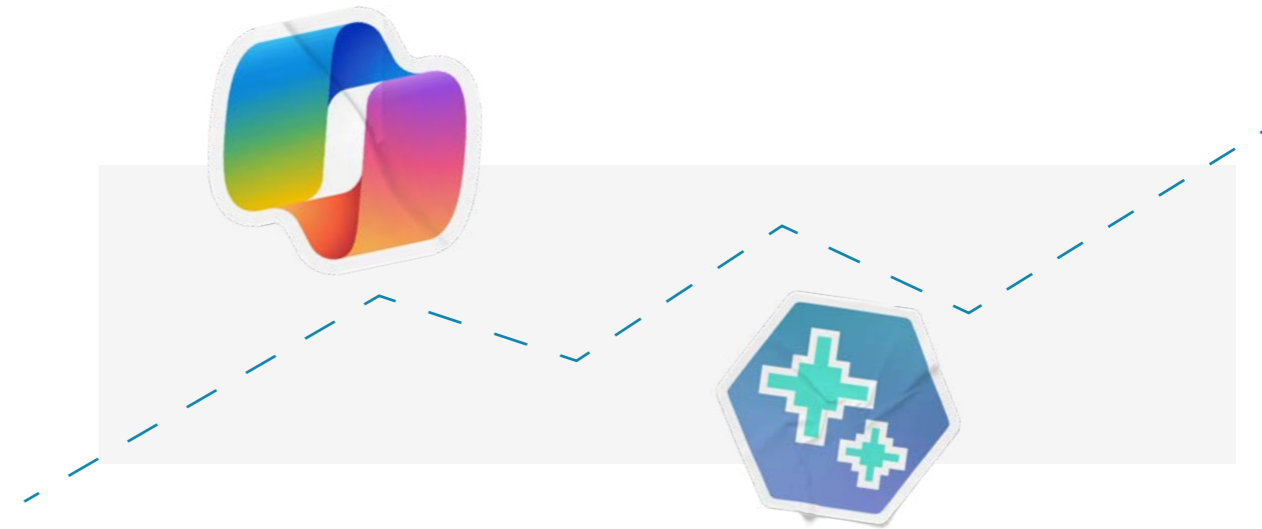
Over a 25 year period, Infinity Group had evolved through changing customer needs, new services and incremental technology decisions. This resulted in multiple systems, suppliers, licences and disconnected datasets.

While each decision made sense at the time, the long-term effect was increasing cost, operational complexity and risk.

These challenges didn't present themselves as a single technical issue. Instead, they showed up in everyday ways across the organisation.

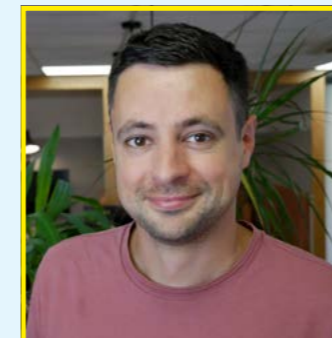
The pains we needed to address

- Tools and data spread across too many places, leading to increased manual factfinding
- Duplication, workarounds and hand-offs across core processes
- Slow, inconsistent, backward-looking reporting and decision-making
- Difficulty standardising services, leading to inconsistency
- Scaling required more headcount/cost



The growing interest in AI created an important inflection point. AI promised efficiency and insight, but the existing operating model would have made it difficult to realise those benefits. Poor data quality, fragmented processes and inconsistent context would have been exposed and potentially amplified by it.

This made it clear that the real priority was not introducing new capability, but reducing underlying complexity. Before automation or AI could add value, the business needed a more coherent platform, a stronger data foundation and clearer ways of working. Addressing these fundamentals would make it easier to operate day to day, while also creating the conditions for more advanced capabilities to be applied safely and meaningfully.



“The more moving parts you have, the more complexity and risk you introduce. Consolidating onto a single platform takes a lot of that away.”

– Tristan Shortland,
Chief Technology Officer at Infinity Group

The strategic decision: choosing a platform over point solutions_

With the underlying problem clearly defined, the next step of our transformation was a strategic architectural choice. Rather than attempting to optimise individual areas of the business through multiple specialist tools, we made a conscious decision to prioritise platform consolidation over a fragmented ‘best of breed’ approach.

We had already experienced the impact of an accumulated mix of systems, each solving a specific problem but with limited integration. While this offered flexibility in the short term, it increasingly introduced complexity as the business grew – including poor data consistency, increasing licensing costs and governance and security controls that had to be managed across multiple environments.

The decision to move towards a more centralised Microsoft platform was driven by a desire to reduce that complexity at its root. Fewer core systems meant fewer moving parts, lower integration risk and a simpler operational landscape to manage.

“Standardising on a single platform meant making some uncomfortable decisions. In the short term, not every choice felt like an upgrade, but in the long term it gave us something far more valuable: clarity and control.”

– Rob Young, CEO

Why we choose Microsoft

- **We had to live it first:** As a Microsoft partner, choosing Microsoft allowed us to run our own business on the same platform we recommend to clients - giving us lived experience of where it works brilliantly, where it needs care and where customers genuinely feel pain.
- **Built to scale, not sprawl:** Microsoft gave us a platform that could grow with the business without constant re architecture, bolt ons or supplier sprawl - critical as complexity increases with scale.
- **Continuous improvement, not big resets:** Twice yearly release waves meant new capability was delivered into the platform over time, reducing reliance on disruptive re platforming programmes.
- **Security by default:** Identity, compliance and security are embedded across the ecosystem, not bolted on, giving us confidence as automation and AI became more prominent.
- **AI where work actually happens:** Microsoft integrates AI directly into the tools our teams already use, drawing on existing data and controls rather than bypassing them or creating new risk.



In short: a platform approach created the conditions for more reliable reporting, more consistent processes and more effective automation and AI.

The result was an integrated tech stack, built on Microsoft technology and tailored to our unique business needs, while still offering the integration we needed to scale.

The tools behind the execution_

- **Dynamics 365** (Sales, Customer Service, Project Operations): A shared operational backbone connecting sales activity, service delivery and project execution.
- **Dynamics 365 Business Central**: Centralised finance, billing and recurring revenue operations, improving visibility and reducing manual effort.
- **Microsoft 365 and Teams**: The primary user interface for day to day work, with collaboration closely integrated into CRM, service and project workflows.
- **Microsoft Fabric and Power BI**: A unified analytics layer built on shared, verified datasets to support leadership reporting, forecasting and decision making.
- **Power Platform** (Power Automate, Power Apps): Low code automation and integration to remove friction from recurring processes and connect systems without custom development.
- **Microsoft security and identity** (Entra ID, Purview, Defender): Built in identity, data protection and governance controls embedded across the platform from the outset.



Together, these tools supported the execution approach described: incremental rollout, clearer data ownership, faster feedback loops and the ability to scale without reintroducing complexity.

How we executed the transformation_

Delivering a transformation of this scale required more than the right technology. It demanded a delivery approach that allowed the business to continue operating day to day, while progressively replacing complexity with something more resilient.

Rather than attempting a single large scale change, execution followed a deliberately sequenced roadmap. The aim was to build strong foundations first, unlock value in stages and reduce risk by adjusting as the programme evolved. Each phase was informed by a clear view of the intended end state, rather than treating individual system changes as standalone projects.

1. Defining the target operating model first_

Execution began by agreeing what the future business needed to look like once the programme was complete. This went beyond tool selection and focused on how teams should work together, how information should move across the organisation, and what 'good' looked like in day to day operations.

Taking an enterprise wide view helped avoid solving isolated problems in isolation. CRM, ERP, service management, delivery and reporting were designed as parts of a single operating model, rather than separate workstreams with local optimisation goals. This shared reference point guided decisions throughout the programme and ensured short term actions supported the longer term vision instead of undermining it.



2. Prioritising departments by value and fit_

With the target model defined, we sequenced execution based on impact and feasibility. Areas with larger user groups were prioritised, as they offered the greatest opportunity to realise benefits from system consolidation, data centralisation and reduced duplication early.

Within those areas, change was further staged by complexity. Teams and processes that aligned closely with standard platform capability were addressed earlier, allowing confidence and internal capability to build quickly. More bespoke or operationally complex areas were intentionally scheduled later, once the platform foundation was stable and lessons from earlier phases could be applied.

This approach helped build momentum through visible progress, keeping teams motivated rather than consuming energy on the hardest problems before the organisation was ready to absorb them.



3. Moving in stages rather than all at once_

Migration was carried out incrementally. Each phase was planned to create space to gather feedback, refine ways of working and improve adoption before moving on to the next.

This sometimes meant accepting changes that did not immediately feel transformative. Some teams moved from one tool to another that appeared similar at first glance. These sideways moves were a conscious part of the strategy: while the immediate experience felt familiar, connecting those tools into a wider, integrated platform would unlock longer term value through shared data, automation and insight.

Over time, those connections delivered benefits that would not have been achievable through isolated systems – and that's where the ROI lived.



4. Using migration to improve data discipline_

Data migration proved to be one of the most demanding aspects of execution, but also one of the most valuable. Moving systems forced us to make explicit decisions about the role data should play in the future.

Rather than migrating everything by default, teams agreed what data genuinely mattered. This meant distinguishing between information required for legal or regulatory reasons, data that would support future analytics and decision making and content that no longer added value. These choices turned data hygiene from a technical clean up exercise into a business conversation about relevance, risk and usability.

By treating migration as a strategic opportunity instead of a technical hurdle, the programme strengthened data foundations and reduced the risk of simply carrying old complexity into a new environment.



Winning hearts and minds: the human side of change_

Our platform of choice was obviously a core driver for our Customer Zero journey. But we also knew sustained adoption depended on how people experienced the change day to day. Replatforming was a multi year change programme that required consistent communication, hands on enablement and time for new ways of working to settle. This made it a human project as much as a technical one.

Platform change proved more demanding than replacing individual tools or features. In many cases, early user experiences felt familiar rather than transformative. Some core activities were performed in similar ways to before, and the benefits of consolidation (better data, automation and insight) were not always immediately visible at an individual level. This made it critical to continually reconnect everyday changes with the broader aims of simplification, shared data and long term scalability.

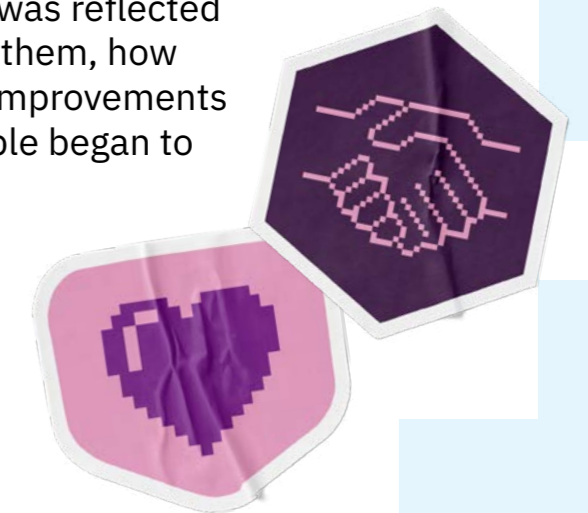
During delivery, teams were asked to contribute beyond normal business as usual. This included hands on involvement in user testing, data validation, process redesign and training, often alongside existing workloads. To sustain progress, leadership had to play an active role: reinforcing why the programme mattered, setting realistic expectations about short term disruption and visibly recognising the effort being invested across the business. Adoption and learning were treated as outcomes in their own right.

“This was never an IT programme. It was a business decision about how we wanted to operate, scale and compete - and that meant leadership had to be visibly involved, not just supportive.”

– Rob Young, CEO

Enablement didn't stop at go live. As new systems became embedded in everyday operations, it became clear how quickly confidence could dip and old habits could re emerge without reinforcement. Ongoing support took practical forms: refresher sessions, simple guidance on improved workflows and examples of how teams were using the platform more effectively in real situations. Small but tangible improvements (such as a single joined up customer view, a faster management report or the removal of a recurring manual task) often had more impact on adoption than broader messaging about future benefits.

Viewing it as a business project, not just an IT one, influenced how success was measured and discussed. Rather than treating adoption as a separate workstream, it became inseparable from delivery itself. Progress was reflected not just in systems going live, but in how confidently people used them, how consistently data was trusted and how often teams experienced improvements in their own work. The transformation truly succeeded when people began to recognise the value of the change in practice.



What transformation looked like across the business_

While platform decisions and sequencing shaped the direction of the Customer Zero journey, the real impact became visible in how day to day work changed across the organisation. Looking at transformation through a departmental lens helps make the change tangible, showing how the same foundation supported very different needs across leadership, commercial teams, delivery, finance and operations.



Leadership: from hindsight to faster, better decisions

For senior leaders, one of the most significant shifts has been the move away from slow, static reporting. Previously, leadership packs were time consuming to produce and often reflected what had already happened rather than what was unfolding in real time.

By introducing Fabric and a unified reporting layer, sales, service and utilisation data can now be viewed through live dashboards built on shared, verified datasets. This consistency means different teams can ask the same questions and trust the answers they received.

As a result, decision making is more proactive. Instead of identifying performance issues weeks later, leaders gain earlier visibility and the ability to respond before small problems escalate.



“We’ve always been a business that leans into technology, but Customer Zero made that more deliberate. It’s not just about trying new tools; it’s about understanding how they actually improve how we operate and how we lead.”

– Lisa Herbert, Managing Director

Sales: from fragmented follow up to more informed selling

Sales teams benefit from having activity, communication and customer data better connected. Outlook and Teams interactions can now be tracked more consistently into CRM, reducing reliance on manual updates and freeing time for customer engagement.

AI enabled capability adds a further layer of support. Agent led analysis of Teams transcripts help surface risk signals or commercial insight that might be missed in live conversations. This allows sellers to focus on the client while the platform handles more of the capture, context and analysis work in the background.



“We’re capturing far more of what actually happens in customer conversations, and more importantly, we’re able to act on it. That makes our selling more informed and far less reactive.”

– Kevin Brown, Sales Director

Delivery and PMO: from inconsistency to earlier risk visibility

Delivery teams were among the earlier adopters, as their ways of working aligned relatively well with core Project Operations capability. This made it easier to introduce more structured processes without significantly disrupting existing practice.

Over time, automation and AI has helped improve quality and consistency. Risk signals are identified earlier, handovers are clearer and delivery documentation more reliable. In some areas, agents are used to review artefacts such as user stories, checking for completeness, clarity and adherence to best practice.

These tools reinforce standards without removing professional judgement, helping consultants focus on higher value work.



“What’s changed most is consistency. We’re identifying risks earlier, improving handovers, and producing more reliable outputs without adding overhead to the delivery teams.”

– Tracey Millings,
Head of Project Delivery

Finance: from manual effort to more scalable operations

Finance have seen clear operational gains as recurring billing for licences, support and security services are now centralised into Dynamics 365. This reduces manual handling, improves visibility and makes recurring revenue easier to manage at scale.

Integration with Partner Center simplifies the tracking of licence changes and pricing, reducing dependency on spreadsheets and manual reconciliation. Reporting cycles have shortened dramatically, with outputs that once took days available in under an hour.

The introduction of Business Central and related automation has also created ongoing opportunities to improve invoicing, payables and wider financial workflows.



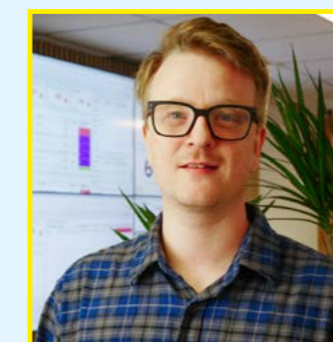
“What used to be manual tracking, reconciliation and back-and-forth is now fully integrated. Licensing, billing and customer access all sit in one place, which makes the whole process faster, simpler and much more transparent.”

– Rob Healy,
Recursive Billing Manager

Marketing: from broad messaging to sharper commercial focus

The transformation has extend beyond operations into go to market maturity. Marketing evolved from broad, feature led messaging towards clearer ideal customer profiles, outcome led positioning and more structured campaign execution.

Stronger data and integration support better segmentation, clearer measurement and a more diversified channel mix. This shift highlights that Customer Zero was not purely about internal efficiency; it also influences how the business positions itself, prioritises demand and aligns marketing activity more closely to sales and service outcomes.



“The biggest change for us has been moving from broad messaging to real commercial focus. We’re clearer on who we’re targeting, what we’re saying and how marketing directly contributes to revenue.”

– Chris Marshall,
Chief Marketing Officer

IT and security: from restriction to safer enablement

As automation and AI have become more prominent, the role of IT and security has become crucial for minimising risk. The focus moved to visibility, governance and safe experimentation, as people navigate increased innovation in their daily roles.

Capabilities such as Defender Cloud App Discovery provide insight into AI usage across the organisation, while Purview labels, security policies and structured change controls create guardrails around data access and system change. This makes it possible to move faster with confidence, supporting new ways of working while maintaining appropriate control.



“Our focus is making sure people can experiment with AI without creating unnecessary risk. We have tools to help us put the right guardrails in place, so people can work safely while keeping our data and processes protected.”

– Rory Molloy,
Head of Internal IT

Service and customer experience: from fragmented support to joined up service

Service teams have gained a more complete view of the customer by bringing together tickets, contracts, renewals, services and wider context in one place. This reduces friction in support interactions and improves consistency for both teams and customers.

The customer portal evolved alongside this foundation, becoming a more useful self service channel for services, licensing and, increasingly, finance related queries. This joined up view also creates the basis for future improvements, including more intelligent routing, self service and agent assisted support through Contact Centre capability.



“It’s not just faster, it’s more structured. Centralising the data has reshaped how we work as a team, making things both more efficient and more scalable.”

– Nathan Sheppard, Head of
Service Delivery

People and culture: from tool users to capability builders

Across the business, the platform approach has encouraged people to move beyond simply using tools to actively shaping how work was done. Some employees have naturally become automation or AI champions within their teams, combining deep domain knowledge with the new capabilities being introduced. Safe experimentation environments and centre of excellence oversight allows this to happen without creating duplication or risk.

Training, workshops and continuous enablement ensure that capability development remains a shared responsibility, embedded across functions rather than concentrated within a single technical team.



“A big part of this has been building new skills across the organisation. Through training, workshops and hands-on experience, people are developing the confidence to use automation and AI in their own roles.”

– Louise Otton, Head of Talent
Development and Culture

Incorporating AI into our transformation_

Why we didn't start with AI_

Although AI is a central theme in many transformation programmes, it wasn't our starting point. The work focused instead on simplifying systems, consolidating data and improving how the business operated day to day. As interest in AI accelerated, it became clear that the value of AI would be heavily influenced by what sat underneath it. Fragmented data, inconsistent processes and complex integrations would have constrained what AI could realistically achieve. Without a reliable foundation, automation and agents risked acting on poor information, reinforcing inefficiency rather than resolving it.

By bringing data, systems and processes into a single Microsoft estate first, we created a more stable environment for later experimentation. Customer, operational and financial data could be accessed with clearer context and stronger governance. Security, identity and compliance controls were already embedded, reducing the risk associated with introducing new capability at speed.

This meant that when AI and agent technologies became viable options, they could be introduced in a way that felt relevant and practical. Rather than asking where AI might fit, teams could assess where it would meaningfully improve existing workflows. In essence, AI became an accelerator of good foundations, not a substitute for them.

"We didn't start with agents. We started with getting our data, systems and processes right. That's what's allowed us to move faster with AI later on."

– *Tristan Shortland, CTO*

From experimentation to production: the AI execution model_

When AI and agents started to become a realistic part of our roadmap, the focus was deliberately on execution rather than experimentation. Early curiosity was channelled into a structured approach designed to turn promising ideas into measurable business value, while avoiding the common trap of isolated pilots that never scale.

The blueprint for AI adoption was grounded in a simple principle: agents should exist to improve real work, not to showcase technology.

1. Starting with the work, not the tool

We began by examining how work was carried out across the business. Teams looked closely at where time was spent, where effort was repetitive, where handovers introduced friction and where quality varied depending on who was involved.

Many of the strongest opportunities didn't begin as AI projects. They started as process or automation improvements, with AI later layered in to extend capability (for example, by adding analysis, reasoning or decision support). This ensured that agents were anchored in reality, addressing known constraints rather than hypothetical use cases.

2. Preferring first party capability where it fits

Where Microsoft's native AI and agent capabilities already addressed a need well, these were prioritised over custom development. First party options are typically faster to adopt, easier to govern and simpler to maintain, while remaining aligned to our wider platform roadmap.

This approach reduced technical debt and limited the risk of investing time and effort in solutions that would quickly become outdated.

3. Building custom only where it created differentiated value

Bespoke agents were reserved for areas where there was a clear gap between existing capability and genuine business need. In these cases, custom work was justified by its ability to extend the operating model.

One example involved analysing Teams meeting transcripts to identify delivery risks early and route them directly into downstream systems for action. This use case warranted custom development because it embedded intelligence into an existing workflow, closing a real gap rather than duplicating functionality available elsewhere.

This disciplined approach helped keep attention on outcomes, ensuring resources were invested where they could make a meaningful difference, and minimising complex issues later.

4. Creating safe, structured paths to experiment

We believe innovation is key to resilience. But, we ensured innovation was supported through controlled experimentation rather than unrestricted exploration. Developer environments, data loss prevention policies and centre of excellence oversight gave teams freedom to test ideas without introducing unnecessary risk, duplication or sprawl.

Promising concepts could then be reviewed against clear criteria (business impact, feasibility and risk) before being refined and prepared for wider rollout. This balance preserved trust in the platform while still encouraging initiative and creativity across teams.

5. Measuring before scaling

Not every agent that worked in a small context was suitable for broader deployment. Decisions to scale were based on observable impact: improvements in quality, speed, capacity or downstream business outcomes.

This emphasis on measurement prevented experimentation from becoming proliferation. It also reinforced a clear distinction between tools that were interesting and those that were genuinely valuable. Over time, this shifted AI from a set of isolated trials into a managed capability.

Through this execution led approach, agents were treated as products rather than demonstrations: designed with intent, governed appropriately and judged on the value they delivered to the business.

Measuring what matters: how we proved ROI_

Headline KPIs

- 60% revenue growth over 3 years, without increasing headcount
- £1m+ annual cost savings
- Time-to-output reduced by 90%+ in key workflows
- Improved operational capacity
- Faster decision cycles driven by trusted, visible data
- Greater forecasting confidence across sales pipeline, service demand and resource planning

From the outset, we recognised that focusing only on financial reduction would leave value on the table. Much of the benefit created came from improved capability, decision making and experience. So, we assessed ROI across multiple dimensions, reflecting how transformation was actually felt and used by the business.

“Growing the business by thirty five percent without increasing headcount fundamentally changed how we think about scale. It showed us that growth doesn’t have to mean more complexity – if the foundations are right.”

– Rob Young, CEO





Financial ROI_

Cost avoidance and operational savings are an important part of the value story. By consolidating systems, reducing duplication and automating recurring work, we've achieved over £1 million in savings and efficiencies.

These gains aren't driven by a single initiative, but by the cumulative effect of simplification, better data and more scalable processes. The emphasis was on removing structural inefficiency rather than cutting cost in isolation, which made the savings more sustainable over time.

Operational ROI_

Operational impact has been the most visible change at a team level. Tasks that had previously taken days to complete can now be delivered in under an hour in some areas, particularly where reporting, billing or data reconciliation are automated.

As recurring work becomes easier to standardise and automate, teams can handle higher volumes without increasing headcount. Capacity is created by removing friction from the system, allowing effort to be redirected towards more valuable or customer facing activity.

Decision making ROI_

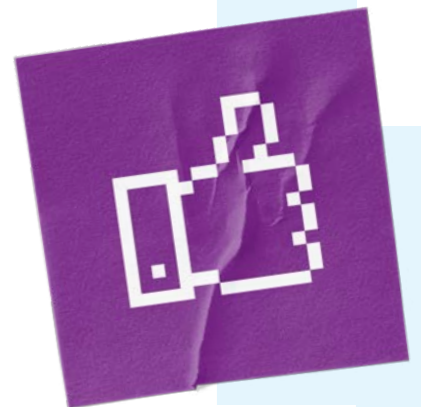
One of the most significant shifts came from improvements in data quality and accessibility. Shared, verified datasets and self service reporting now reduce the time leaders and managers spend assembling information and reconciling conflicting numbers.

Live dashboards shorten the gap between issue and action, reducing both meeting time and decision latency. In parallel, predictive modelling improves confidence in forward looking decisions, particularly in areas such as sales pipeline, service demand and resource planning. This has allowed the business to move from reacting to outcomes to anticipating them.

People and customer ROI_

Employee engagement was treated as a critical leading indicator of overall success, closely linked to customer experience. Better tools, clearer context and simpler workflows have reduced frustration and cognitive load for teams, making it easier to do good work consistently.

These improvements carry through to our clients. More joined up data, faster responses and improved service consistency enhance the overall experience without requiring large scale structural change. While these benefits are hard to express in a single metric, they reinforce the connection between internal capability and external value.



Strategic and reputational ROI_

Not all returns from the Customer Zero journey are reflected directly in financial or operational metrics. One of the most significant outcomes is the credibility gained from having deep, lived expertise across the Microsoft stack, built through running the business on the platform at real scale.

That same foundation also reshaped how marketing contributes to growth. With a clearer data model, defined ICPs and tighter integration between systems, marketing became more precise, more measurable and more directly accountable to revenue. Campaigns could be targeted against specific segments, performance tracked end to end and activity aligned more closely with sales and service priorities.

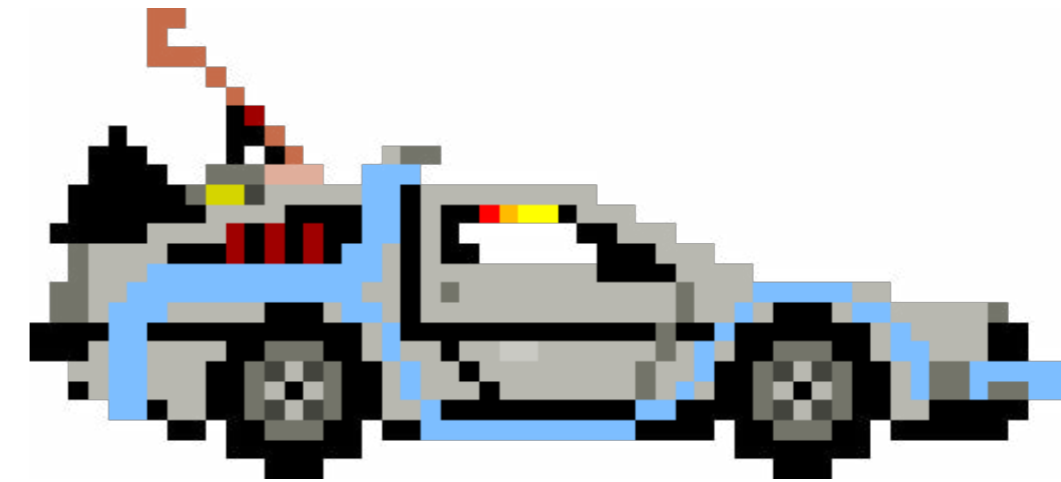
This translated into stronger commercial outcomes. Leads are better qualified earlier, reducing friction between marketing and sales, improving conversion rates and enabling the sales team to focus on higher value opportunities.

Being Customer Zero strengthened conversations with Microsoft and with customers alike. The business was no longer speaking from theory or product knowledge alone, but from direct experience of platform consolidation, data discipline, automation and AI governance in practice. This increased visibility, trust and influence, attracting greater attention from Microsoft, opening new opportunities and reinforcing Infinity's position as a credible advisor rather than just an implementer. This was also a key factor in us being named Microsoft Partner of the Year for Business Central.



“Infinity Group has demonstrated what it means to be a modern, AI-first, Microsoft partner. Their commitment to using a range of Microsoft technologies to secure their business, unify their data and create agent-led processes internally gives them first-hand experience and credibility that ultimately benefits our shared customers in the era of AI.”

– Nick Hedderman, UKI Channel Lead at Microsoft



Futureproofing_

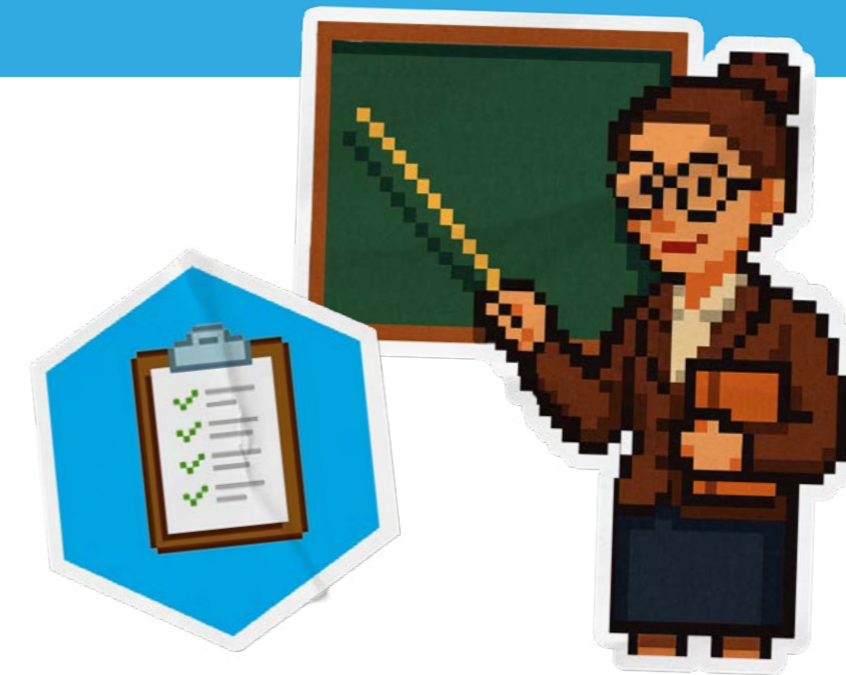
Customer Zero has also strengthened our resilience. Operating on a consolidated Microsoft platform makes it easier to absorb new first party capabilities as they are released, without repeated transformation programmes. Innovation has been adopted progressively, building on existing data, security and processes rather than reworking foundations each time something new emerges.

In practice, our business can evolve alongside the platform itself and vice versa. The experience of being Customer Zero has turned internal transformation into a continuing capability: shaping how the business operates, advises customers and navigates future change with confidence.

Key lessons for leaders considering the same path_

Looking back on the Customer Zero journey, a small number of principles consistently shaped outcomes – and these are the same principles we'd advise to any other leader considering a digital transformation project for their organisation:

- Define the operating model before choosing technology: Clarify how the business needs to work, scale and make decisions in the future. Platform choices become much more effective when they are made in service of an agreed operating model, rather than letting tools dictate behaviour.
- Consolidation is a prerequisite for value, not an optional optimisation: Simplifying systems, suppliers and data sources reduces friction, lowers risk and creates the foundation for reliable reporting, automation and AI. Attempting to optimise or automate on top of fragmentation usually amplifies complexity.
- Use migration as a forcing function for better data decisions: System change creates the opportunity to decide what data genuinely matters. Treat migration as a business exercise: what must be retained for legal or operational reasons, what supports future insight and what no longer adds value.
- Expect standardisation to feel like compromise before it feels like progress: Early stages of platform change may not deliver immediate, visible benefits for every team. Some moves will feel sideways. The long term value emerges as data, reporting, automation and AI capabilities begin to compound across the business. Be patient.




- Make transformation relevant at a departmental level: Adoption improves when people can see how change benefits their own work. Showing leadership, sales, finance, delivery and service teams what better looks like in their context helps sustain momentum and reinforces why consistency matters.
- Treat AI as an accelerator, not a starting point: AI delivers the most value when it builds on stable processes, trusted data and clear governance. Starting with AI before addressing these fundamentals risks automating poor quality inputs and creating new operational risk.
- Design safe paths to experiment: Innovation scales more effectively when experimentation is supported by clear guardrails. Controlled environments, governance and review allow teams to test ideas confidently without creating duplication, sprawl or unintended risk.
- Measure ROI across capacity, speed and quality: Financial savings matter, but they rarely tell the whole story. Improvements in throughput, decision speed, forecast confidence and consistency often deliver equal or greater long term value.


Conclusion_

Becoming Customer Zero was never about pursuing the latest technology. It was about building a simpler, more resilient business that could scale, adapt and make better decisions over time. The results came from deliberate choices: focusing on foundations before innovation, sequencing change carefully, and measuring value in ways that reflected how the business actually worked.

The journey outlined in this ebook is not a prescriptive blueprint. Every organisation will face its own constraints, trade offs and priorities. But what matters is approaching transformation with clarity, intention and a willingness to address complexity before accelerating change.

If you're exploring similar questions — whether around platform strategy, data foundations, AI adoption or proving return on investment — we're always happy to share perspectives from our Customer Zero experience. No pitches, no commitments: just an open conversation about what might make sense for your organisation and where to start.

 [Get in touch with us today](#)

 [Learn more about customer zero in our video series](#)



**INFINITY
GROUP**