



What's Buzzing in CX World This Month?

WHO OWNS YOUR CUSTOMERS ?- IT MAY NOT BE YOU MUCH LONGER!

AI has loomed large again in World News for a variety of different reasons some of which raise issues on aspects like concerns over security and its impact on the world of work. Sites like SUNO raise questions about the effect that sites and others like it raise issues for the music sector but one white paper by Mark Sage has really clearly identified the global impact of AI on the shift of the customer/supplier relationship axis. Everyone from national government down to individual citizen is a customer so every organisation in every supply chain potentially could, to a greater or lesser degree, be affected. These changes are likely to change the face of how CX and EX is managed going forward. The white paper is

Loyalty 2030

Earn the Conversation

Building Customer Gravity in an Agent-Mediated World

The real challenge in modern commerce is not losing the sale.

It is winning the sale while somebody else owns the reason it happened.

Mark Sage, Founder, Kesetian. (marksage@kesetian.com)

Below is the ICXI BUZZ precis but this white paper is highly recommended reading for everyone engaged in CX and EX strategy and management

The Issue

AI agents are becoming the primary interface between customers and commerce. The risk for businesses is not losing the sale but winning it while someone else owns the reason it happened. Firms that fail to respond become the “warehouse endpoint” on another platform’s API, receiving orders but seeing none of the customer understanding behind them.

Why it is Happening Now

Alibaba’s US\$10.2 billion AI raise and the integration of its Qwen assistant across shopping, payments, travel and logistics show what an intent-led platform looks like at scale. Western markets are converging on the same model through a fragmented stack: Google’s Universal Commerce Protocol, agent-ready payment infrastructure from Stripe, Visa and Mastercard, and Meta’s business agents. AI-led traffic to US retailers rose almost 400 per cent year on year in early 2026. Each layer extracts value, and single-use payment tokens can strip out the identifiers merchants use to recognise returning customers.

Intent Is The Asset

Conversations reveal the occasion, constraints and motivations behind a purchase, which transaction records cannot. In the paper's wine example, a customer who usually drinks Bordeaux but wants to impress a host buys a Barolo. The retailer records "Barolo buyer", an inference that is most likely wrong. Platforms are building persistent memory, so their understanding compounds and switching costs rise. The merchant sees only the outcome, like watching a party through a keyhole.

Who Is Exposed

Value concentrates in a "Russian doll" stack: the general-purpose agent holds understanding, aggregators and payment networks take margin, and the merchant at the centre receives a smaller opportunity with little insight. Even strong brands are at risk. Nike has genuine community gravity, yet selling through Gemini risks handing the customer conversation to Google.

The Response: Four Routes To Customer Gravity

Most businesses cannot become Alibaba, but they can give customers a reason to start with them:

- 1 **Breadth:** solve enough connected needs, through ownership, a marketplace (Decathlon) or partnerships.
- 2 **Depth:** own a customer mission rather than an industry category (Uber's Cart Assistant).
- 3 **Community:** become somewhere customers belong, even when there is nothing to buy (Nike Run Club).
- 4 **Engagement:** become part of everyday behaviour through frequency and habit (Luckin, McDonald's).

These routes reinforce one another and are not mutually exclusive. Anthropic's commerce-agent blueprint ("own the memory, rent the intelligence") lets merchants keep the customer relationship inside their own channels. It solves architecture but not distribution, because customers still have to turn up.

Implications For Leaders

- **Participate with eyes open.** The platform that controls the conversation controls where demand flows and who captures the value.
- **Treat intent as the strategic asset,** not just acquisition cost or margin.
- **Build gravity you can credibly own,** and identify which customer needs your network cannot yet meet.

The choice. The question is which customer needs a business can solve well enough that people choose to start with it. Businesses must either build enough gravity to host the conversation or become a capability invoked by someone who does.

Find the new white paper at <https://www.kesetian.com/white-paper-earn-the-conversation>