



From Touchpoints to Intelligence

Preparing brands for an agent driven world

Foreword

Retail is moving from experiences that are designed to decisions that are made - continuously, autonomously, and at scale.

As AWS has articulated through the emergence of the agentic store, AI agents are becoming active participants in commerce. They don't just assist customers; they act on their behalf, evaluating options, resolving tradeoffs, and determining outcomes across digital and physical environments. Increasingly, these decisions happen before a customer ever engages a brand directly.

In this future, relevance is no longer earned at a single touchpoint. It is computed in real time.

AWS provides the cloud and AI foundation that allows agentic systems to reason, adapt, and operate across complex retail ecosystems. Tealium provides the real-time data orchestration that ensures those systems are grounded in truth—unifying online and offline signals into decision-ready intelligence. Together, AWS and Tealium enable retailers to move beyond fragmented experiences and become trusted inputs into AI-driven decisioning.

This ebook explores how omnichannel context has become the currency of agentic retail, and why retailers that invest in real-time orchestration today will shape, not chase the future of customer choice.



Executive Summary



Retail is entering a structural shift that will redefine customer experience and brand competitiveness.

For years, retailers focused on optimising touchpoints: websites, apps, email, stores, knowing that better experiences at each interaction would lead to better outcomes. However, today's customers experience our brands beyond these traditional digital channels, with AI agents emerging as a critical new touchpoint that influences how those interactions unfold. Increasingly, **AI agents act on behalf of customers**, shaping discovery, comparison, substitution, and purchase decisions before a customer ever interacts with a brand directly.

These agentic systems do not operate in one place. They act inside retailer platforms, across partner ecosystems, and within external AI environments that retailers do not control. In this world, customer experience is no longer designed once and delivered repeatedly. It is **continuously decided in real time.**



The retailers that succeed will be those that provide AI agents with accurate, timely and contextual information, across both online and offline interactions. This requires more than analytics, campaigns, or isolated personalisation tools. It requires a real-time data **orchestration layer** that unifies digital and physical signals into a single, decision-ready customer view available to agents in the moment.

This e-book explains why omnichannel data unification is now foundational to agentic AI, how first, second and third-party AI agents are already reshaping retail journeys, and how retail teams can begin preparing immediately without needing to rip and replace their existing stack.



The New Intermediary in Retail Has Already Arrived



Marketers are no longer the only ones having a direct conversion with customers. AI agents increasingly sit in the middle, helping shoppers plan purchases, compare retailers, evaluate availability, and decide where and when to buy. These agents optimise for convenience, certainty, and relevance, not for brand loyalty or carefully crafted campaigns.

In practice, this means decisions are often made before a customer visits a website, opens an app, or walks into a store. An AI assistant may already know which retailer has the right product, at the right price, nearby, with loyalty benefits applied, long before the shopper sees a single ad.

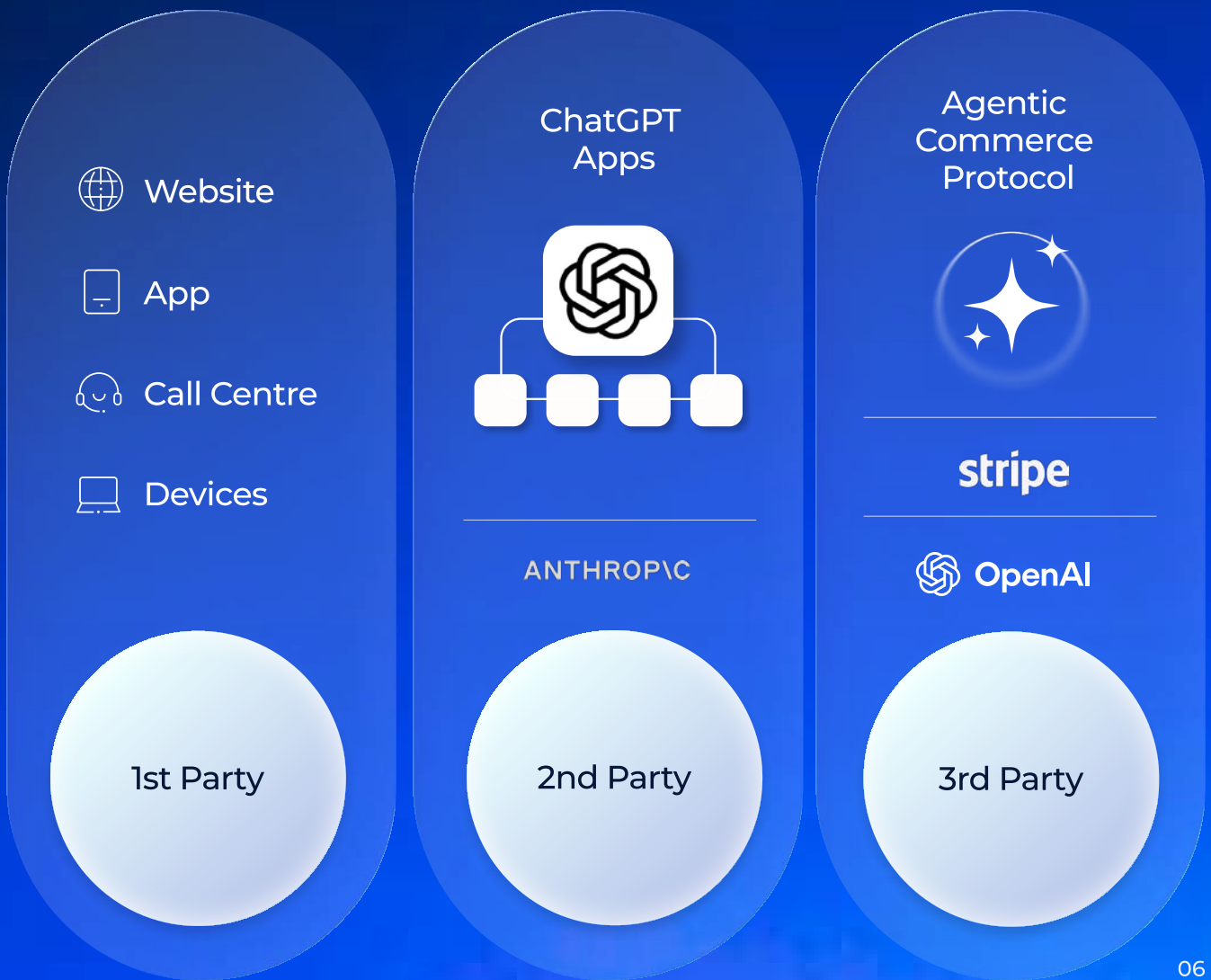
For retailers, this introduces a new challenge: **how does an AI agent experience your brand across digital and physical contexts?** If the answer depends on disconnected systems, delayed updates, or partial data, the brand risks being misrepresented or ignored altogether.



Chapter 02

How First, Second, and Third-Party Agentic AI Are Reshaping Retail

Agentic AI in retail does not operate in just a single channel or platform. It emerges across three distinct layers: first, second and third-party. Each representing a different level of control, visibility, and influence for retailers. Understanding how these layers work together is essential for protecting relevance and enabling omnichannel growth.



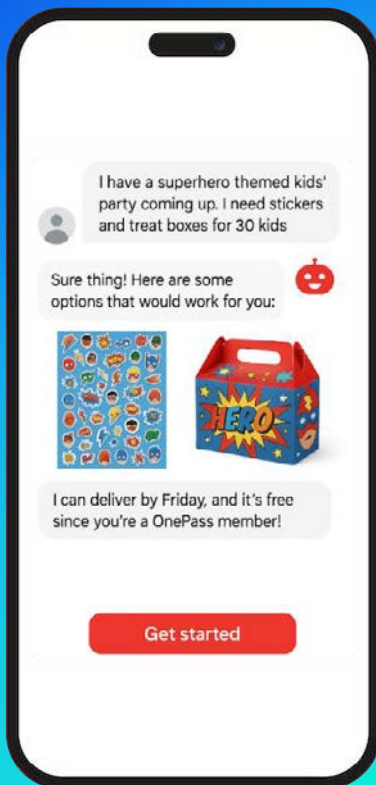
First-Party Agentic AI: Your Agents, Your Domain

First-party agents operate inside environments you control. They deliver agentic convenience to customers while allowing retailers to retain influence over data, experience, and outcomes.

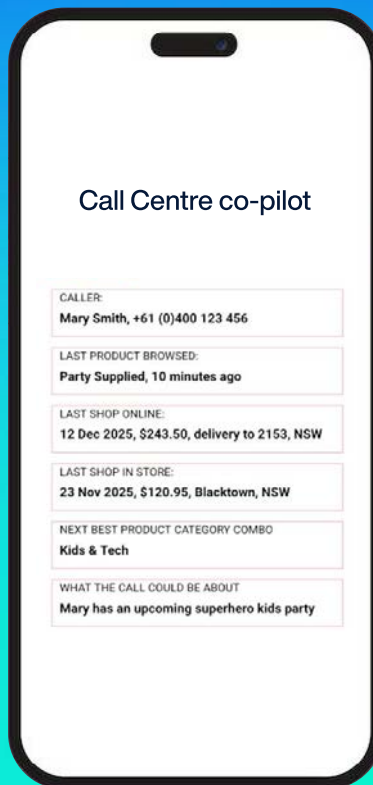
These agents increasingly power conversational commerce on websites and apps, guiding product discovery, managing returns, supporting loyalty enquiries, and assisting with checkout. In call centres, agentic copilots support human agents with real-time context and next-best actions. In physical stores, AI-enabled kiosks, scanners, cameras, and POS systems interpret behaviour and trigger relevant experiences in the moment.

Engagement is more direct and you remain fully in control. These are your agents, operating on unified online and offline data, giving customers the convenience of AI without surrendering control of the experience.

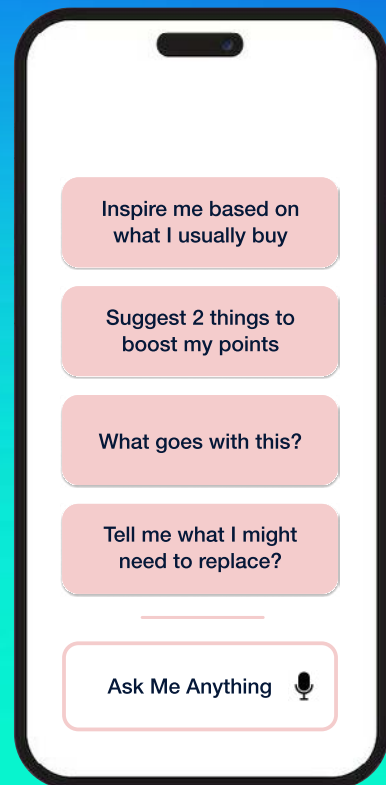
Chatbot



Call Centre co-pilot



NFC In-Store Assistant

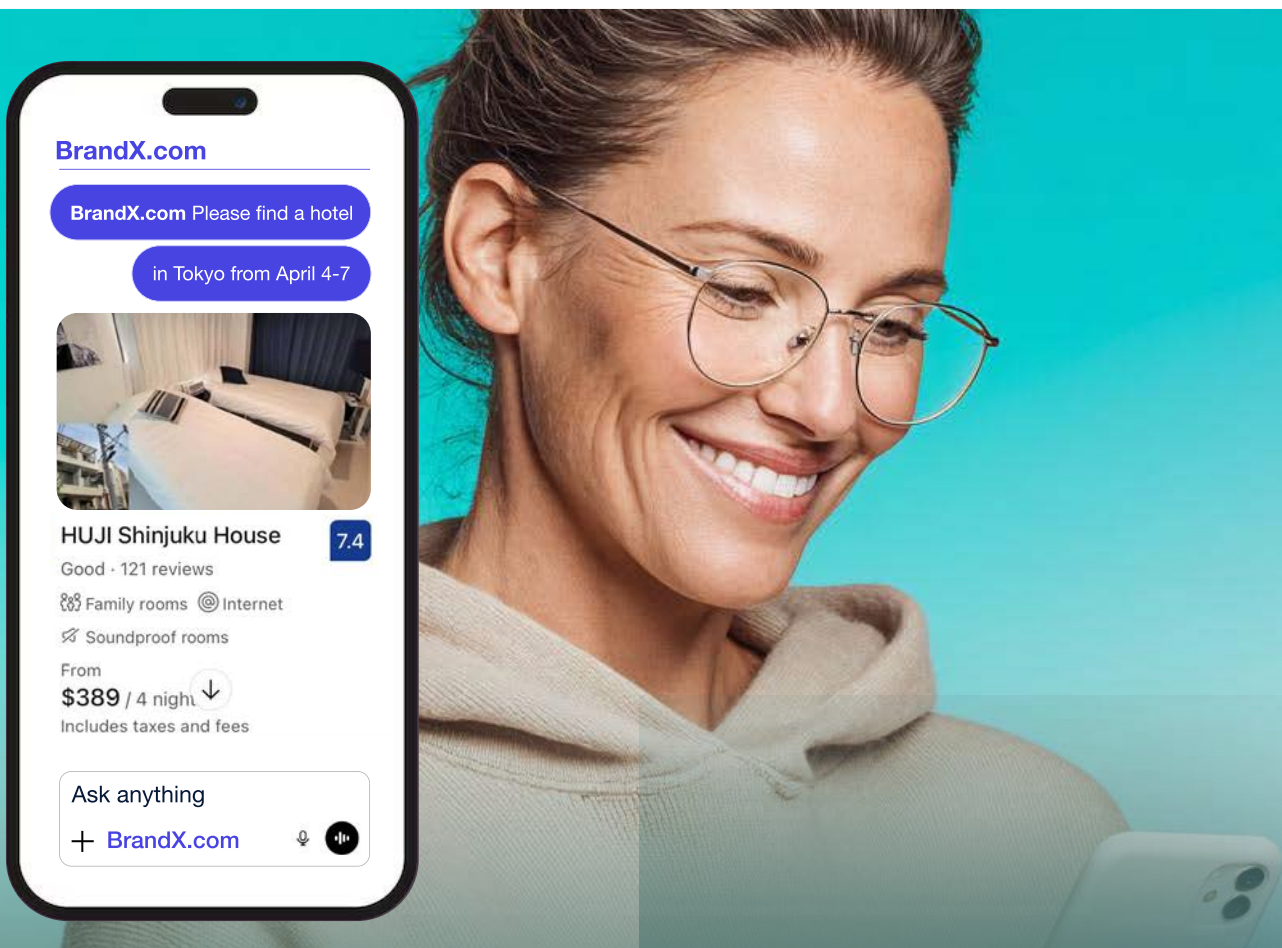


Second-Party Agentic AI: Meeting Customers Where They Already Are

Second-party agents extend your presence into platforms customers already use, while still allowing you to show up as your brand.

We are already seeing this with brand-native apps inside large language model ecosystems. Just as Zillow, Expedia, Coursera, and Spotify now operate within conversational AI environments, retail apps are beginning to follow. Upcoming examples across delivery, mobility, and retail signal that this model will become standard.

This feels similar to the early days of Facebook pages: you don't get every data point you want, but you gain reach, relevance, and engagement where customers already spend time. You are not fully disintermediated. It is still your app, your products, and your brand: your AI agents still get to play a part in the conversation. But your voice is now accessible through agentic interfaces that your customers are already using that shape their discovery and decision-making.





Third-Party Agentic AI: Being Chosen by Agents You Don't Control

Third-party agents are the most disruptive and the most misunderstood. These agents act independently on behalf of users, offering recommendations, comparisons, and even instant checkout across multiple brands.

Through emerging standards such as the Agentic Commerce Protocol (ACP), retailers can expose the components agents need: product intelligence, availability, and transaction capability. When done correctly, any compliant agent can include your products as part of its service without requiring a traditional customer journey.

This may feel like deep disintermediation, but it is not necessarily exclusion. Retailers that prepare their data properly are *included by default* in agentic ecosystems. Those that don't simply disappear from consideration. And smart retailers can use their own AI Agents to influence third-party Agents when responding to instant checkout transactions via ACP, thereby retaining the brand's voice *by design*.

Across all three layers, the common requirement is the same: **unified, real-time customer and product intelligence.**



Why Omnichannel Data Unification Is Now Non-Negotiable

Most retailers still operate with data divided by function. Digital behaviour lives in analytics tools. In-store transactions live in POS systems. Loyalty data sits in CRM platforms. Inventory and pricing are updated on operational timelines, not customer timelines.

Agentic AI does not understand these divisions and cannot operate effectively with such a fractured view of the customer.

When an AI agent evaluates how to respond to a consumer, it needs to know instantly who the customer is, what they have done online, what they have purchased in store, what is available nearby, and what offer makes sense in that moment. If any of those signals are delayed or disconnected, the agent fills in the gaps with assumptions.

This is where many retail experiences quietly fail. Store visits go unrecognised. Loyal customers are treated like first-time browsers. Inventory aware decisions arrive too late. The result is not just poor personalisation, but declining relevance inside AI-driven journeys.

In an agentic world, **fragmented data does not just slow decisions. It distorts them.**



Chapter 04

From Campaigns

Traditional retail activation is campaign-led. Segments are defined in advance. Messages are scheduled. Channels are optimised independently. This approach struggles in an environment where decisions happen continuously and context changes mid-session.



To Context

✦ In stock near you



Find a store now →

Agentic AI requires in-the-moment “context orchestration” at every turn of the conversation.

A real-time data orchestration layer captures events as they happen, resolves identity across devices and channels and triggers next-best actions immediately. Instead of reacting after the journey, orchestration shapes the journey while it unfolds.

For omnichannel retailers, this means online behaviour can inform in-store experiences, store visits can influence digital recommendations, and loyalty status is recognised wherever the customer engages. AI agents, internal or external, receive complete and current context rather than isolated signals.

This shift from campaigns to context orchestration is what enables agentic AI to operate effectively.



Preparing for Agentic Retail — Where to Start

Many retailers already have parts of this foundation in place. If you are already using Tealium, you are capturing real-time events and unifying customer profiles that can feed agentic systems today. If you are also operating on cloud platforms such as AWS, AI services can consume this orchestrated data to power decisioning at scale.

But agentic readiness does not require a complex transformation upfront.

For retailers without a data orchestration layer or with fragmented implementations, the most effective path forward is simple:



01



First, establish a real-time data layer that captures digital and physical interactions consistently. This creates the raw signal stream that AI agents depend on.

02



Second, unify identity across online and offline touchpoints so every interaction contributes to a single, evolving customer view.

03



Third, activate that intelligence in-session, triggering next-best actions, offers, and experiences while intent is still high.

Tealium enables retailers to do this without replacing existing systems. It sits above channels and tools, orchestrating data rather than owning it. This makes it an ideal starting point for agentic readiness, whether or not AI models are deployed on day one.



In Conclusion

The Future of Agentic Retail Is Context Orchestration



AI in retail is moving from touchpoints to intelligence.

Many organisations have already established cloud platforms as the foundation for scaling AI. The next challenge is ensuring these systems can act with the right context, at the right time, across channels and moments that define customer experience.

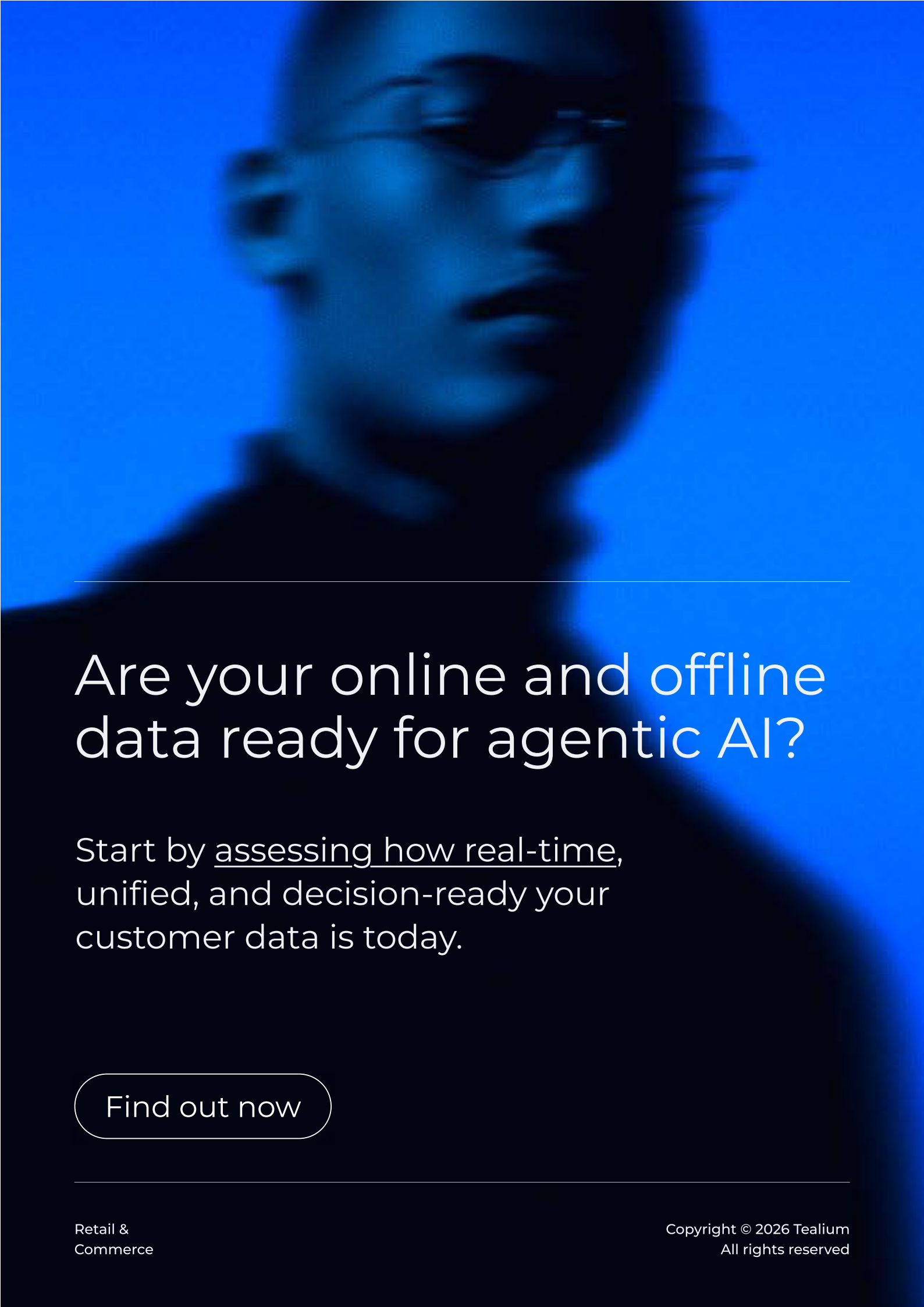
AI does not fail because of models. It fails because it lacks real-time context. Systems operating on static or delayed data struggle to reflect what is happening in the moment, limiting both relevance and control.

This is where the collaboration between Tealium and AWS becomes critical. Tealium provides the real-time context engine that ensures AI systems operate on up-to-date, consented customer data across AWS services such as Bedrock, SageMaker, and Connect. This enables AI to move from isolated predictions to continuous, in-session action across digital and physical experiences, grounded in live context and governance.

Ready to operationalise AI with real-time data? Activate Tealium via AWS Marketplace to scale faster.

That is where the next phase of advantage will be built.





Are your online and offline data ready for agentic AI?

Start by assessing how real-time, unified, and decision-ready your customer data is today.

Find out now



About Tealium

Tealium helps companies collect, govern, and enrich their customer data in real-time to power AI initiatives and delight customers in the moments that matter. Tealium's turnkey integration ecosystem supports more than 1,300 built-in connections from the world's most prominent technology experts. Tealium's solutions include a real-time customer data platform (CDP) with intelligent AI data streaming, tag management, and an API hub. Tealium's data collection, management, and activation capabilities enable enterprises to accelerate operating performance, enhance customer experiences, drive better outcomes, and support global data compliance. More than 850 leading businesses globally trust Tealium to power their customer data strategies.

For more information, visit tealium.com