PEOPLE + INSIGHTS + TECHNOLOGY = BRIGHTER OUTCOMES

THE CUSTOMER INTENT GUIDE

A Practical Guide to Understanding What Customers Are Trying to Accomplish

From Understanding People to Enabling Possibilities

CUSTOMERS

Goals
Needs
Questions
Decisions
Challenges
Opportunities

TECHNOLOGY

Data
Analytics
AI
Automation
Agents
Scale

Signals › Evidence › Meaning › Intent › Outcomes

CUSTOMER INTENT

UNDERSTANDING CONNECTS WHAT MATTERS

CUSTOMER SUCCESS

Informed
Confident
Enabled
Accomplished

Different Perspectives. A More Connected Future.

YASHA STERLING

CREATOR OF CUSTOMER INTENT INTELLIGENCE AND ECIIS™

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This guide introduces a disciplined, outcome-centered approach to understanding Customer Intent, acting proportionately, verifying outcomes, and learning from what actually happens.

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The customer is trying to accomplish something

Five minutes, two priorities

At 9 a.m., she wanted to understand her bill. By 9:05, she wanted to know how to keep the lights on.

9:00 a.m.

“Why did my bill go up?”

She opens her bill and compares it with last month’s. She wants to know whether the increase came from usage, a rate change, or a charge she doesn’t recognize.

Immediate goal: Understand the increase.

9:05 a.m.

“How do I keep my service on?”

She notices a past-due notice with a deadline tomorrow. She knows she can’t pay the full balance today. Now she needs to find out what options, if any, could keep service on and what she has to do by the deadline.

Immediate goal: Find a workable way to avoid an interruption.

Both goals still matter. The notice changed which one she needed to address first. This example is hypothetical.

Organizations have become extraordinarily good at observing customers. We can see what customers search for, which pages they visit, what they click, where they abandon, when they call, and what they purchase. Artificial intelligence can analyze those signals at scale and predict what customers may do next.

But beneath all of that observable activity is a more fundamental question: What is the customer actually trying to accomplish?

A customer searching for information about a high bill is not simply performing a search. A customer comparing electric vehicle incentives is not simply consuming content. A customer repeatedly checking an outage page is not simply generating traffic. Each customer is trying to accomplish something.

> What the customer did tells us about behavior. What the customer was trying to accomplish points us toward intent.

This Guide provides a practical foundation for understanding Customer Intent, interpreting evidence, assessing confidence, defining Desired Outcomes, selecting Appropriate Action, verifying outcomes, and learning from what actually happens.

The objective is not merely to assign an intent label. It is to understand enough about what the customer is trying to accomplish that an organization can determine whether the experience is capable of helping the customer accomplish it.

The Customer Intent-*to*-Outcome Cycle

FROM CUSTOMER SIGNALS TO CUSTOMER SUCCESS

A continuous cycle for understanding what customers are trying to accomplish, enabling the right response, and learning from what actually happens.

A more intentional way forward.

CUSTOMERS

Goals
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TECHNOLOGY

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Systems
Scale

1

UNDERSTAND

Turn signals into meaning and infer intent.

- **Signals** — What happened?
- **Evidence** — What is relevant?
- **Meaning** — What does it suggest?
- **Inferred Intent** — What is the customer trying to accomplish?

2

DEFINE SUCCESS

Clarify what the customer needs to achieve.

- **Desired Outcome** — What needs to become true?
- **Success Criteria** — How will we know it's achieved?

3

ASSESS

Determine if success is achievable and how confident we should be.

- **Outcome Feasibility** — Can the experience enable it?
- **Intent Confidence** — How strongly does the evidence support our inference?

4

DECIDE

Evaluate risk and authority, then take a proportionate response.

- **Intent Consequence** — What happens if we're wrong?
- **Authorization** — Are we permitted to take this action?
- **Appropriate Action** — What should we do next?

5

VERIFY

Determine whether the customer achieved the intended outcome.

- **Observed Outcome** — What actually happened?
- **Outcome Verification** — Did it meet the success criteria?
- **Customer Success** — Did the customer accomplish what they intended?

6

LEARN

Use outcomes to improve future understanding and action.

- **Learning** — What does the result teach us?
- **Update** — What should change?

CUSTOMER INTENT

THE BRIDGE BETWEEN PEOPLE AND POSSIBILITY

People-Centered
Start with real customer objectives.

Evidence-Based
Ground interpretation in relevant evidence.

Outcome-Focused
Enable what customers are trying to accomplish.

Responsibly Applied
Act with appropriate confidence, consequence, and authorization.

Continuously Learning
Use outcomes to improve future understanding and action.

THE CUSTOMER INTENT GUIDE

A Practical Guide to Understanding What Customers Are Trying to Accomplish

YASHA STERLING

Creator of Customer Intent Intelligence and ECIIS™

The goal is not visibility.

The goal is customer success.

1. What Is Customer Intent?

Customer Intent concerns the purpose an interaction serves, not merely the action a customer performs.

> Customer intent is what the customer is trying to accomplish in a given situation.

The bill example separates four pieces of the same interaction. The desired outcome describes what success would look like.

Term	At 9:05 a.m.
Signal	She opens the past-due notice and views payment options.
Intent	She’s trying to find a way to keep her service on.
Motivation	She depends on electricity at home and wants to avoid an interruption.
Desired outcome	She completes an available step in time and her service stays on.

Suppose a customer visits an EV incentive page. The customer might be determining eligibility, evaluating affordability, estimating charging expenses, comparing options, or preparing for a purchase. The action is observable. The purpose must be interpreted.

2. Customer Intent Is Not Customer Behavior

The same intent can produce different behaviors, and the same behavior can represent different intentions.

Organizations collect searches, clicks, page views, calls, chats, purchases, form submissions, abandonment, and repeat visits. These signals matter, but they do not establish intent by themselves.

Behavior can provide evidence of intent.

If behavior is treated as intent, the inference disappears. A disciplined approach keeps the reasoning visible.

The Customer Intent Evidence Progression

Signal	Evidence	Meaning	Inferred Intent

Observation remains distinct from interpretation.

A signal is something observable. Evidence is a signal relevant to the question. Meaning is what the evidence reasonably suggests in context. Inferred Intent is the most defensible interpretation of what the customer may be trying to accomplish.

3. Customer Intent Is Not Search Intent

Search provides rich evidence because people express needs through language. Traditional search-intent classifications can explain whether a query is informational, navigational, commercial, or transactional. Customer Intent asks a broader question.

> Search intent asks what the person wants from a search, such as an explanation or a particular page. Customer intent asks what getting that answer or reaching that page would help them do. Sometimes understanding the answer is the whole goal. Sometimes it’s one step toward resolving a bigger problem.

A query such as EV rebates Illinois may be informational. The customer may nevertheless be trying to determine affordability, eligibility, timing, or total cost of ownership. Search intent can provide evidence of Customer Intent without representing the complete objective.

4. Customer Intent Is Not Predicted Behavior

Predictive systems estimate what a customer may do next. That capability is useful, but it answers a different question from intent.

Construct	Question
Behavior	What did the customer do?
Prediction	What is the customer likely to do next?
Customer Intent	What is the customer trying to accomplish?
Desired Outcome	What needs to become true?
Customer Success	Did it happen?

> Predicting what a customer is likely to do next is not the same as understanding what the customer is trying to accomplish.

5. Stated and Inferred Intent

Customers can state their intent directly. When they do not, teams may infer it from relevant signals such as searches, behavior, conversations, feedback, and service interactions.

The signal is observable. The customer may state their intent, or we may infer it.

Evidence-to-Intent Progression

Signals	Evidence	Meaning	Inferred Intent

A customer's statement is evidence of what they say they want. Other signals often admit several explanations. A high exit rate could mean customers found the answer, could not find it, or moved to another channel. In the bill example, the notice view suggests urgency. A question in chat could clarify what the customer needs first.

What is observed should remain distinct from what is inferred.

6. Intent Confidence

Intent Confidence answers: How strongly does the available evidence support the Inferred Intent relative to other plausible interpretations?

Confidence belongs to the inference, not the customer. A customer may be uncertain about a decision while clearly stating the objective. Conversely, the organization may observe many behaviors while still lacking strong evidence of the objective.

Level	Evidence condition	Appropriate posture
Low	Ambiguous evidence; several plausible explanations	Learn or clarify
Moderate	Relevant evidence converges; uncertainty remains	Assist cautiously
High	Strong, current, relevant evidence supports the inference	Respond specifically

Intent Confidence may increase with directness, specificity, independent convergence, consistency, recency, context, and outcome evidence. Signal volume alone is insufficient.

> More data does not automatically mean more Intent Confidence.
> Confidence does not turn an inference into certainty.

7. Competing Intent Hypotheses

Strong intent analysis considers more than the first plausible explanation. For a high-bill journey, hypotheses may include understanding the increase, verifying accuracy, finding a way to pay, determining eligibility for assistance, or reducing future costs.

The analyst should ask not only What does the evidence support? but also What else could explain the evidence?

When ambiguity materially affects what should happen next, asking the customer may be more intelligent than inferring further.

> Inference should not replace confirmation when confirmation is practical and appropriate.

8. Intent Is Only the Beginning

Even a correct Inferred Intent does not guarantee Customer Success. Intent begins an outcome-centered progression.

The Customer Outcome Progression

Intent	Desired Outcome	Success Criteria	Outcome Feasibility	Customer Success

> Intent tells us where the customer is trying to go. It does not tell us whether the organization has made it possible to get there.

9. Desired Outcomes

A Desired Outcome is the condition the customer wants to become true through successful accomplishment of the intent.

If the intent is to determine whether an EV is financially feasible, the Desired Outcome may be to have enough reliable information about incentives, charging costs, installation considerations, and ownership expenses to make an informed affordability decision.

An experience can provide information without enabling the customer's Desired Outcome.

This Guide distinguishes the Desired Outcome from the Observed Outcome, which is what actually occurred.

10. Success Criteria

Success Criteria specify the conditions that provide evidence that the Desired Outcome has been achieved. They make customer accomplishment testable.

For an EV affordability decision, Success Criteria may include understanding incentives, eligibility, charging costs, relevant rates, installation considerations, ownership implications, and next steps.

> Measure what demonstrates accomplishment, not simply what happens to be measurable.

11. Outcome Feasibility

Outcome Feasibility asks whether the experience provides the information, capabilities, conditions, and pathways reasonably necessary to enable the Desired Outcome.

Dimension	Question
Information	Is the required information available?
Clarity	Can the customer understand what it means?
Capability	Can the necessary action be completed?
Eligibility	Can applicability be determined?
Dependencies	What must happen elsewhere?
Continuity	Does context survive channel changes?
Effort	How much work is required?
Friction	What makes success unnecessarily difficult?
Handoffs	Does relevant understanding travel?

> Can this experience actually do the job the customer needs it to do?

12. Customer Intent Across Channels

Organizations think in channels. Customers think in objectives. A customer may begin in search, continue on a website, consult an AI assistant, use an application, and speak with an employee while pursuing one objective.



The channel may change. The Customer Intent may not. Channels produce signals. Customers pursue outcomes.

Channel switching is evidence, not automatic proof of failure. The organization should examine what occurred before the change, what happened after it, whether intent persisted or evolved, and whether the Desired Outcome was achieved.

13. Intent Continuity

Intent Continuity is the preservation and responsible refinement of relevant understanding as a customer pursues an objective across interactions, channels, or time. Data Continuity preserves information. Journey Continuity preserves progress. Intent Continuity preserves enough relevant understanding to continue helping while remaining open to new evidence.

Intent state	Meaning
Emerging	Early signals; objective remains unclear
Inferred	Evidence supports a defensible interpretation
Persistent	New evidence supports substantially the same objective
Evolving	The objective changes or becomes more specific
Resolved	Evidence indicates accomplishment
Interrupted	Pursuit stops or becomes unobservable
Replaced	A different objective becomes better supported

Customer Intent describes an objective, not a person. Carry forward context, not permanent assumptions.

As evidence ages or context changes, confidence should decline unless newer evidence reinforces the interpretation. This is confidence decay.



Learning strengthens the next cycle.

14. Intent Consequence

Intent Consequence is the potential impact of acting on an Inferred Intent if the inference is incomplete, outdated, or wrong. It belongs to the proposed action, not to the customer.

Level	If wrong...	Example response
Low	Limited impact; easy to ignore or reverse	Recommend content
Moderate	Meaningful effort, confusion, or journey impact	Offer and validate
High	Financial, service, eligibility, access, or obligation impact	Verify and confirm

> Confidence belongs to the inference. Consequence belongs to the action.

Reversibility matters. Repeated low-consequence actions can also accumulate into a high-consequence pattern when an incorrect inference repeatedly shapes the experience.

Permission to infer is not permission to act.

15. Appropriate Action

Appropriate Action is a proportionate response based on Intent Confidence, Intent Consequence, and Authorization.

Confidence - Consequence - Authorization

Intent Confidence	Intent Consequence	Authorization	Appropriate Action

The action should pass three gates: Do we understand the customer well enough? What happens if we are wrong? Are we permitted to take this specific action?

Confidence is not consent.

Action level	Purpose
Observe	Continue gathering evidence
Explore	Surface broad, optional possibilities
Clarify	Ask what the customer is trying to accomplish
Assist	Provide relevant information or capability
Personalize	Adapt the experience more specifically
Recommend	Suggest while preserving choice
Confirm	Expose the interpretation or proposed action
Act	Perform the authorized action with appropriate safeguards

Understanding intent does not create authority to act. Infer where inference helps. Confirm where confirmation protects.

16. Outcome Verification

Outcome Verification is the disciplined determination of whether the Observed Outcome satisfies the Success Criteria associated with the Desired Outcome.

Desired Outcome vs. Observed Outcome

Desired Outcome	Success Criteria	Observed Outcome	Outcome Verification	Customer Success?

> Completion tells us that an interaction ended. Outcome Verification tells us whether the Desired Outcome was achieved.

Evidence type	What it shows
Progress Evidence	Movement toward the Desired Outcome
Completion Evidence	A process or interaction finished
Outcome Evidence	The desired condition became true

Verification state	Meaning
Unverified	Insufficient evidence to determine achievement
Progressing	Meaningful movement; criteria not yet satisfied
Provisionally Verified	Strong evidence; one or more confirmation points remain
Verified	Success Criteria are supported by adequate evidence
Not Achieved	Evidence indicates the Desired Outcome was not achieved

False Success occurs when a positive organizational metric is treated as Customer Success without evidence that the Desired Outcome was achieved.

> Operational success and Customer Success should be measured separately before they are interpreted together.

17. Learning From Outcomes

Learning uses verified outcomes and subsequent evidence to improve future understanding, decisions, experiences, and actions.

Outcomes are evidence about the quality of our understanding.

Outcome Measurement asks what happened. Outcome Verification asks whether the Desired Outcome was achieved. Learning asks what the result teaches us about what we believed, what we did, and what should change.

Observe	Verify	Compare	Diagnose	Learn	Update

Learning strengthens the next cycle. Diagnosis should examine the Inferred Intent, Intent Confidence, Desired Outcome, Success Criteria, Outcome Feasibility, Appropriate Action, Authorization, and possible intent evolution.

One outcome can generate a hypothesis. Repeated evidence is required to establish a pattern. Customer correction is especially valuable evidence.

When evidence contradicts the model, the model should learn rather than forcing the evidence to fit.

Part VII · Governance

18. Customer Intent Governance

Customer Intent Governance is the set of principles, decision rights, controls, accountability mechanisms, and evidence standards that govern how Customer Intent is inferred, used, acted upon, retained, reassessed, verified, and learned from.

Governance applies across the full reasoning chain, not only at the point where AI acts.

Customer Intent Governance Controls

Evidence	Inference	Confidence	Consequence	Authorization	Outcome	Learning

Governance should preserve provenance among what was observed, stated, inferred, predicted, authorized, acted upon, and verified. Availability does not establish relevance. Confidence does not create permission. Customer correction should trigger reassessment.

The goal is not maximum inference. The goal is sufficient understanding to responsibly enable the customer's intended outcome.

The Five-Question Governance Test

- What do we know?
- What are we inferring?
- What are we proposing to do?
- What gives us the authority to do it?
- How will we know whether it helped the customer succeed?

The goal of governance is not to limit customer intelligence. It is to ensure that customer intelligence remains worthy of the customer's trust.

19. Implementing Customer Intent in Practice

> Start narrow. Learn deeply. Expand deliberately.

Implementation should begin with one meaningful customer objective, one bounded experience, a manageable evidence set, a Desired Outcome, and clear Success Criteria. It should not begin with an enterprise technology inventory or an attempt to infer every customer intent.

Customer Intent Implementation Cycle



Minimum Viable Customer Intent Pilot

- One meaningful customer problem and one experience
- Three to five evidence sources
- Two to five plausible intent hypotheses
- One Desired Outcome and three to six Success Criteria
- Low / Moderate / High scales for Intent Confidence and Intent Consequence
- Explicit Authorization boundaries
- At least one meaningful outcome measure
- A formal learning review

Automate demonstrated understanding, not untested assumptions.

Before scaling, the organization should be able to explain what it inferred, how confident it was, what action followed, what authority existed, what actually happened, whether the Desired Outcome was achieved, and what changed because of the outcome.

Do not scale the ability to infer faster than the ability to learn whether the inference was useful.

EXERCISE · PUT IT INTO PRACTICE

Where might the customer’s priority change?

Take one journey you know well. Find the moment when a customer learns something that could change what they need next, such as a deadline, a fee, or a requirement they can’t meet.

01

Write what the customer might be trying to do before and after that moment.

02

Identify one piece of evidence that could distinguish a change in priorities from an ordinary next step.

03

Ask what help would match the new priority and how you would know whether it worked.

In the bill example, a visit to the payment options page shows that the customer found the page. To know whether she could act in time, you’d need evidence about the option she could use, what happened next, and whether her service stayed on.

When a customer reorders two goals

Return to the bill example on page 3. After the customer sees the notice, keeping service on becomes urgent. Understanding the increase still matters. Carry both goals forward and ask which one the customer needs help with first.

Read the Customer Intent Guide online

20. From Intent to Intelligence

Customer Intent asks what the customer is trying to accomplish. When organizations must answer that question continuously across customers, channels, systems, interactions, and outcomes, the challenge becomes an intelligence problem.

> Customer Intent is the object of understanding. Customer Intent Intelligence is the discipline of creating and applying that understanding.

Customer intent concerns the customer's goal. Customer Intent Intelligence is the discipline of investigating that goal with evidence, deciding how to respond, and checking whether the response helped.

In this guide, applying the discipline includes defining success criteria, testing feasibility, choosing an authorized response, verifying the outcome, and learning from what happened.

Stage	Focus
UNDERSTAND	Signals | Evidence | Meaning | Inferred Intent
DEFINE SUCCESS	Desired Outcome | Success Criteria
ASSESS	Outcome Feasibility | Intent Confidence
DECIDE	Intent Consequence | Authorization | Appropriate Action
VERIFY	Observed Outcome | Outcome Verification | Customer Success
LEARN	Learning

At enterprise scale, Customer Intent reasoning may need to operate across millions of signals, business functions, human and digital channels, AI systems, operational processes, and changing objectives. ECIIS(TM), the Enterprise Customer Intent Intelligence System(TM), extends the discipline into enterprise operating capability.

The Progression

Customer Intent	Customer Intent Intelligence	ECIIS(TM)	Customer Success

This Guide establishes the Customer Intent foundation. Customer Intent Intelligence extends that foundation into a discipline. ECIIS(TM) extends the discipline into enterprise operational capability.

QUICK REFERENCE

From customer signals to customer success

Step	Practitioner question
1. Signals	What actually happened?
2. Evidence	Which signals are relevant?
3. Meaning	What does the evidence reasonably suggest?
4. Inferred Intent	What is the customer most plausibly trying to accomplish?
5. Desired Outcome	What needs to become true?
6. Success Criteria	How would we know?
7. Outcome Feasibility	Can the experience enable it?
8. Intent Confidence	How strongly does the evidence support the inference?
9. Intent Consequence	What happens if we act and are wrong?
10. Authorization	Are we permitted to take the action?
11. Appropriate Action	What proportionate response is justified?
12. Observed Outcome	What actually happened?
13. Outcome Verification	Did the Observed Outcome satisfy the Success Criteria?
14. Learning	What should change because of the outcome?

> What is the customer trying to accomplish?
> Can the customer actually accomplish it?
> Did they?

Intent - Feasibility - Customer Success

CONCLUSION

What is the customer trying to accomplish?

The entire Guide can be reduced to three questions: What is the customer trying to accomplish? Can the customer actually accomplish it? Did they?

Behavior provides signals. Signals become evidence. Evidence supports meaning. Meaning supports an Inferred Intent. Intent points toward a Desired Outcome. Success Criteria define accomplishment. Outcome Feasibility tests whether the experience can enable it. Intent Confidence, Intent Consequence, and Authorization determine Appropriate Action. Outcome Verification establishes what happened. Learning strengthens the next cycle.

The objective is not to infer everything that can possibly be inferred, predict every next action, personalize everything, or automate every interaction technology makes possible. The objective is to understand enough to responsibly enable the intended outcome, determine whether that outcome is achievable, verify whether it was achieved, and learn from what actually happened.

> The goal is not visibility.
> The goal is customer success.

Yasha Sterling

About the author

Yasha Sterling

Yasha Sterling is a Customer Intent Intelligence researcher, author, practitioner, and creator of ECIIS(TM), the Enterprise Customer Intent Intelligence System(TM).

Sterling's work focuses on a fundamental question: What is the customer trying to accomplish?

Her work examines how organizations can move beyond behavioral signals, search intent, prediction, and interaction-level metrics to develop a deeper, evidence-based understanding of Customer Intent and the outcomes customers are trying to achieve.

Her Customer Intent Intelligence work connects Signals, Evidence, Meaning, Inferred Intent, Desired Outcomes, Success Criteria, Outcome Feasibility, Intent Confidence, Intent Consequence, Authorization, Appropriate Action, Outcome Verification, and Learning into an outcome-centered approach to customer understanding.

She created ECIIS(TM) to extend Customer Intent Intelligence into an enterprise approach for transforming customer signals into understanding, action, measurement, and continuous learning.

Through her research, writing, frameworks, and practitioner tools, Sterling advocates for a shift from observing what customers do, to understanding what customers are trying to accomplish, to determining whether experiences can enable those objectives, to verifying whether customers actually succeed.

The goal is not visibility. The goal is customer success. Yasha Sterling

GLOSSARY

Canonical terms

Term	Definition
Appropriate Action	A proportionate response based on Intent Confidence, Intent Consequence, and Authorization.
Authorization	The permission or authority required for an actor to take a specific action.
Customer Intent	Customer intent is what the customer is trying to accomplish in a given situation.
Customer Intent Intelligence	The discipline of investigating the customer’s goal with evidence, deciding how to respond, and checking whether the response helped.
Customer Success	The achievement of the customer's intended outcome.
Desired Outcome	The condition the customer wants to become true through successful accomplishment of the intent.
Evidence	A Signal relevant to the customer-intent question being examined.
Inferred Intent	The most defensible interpretation of what the customer is trying to accomplish based on available Evidence.
Intent Confidence	The degree to which Evidence supports an Inferred Intent relative to plausible alternatives.
Intent Consequence	The potential impact of acting on an Inferred Intent if the inference is incomplete, outdated, or wrong.
Intent Continuity	The preservation and responsible refinement of relevant understanding across interactions, channels, or time.
Learning	The use of verified outcomes and subsequent Evidence to improve future understanding and action.
Meaning	What the available Evidence reasonably suggests in context.
Motivation	Why accomplishing the goal matters to the customer.
Observed Outcome	What actually occurred following the interaction and any organizational response.
Outcome Feasibility	Whether an experience provides the information, capabilities, conditions, and pathways necessary to enable the Desired Outcome.
Outcome Verification	The disciplined determination of whether the Observed Outcome satisfies the Success Criteria associated with the Desired Outcome.
Signal	An observable action, statement, event, condition, or interaction that may be relevant to understanding Customer Intent.
Success Criteria	The conditions that provide Evidence that the Desired Outcome has been achieved.

Key distinctions

Do not confuse	With
Behavior	Customer Intent
Search Intent	Customer Intent
Prediction	Inferred Intent
Signal	Evidence
Evidence	Proof
Inferred Intent	Fact
Intent Confidence	Customer certainty
Intent Confidence	Authorization
Customer Intent	Consent
Desired Outcome	Observed Outcome
Completion	Customer Success
Operational Success	Customer Success
Historical Intent	Current Intent
Automation capability	Authority to act

> Customer Intent describes an objective, not a person.