

DIAGNOSTIC CHECKLIST

Is Your Marketing System Ready for AI, Personalization, and Revenue Accountability?

AI readiness is not a separate checkbox. It depends on the strength of the full marketing system: trusted data, responsible first-party data use, governed personalization, strong marketing operations, clear messaging, and business-impact reporting.

Use this checklist to identify whether your marketing foundation is ready to support AI, automation, personalization, and measurable revenue growth.

How to use this checklist

For each statement, score your organization:

- 0 = Not in place
- 1 = Partially in place
- 2 = Mostly in place
- 3 = Fully in place and consistently used





1. Data Confidence

Can your team trust the data used for segmentation, scoring, personalization, AI recommendations, and reporting?

Diagnostic Question

Score

We have clear definitions for lifecycle stages, lead sources, campaign attribution, and revenue metrics.

Our CRM and marketing automation data are clean enough to support segmentation, reporting, and sales follow-up.

We know which data is reliable for executive decisions versus directional optimization.

Our campaign, contact, company, and opportunity data are consistently structured across systems.

We have a process for identifying and correcting data quality issues.

Subtotal: / 15



2. First-Party Data Value Exchange

Are you collecting first-party data in ways that are transparent, useful, and valuable to the buyer?

Diagnostic Question

Score

We collect first-party data through clear, intentional interactions such as forms, assessments, content engagement, webinars, product usage, or preference signals.

Prospects and customers receive clear value in exchange for their shared data.

We understand the difference between declared data, behavioral data, inferred data, and sensitive data.

We have clear rules for how first-party data can be used in marketing, sales, and customer communications.

Our first-party data strategy supports better buyer experiences, not just more targeting.

Subtotal: / 15



3. Personalization and Trust

Does personalization make the buyer journey more helpful without feeling invasive, assumptive, or disconnected?

Diagnostic Question

Score

We have defined where personalization adds value and where it may create confusion, risk, or discomfort.

Our personalization reflects relevant buyer context such as role, company stage, industry, pain point, lifecycle stage, or buying committee role.

We avoid using sensitive or overly specific behavioral signals in ways that could feel intrusive.

Personalized experiences are coordinated across email, website, sales outreach, advertising, and customer communications.

We regularly review personalized journeys to confirm they are still appropriate, relevant, and accurate.

Subtotal: / 15



4. Marketing Operations and Governance

Are the people, processes, ownership, and rules around your MarTech stack strong enough to prevent automation drift?

Diagnostic Question

Score

We have documented ownership for key workflows, forms, lists, lifecycle rules, lead scoring, routing, and reporting processes.

Our automation is regularly reviewed to determine what should be improved, retired, consolidated, or rebuilt.

Marketing, sales, and customer success share clear definitions for handoffs, lifecycle stages, and follow-up expectations.

We have naming conventions, documentation standards, testing processes, and approval rules for new automation.

Our MarTech stack supports our current go-to-market motion rather than outdated business assumptions.

Subtotal: / 15



5. Story and Messaging Strategy

Do you have a clear revenue story that AI and automation can scale without diluting or distorting the message?

Diagnostic Question

Score

We have a clear point of view on the market problem we solve and why it matters now.

Our messaging connects buyer pain, business risk, product value, proof points, and measurable outcomes.

Content and campaigns are mapped to buyer roles, buying committee needs, lifecycle stages, and decision moments.

AI-generated or AI-assisted content is reviewed against brand voice, accuracy, compliance needs, and strategic messaging.

Sales, marketing, and leadership tell a consistent story about why buyers should act and why our solution is credible.

Subtotal: / 15



6. Revenue Accountability

Can marketing translate activity into business impact in language the C-suite can trust and act on?

Diagnostic Question

Score

Marketing reporting connects activity to pipeline, revenue, sales efficiency, retention, expansion, or customer growth.

We distinguish between activity metrics, performance metrics, leading indicators, and business impact metrics.

Our reporting explains what marketing performance means for investment decisions, not just what happened.

We use a mix of revenue metrics, leading indicators, qualitative insight, and clearly stated assumptions rather than relying on oversimplified attribution.

Leadership, sales, and marketing trust the reporting enough to use it for planning, prioritization, and growth decisions.

Subtotal: / 15

Total Score

Section	Score
Data Confidence	/ 15
First-Party Data Value Exchange	/ 15
Personalization and Trust	/ 15
Marketing Operations and Governance	/ 15
Story and Messaging Strategy	/ 15
Revenue Accountability	/ 15
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Total:	/ 90

Score Interpretation

0–30: Foundation Risk

Your marketing system may not be ready to scale AI, automation, or personalization. Focus first on data quality, governance, lifecycle definitions, messaging clarity, and reporting trust.

Priority question: What needs to be fixed before automation or AI can be trusted?

31–60: Operational Gaps

You have some building blocks in place, but gaps may be limiting performance, creating friction between teams, or producing inconsistent buyer experiences.

Priority question: Which gaps are creating the most confusion: rework or missed revenue opportunities?

61–78: Growth-Ready, With Refinement Needed

Your foundation is relatively strong, but you will need to look for opportunities to improve orchestration, governance, personalization, AI use cases, and executive reporting.

Priority question: Where can stronger alignment, clearer ownership, or better data turn existing activity into more measurable growth?

79–90: Trusted Revenue System

Your marketing system is well-positioned to support AI-driven automation, personalization, and revenue accountability. Continue optimizing through governance, experimentation, cross-functional alignment, and regular review.

Priority question: How can AI and automation help scale what is already working without creating unnecessary complexity or risk?