

A DIAGNOSTIC FOR B2B MARKETING LEADERS

# The AI-First Marketing Org Readiness Scorecard

A 20-question self-assessment that tells you where you actually stand on AI readiness, and what to do in the next 90 days.

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20

Questions

5

Dimensions

8 min

To complete

By

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# Before you begin

This scorecard works best when run as a team conversation, not solo. Different people see different parts of the org. Plan 30 minutes with your CMO, head of marketing operations, and at least one senior marketer. Disagree out loud. The disagreement is the data.

1

## Answer for the marketing org as it exists today

Not as you wish it existed. Not as the deck says it does. The version that actually shows up on Tuesday morning.

2

## If you are not sure, that is itself the answer

Pick "Not started" when you cannot confidently say it is in place. Reaching for the higher score because you think you should is how scorecards lie.

3

## Score each question 0-3 using the rubric below

Add up the four scores per category. Add up the five categories at the end. Match your total to the stage definitions on the last page.

4

## Use the result to decide your next 90 days

Each stage has three concrete next steps. Do them in the order listed. Do not skip ahead. Stage 2 work breaks if Stage 1 work was not done.

### The scoring rubric

0

#### Not started

Not at all in place

1

#### Beginning

Just thinking about it

2

#### Partial

Some of this exists

3

#### Operational

Implemented & working

# Score yourself

Mark the box that matches your honest answer. Total each category.

## 1 Workflow Foundation

Are your processes documented and clear enough for AI to plug into?

- |   |  |                       |                       |                       |                       |
|---|--|-----------------------|-----------------------|-----------------------|-----------------------|
| 1 | Our most important marketing workflows are documented end-to-end (not just in someone's head). | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 2 | We have clear handoff points and SLAs between marketing and sales.                             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 3 | We have mapped which steps in our workflows require human judgment vs. could be automated.     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 4 | Our team can articulate the "why" behind each step in our top workflows.                       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Workflow Foundation subtotal (max 12)

\_\_ / 12

## 2 Knowledge Base Health

Can an AI agent retrieve from a single source of truth?

- |   |   |                       |                       |                       |                       |
|---|---|-----------------------|-----------------------|-----------------------|-----------------------|
| 5 | We have a single source of truth for marketing assets (positioning, brand, pricing, ICP).       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 6 | Our knowledge base is reviewed and updated at least quarterly.                                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 7 | A new team member can find the latest version of any key marketing document in under 5 minutes. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 8 | There is a designated owner for the marketing knowledge base.                                   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Knowledge Base Health subtotal (max 12)

\_\_ / 12

3

## Org Structure & Roles

Is your team structured to actually adopt AI?

- 9 Someone on our marketing team has explicit authority over AI adoption decisions.  0  1  2  3
- 10 We have defined how AI agents will be "managed" (uptime, escalations, exceptions).  0  1  2  3
- 11 Senior marketing roles in our hiring process are screened for AI literacy.  0  1  2  3
- 12 We have budget allocated specifically for marketing AI/orchestration in 2026.  0  1  2  3

Org Structure & Roles subtotal (max 12)

\_\_ / 12

4

## Data & Stack Integration

Can your stack support AI without breaking?

- 13 Our CRM and primary marketing tools are cleanly integrated with our data warehouse.  0  1  2  3
- 14 Our team trusts the data quality enough to act on it without manual verification.  0  1  2  3
- 15 We have audited what AI capabilities our existing stack already includes (and aren't using).  0  1  2  3
- 16 Our content is tagged with structured data/schema for AI and AEO discoverability.  0  1  2  3

Data & Stack Integration subtotal (max 12)

\_\_ / 12

- 
- 17 Our marketing team has received practical AI training (not just policy training) in the last 6 months.  0  1  2  3
- 
- 18 People on our team experiment with AI tools and share results internally.  0  1  2  3
- 
- 19 Leadership has communicated a clear stance on AI in marketing (not just "we're exploring it").  0  1  2  3
- 
- 20 We measure success metrics that AI agents can actually move (e.g. velocity, throughput) in addition to traditional MQL/SQL.  0  1  2  3
- 

Team &amp; Culture subtotal (max 12)

 / 12

# Add it up

Sum your five subtotals to get your overall score, then match it to the stage that fits.

1. Workflow Foundation	/ 12
2. Knowledge Base Health	/ 12
3. Org Structure & Roles	/ 12
4. Data & Stack Integration	/ 12
5. Team & Culture	/ 12
<b>TOTAL SCORE</b>	<b>/ 60</b>

## Match your score to a stage

### Stage 1: Scattered

0 – 15 POINTS

You are at the beginning. The good news: this is the right time to design the foundation correctly, instead of fixing it later. **Do NOT hire an AI Transformation Lead yet** — they will fail here.

- **Document one workflow end-to-end.** Pick the workflow that touches the most people. Map every step, every system, every handoff.
- **Designate a knowledge base owner.** Even if you do not yet have a knowledge base, name the person who will own it.
- **Educate leadership before tooling.** One workshop with CMO, CRO, and Head of Ops on what AI agents actually are vs. what vendors are selling.

## Stage 2: Foundational

16 – 30 POINTS

You are closer to AI-ready than you think. The structure is there, but the integration and ownership are weak. Six to nine months of focused work moves you to operational.

- **Clean up CRM-to-warehouse integrations.** The top 3 data flows that everything else depends on.
- **Scope an AI Transformation Lead role.** Not yet ready to hire — ready to define. Write the JD, the success metrics, the 90-day plan.
- **Pilot one agent use case.** Lowest-risk option: internal knowledge retrieval over your existing knowledge base.

## Stage 3: Operational

31 – 45 POINTS

You are ready to deploy. The foundation is solid; what is missing is the orchestration layer and dedicated ownership. The next quarter is about hiring and architecting, not strategizing.

- **Hire the AI Transformation Lead now.** Market is heating up monthly. Define, post, and close in 60 days.
- **Stand up the orchestration layer.** LangGraph, n8n, Make with AI handlers, or custom code via Anthropic's MCP.
- **Define your KPI shift.** Add pipeline velocity, agent uptime, throughput per FTE, and AEO citation rate to your monthly dashboard.

## Stage 4: Optimized

46 – 60 POINTS

You are in the leading 5-10% of B2B marketing orgs on this dimension. The job now is not to do more, but to compound the lead. Most companies in this stage stall by adding tools instead of operating the ones they have.

- **Move from agents to agentic systems.** Multi-step systems where one agent orchestrates several. Few teams have done this in production.
- **Codify your playbook externally.** Document it. Publish it. Become the reference org others benchmark against.
- **Audit for over-engineering.** Quarterly: which agents are no longer earning their compute cost? Which integrations now duplicate?

## Want help running these next steps?

I help B2B marketing teams architect this transition without the 6-month false start. If you want to talk through what your specific path looks like, here's where to find me.

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