

AI Readiness: 5 Strategic Assessments for Business Owners & Leaders

Below are five higher order assessments that leaders could explore before deciding whether to introduce new capabilities into their business and especially their marketing function.

1. Strategic Maturity Assessment

This is not about having a roadmap. It is about your ability to translate strategy into disciplined execution.

Ask:

- Do we have a clear value proposition that guides commercial and marketing decisions?
- Is our growth model explicit? (Market expansion, product-led, partner-led or account-centric)
- Do we have the ability to translate strategic priorities into predictable quarterly plans?

If the answer is no then new tools will only accelerate strategic drift.

2. Operating Model Readiness

Introducing any intelligent tools requires an operating model that can handle change.

Leaders should review:

- Decision velocity: Are decisions made quickly by empowered teams or slowed down by unclear governance?
- Cross-functional alignment: Are sales, marketing and service teams aligned on the same definitions, shared metrics and shared narratives?
- System coherence: Are your CRM, CMS, analytics and product systems connected or stitched together with spreadsheets and manual exports?

If the operating model is fragmented any new capability will deepen the gaps. They will expose and widen cracks.

3. Data Quality and Commercial Integrity

Data is a core commercial asset that either accelerates growth or restricts it.

Advanced organisations look at:

- Signal quality: Do we have data that provides meaningful behavioural signals or only vanity KPIs?
- Commercial traceability: Can we reliably track how marketing activity influences revenue cycles?
- Data lineage: Do we understand where data originates, how it moves through the organisation and who owns its quality?



This is where many SMBs incorrectly assume that they are “digital” while still relying on spreadsheets and manual reconciliation. Without credible data discipline no new capability will perform.

4. Team Strength and Strategic Headroom

The question is rarely about skills alone. It is about the cognitive load that your team is already carrying.

Consider:

- Are our teams operating reactively or with headroom for strategic thinking?
- Do they have the time and mental space to adopt and integrate a new capability?
- Are roles clear enough that new tools enhance rather than confuse responsibilities?

If a team is already at capacity, adding AI will drain energy not drive growth. You need capacity before capability.

5. Customer Experience Coherence

No new marketing capability should be introduced until the organisation has fully evaluated where the additional value is created for customers.

Leaders should explore:

- Are our customer journeys intentionally shaped or just observed?
- Where are the friction points and are they clearly owned?
- Is the customer experience post sales aligned with the value delivered pre-sale?

If customer experience is inconsistent then introducing new tools will simply automate inconsistency.

