

Revenue AI Readiness Snapshot

A 5-minute executive worksheet to pinpoint where your GTM motion is stuck — and what to do first.

Executive diagnostic • Founder / CRO / CMO / RevOps • Takes 5 minutes

1 | WHAT FEELS MOST TRUE RIGHT NOW?

Check the 1–2 statements that feel most true right now.

- ☐ We're getting activity, but not enough qualified pipeline.
 ☐ Engagement is happening, but the right accounts aren't getting acted on fast enough.
 ☐ Signals are scattered, so prioritization still feels subjective.
- ☐ Core data, ownership, or lifecycle stages aren't trusted trusted enough to move fast.
 ☐ One repeated workflow is still too manual and too slow.
 ☐ Leadership has too many asks and no clear first move.

2 | SCORE YOUR READINESS

Rate each statement 1–5 · 1 = unclear / not true · 3 = partly true · 5 = clear / trusted / owned

01

Commercial bottleneck clarity

We can name exactly where revenue is getting stuck. Score ____ /5

Leaders agree on the first commercial problem to solve. Score ____ /5

Lens total ____ /10

02

Data & system trust

Teams trust the core data, ownership, and lifecycle stages enough to act. Score ____ /5

Different teams can see the same account and the same basic reality. Score ____ /5

Lens total ____ /10

03

Workflow fit

We can point to one repeatable, high-friction workflow worth improving first. Score ____ /5

That workflow has clear inputs, outputs, and manageable risk. Score ____ /5

Lens total ____ /10

04

Ownership & adoption

One owner can sponsor and run the first motion. Score ____ /5

Success, QA, guardrails, and adoption are defined well enough to launch. Score ____ /5

Lens total ____ /10

3 | YOUR READOUT

Your lowest score usually points to the first constraint. If two are tied, use the symptoms above to break the tie.

Your smartest starting path:

Signal & visibility

Trust layer

High-friction workflow

Alignment

Pick the one path that gives you the clearest, most trustworthy first move.

What to Do First in the Next 90 Days

Use your starting path below to narrow the first motion, avoid tool sprawl, and create a win your team can trust.

01 Fix signal & visibility

Start here if: teams keep arguing about which accounts matter, what signals count, or who should follow up.

Do first: define signal sources, thresholds, shared account view, and routing rules.

Hold off on: fancy AI scoring layers or autonomous outreach.

90-day win: clearer prioritization and faster follow-up.

02 Strengthen the trust layer

Start here if: "that data is off" keeps showing up in pipeline reviews.

Do first: tighten the few fields, definitions, ownership rules, and lifecycle stages that drive action.

Hold off on: putting more AI on top of messy data.

90-day win: higher confidence in routing, attribution, and personalization.

03 Improve one workflow

Start here if: one repeated manual process is clearly wasting time.

Do first: pick one workflow and define the input, output, quality bar, and human check.

Hold off on: trying to automate half the funnel.

90-day win: measurable time saved and more consistent execution.

04 Align priorities & ownership

Start here if: there are too many asks, too many pilots, and no single first move.

Do first: align on the bottleneck, first motion, owner, success measure, and what is not being done yet.

Hold off on: parallel experiments with fuzzy accountability.

90-day win: clearer sequence and fewer disconnected initiatives.

COMMIT THE FIRST 90-DAY MOVE

Pick one first motion — and be explicit about what you are not doing yet.

Our first motion is _____ Owner _____

By day 90, success looks like _____

What we are not doing yet _____