MARKETING BY DEEPAK CONSULTING GROUP

AI Agent Readiness Scorecard

For Marketing Operations & Revenue Teams

Why this scorecard exists

In 2026, marketing teams are rapidly adding AI agents for enrichment, scoring, routing, and follow-up. Teams that succeed treat agents as an execution layer built on clean data and clear processes. Teams that struggle usually discover too late that their foundations were not ready.

This scorecard gives you a practical baseline across four areas before you invest significant time or budget into agentic workflows. It is written for Marketing Ops, RevOps, and Demand Gen leaders who want an honest assessment rather than a sales pitch.

How to use this scorecard

For each of the 12 statements, give yourself a score of 0, 1, or 2:

0 = Not true / We have not started or it is actively broken
1 = Partially true / Started but incomplete or inconsistent
2 = Fully true / Reliable and documented enough to support agents

Be honest. An accurate baseline is more valuable than a high score.
Maximum total: 24 points.

The four areas covered

1. Data Foundation	Quality, completeness, and ownership of the data agents will use
2. Process & Ownership	Documented workflows and clear human accountability
3. Integration & Stack	How cleanly your tools can exchange data with agents and each other
4. Measurement & Governance	Ability to monitor, correct, and improve agent behavior over time

Section 1 · Data Foundation

1. Our core marketing and CRM data (contacts, companies, lifecycle stages) is reasonably clean, with low duplicate rates and consistent field usage.

Your score: 0 1 2

2. We have a documented owner or process for ongoing data hygiene (enrichment rules, deduplication, field standards).

Your score: 0 1 2

3. Key properties that agents would rely on (industry, seniority, intent signals, product interest, etc.) are populated for the majority of active records.

Your score: 0 1 2

Section 2 · Process & Ownership

4. Critical marketing processes (lead routing, scoring changes, lifecycle transitions, campaign launches) are documented so a new team member could follow them.

Your score: 0 1 2

5. There is a clear human owner for each major workflow that an agent might touch (who reviews exceptions, who approves changes).

Your score: 0 1 2

6. We have a simple way to pause or roll back an automated process if something goes wrong, without needing engineering support.

Your score: 0 1 2

Section 3 · Integration & Stack

7. Our core systems (CRM, marketing automation, enrichment, data warehouse) can exchange data reliably through APIs, webhooks, or native connectors.

Your score: 0 1 2

8. We know which tools currently own which data and processes, and where manual workarounds still exist between systems.

Your score: 0 1 2

9. We have at least one environment or sandbox where we can test new automations or agents without risking production data or live campaigns.

Your score: 0 1 2

Section 4 · Measurement & Governance

10. We can currently measure the impact of our existing automations (time saved, error rates, conversion lift, or pipeline influence).

Your score: 0 1 2

11. There is a lightweight review cadence (weekly or monthly) for checking whether automated processes are still behaving as expected.

Your score: 0 1 2

12. We have basic guardrails defined for what an agent is and is not allowed to do (for example: can update certain fields, cannot send external email).

Your score: 0 1 2

Your Score & What It Means

Add up the scores from all 12 statements. Maximum possible score is 24.

0 – 8 Not Ready Yet

Focus first on data hygiene and basic process documentation. Adding agents now will usually amplify existing problems rather than solve them.

9 – 15 Building Foundations

Some pieces are in place. Prioritize the lowest scoring sections before launching any production agents. Keep early experiments tightly scoped.

16 – 20 Ready to Pilot

You have enough structure for controlled experiments. Start with lower risk use cases such as enrichment or internal alerts and measure carefully.

21 – 24 Ready to Scale

Foundations look solid. You can expand agent usage with confidence as long as review cadence and guardrails stay active.

What to do next

If your score is lower than expected, that is useful information. Most teams only discover gaps after an agent has already created noise or incorrect records.

If you want a second set of eyes on the gaps this scorecard highlighted, or practical help building the missing foundations, you can reach out at marketingbydeepak.com/contact. No pitch required. Just a straightforward conversation about where the leverage is.

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