



• AI-NATIVE REVENUE ARCHITECTURE

Revenue AI Readiness

Scorecard

A self-assessment framework to evaluate your revenue operations' readiness for AI.

6 Dimensions • **30 Assessment Items** • **10–15 Minutes**

COMPANY

ASSESSED BY

DATE

ARR STAGE

clearpath-revenue.com • hello@clearpath-revenue.com



How to Use This Scorecard

1. Rate your organization on each item using the 1–5 scale below. Be honest, not aspirational.
2. This assessment works best when completed by 2–3 stakeholders independently, then compared.
3. Your total score reveals your overall AI-readiness. Dimension scores reveal where to focus first.

Scoring Scale

1	Not Started	No capability or process exists in this area.
2	Ad Hoc	Some informal efforts, but inconsistent and undocumented.
3	Defined	Process exists and is documented, but not consistently followed or measured.
4	Managed	Process is consistent, measured, and actively improved. Data supports decisions.
5	Optimized	Fully mature, continuously improving, AI-ready or AI-enhanced.

Interpreting Your Total Score

30–74	Foundation Phase	Your RevOps needs structural work before AI will create value. Focus on data quality, definitions, and process consistency first.
75–109	Ready to Build	You have the foundations. Strategic AI implementation will create real leverage. Start with high-ROI quick wins.
110–150	Ready to Accelerate	Strong foundation in place. Focus on advanced AI — predictive models, agent workflows, and compounding intelligence.



ASSESSMENT

01 Data Foundation

Is your data infrastructure ready for AI to learn from?

CRM Data Quality

Contact, account, and deal records are complete, deduplicated, and consistently formatted. Data governance processes are active.

1 2 3 4 5

Field Architecture

CRM fields are well-defined, consistently used, and aligned with how your business actually operates. No orphan or contradictory fields.

1 2 3 4 5

Data Governance

Clear ownership of data quality. Documented standards for data entry. Regular audits and cleanup cadence.

1 2 3 4 5

Integration Integrity

Data flows cleanly between systems (CRM, MAP, CS platform, billing). No manual CSV imports for critical data.

1 2 3 4 5

Historical Data Depth

You have 12+ months of clean historical data on pipeline, deals, customer interactions, and outcomes.

1 2 3 4 5

Dimension Score: _____ / 25

02 Pipeline Intelligence

Can your pipeline data support intelligent decision-making?

Stage Definitions & Exit Criteria

Pipeline stages have clear, documented definitions with objective exit criteria. The team consistently applies them.

1 2 3 4 5

Forecast Methodology

Forecasting follows a defined methodology (not just gut feel). Historical accuracy is tracked. Bias is identified and corrected.

1 2 3 4 5

Signal Quality

Your pipeline generates real buying signals — not just activity data. You can distinguish high-intent from noise.

1 2 3 4 5

Deal Velocity Tracking

You measure and understand how fast deals move through stages, where they stall, and why. Bottlenecks are visible.

1 2 3 4 5

Win/Loss Analysis

Systematic analysis of why deals are won and lost. Patterns are identified and fed back into process improvements.

1 2 3 4 5



Dimension Score: _____ / 25

03 Automation Maturity

How much of your revenue operations runs on autopilot vs. manual effort?

Lead Routing & Response

Inbound leads are automatically scored, routed, and responded to. No leads sit unassigned for more than 1 hour.

1 2 3 4 5

Workflow Automation

Key processes (deal stage updates, task creation, notifications, follow-up sequences) are automated in your CRM.

1 2 3 4 5

Reporting Automation

Dashboards and reports update automatically. Leadership doesn't wait for someone to pull numbers manually.

1 2 3 4 5

Alert Systems

Automated alerts exist for stalled deals, at-risk renewals, missing data, and other exception conditions.

1 2 3 4 5

Process Documentation

Automated workflows are documented, maintained, and understood by more than one person on the team.

1 2 3 4 5

Dimension Score: _____ / 25

04 GTM Alignment

Do your revenue teams operate as one system or separate silos?

Shared Definitions

Marketing, Sales, and CS agree on definitions: MQL, SQL, opportunity, customer health, churn. No ambiguity.

1 2 3 4 5

Lead Handoff Process

Handoffs between Marketing and Sales (and Sales and CS) are defined, measured, and optimized. Nothing falls through cracks.

1 2 3 4 5

Cross-Functional Visibility

Each team can see what the others are doing. Sales knows what marketing is running. CS knows deal context.

1 2 3 4 5

KPI Alignment

Team KPIs ladder up to shared revenue goals. No conflicting incentives between marketing, sales, and CS.

1 2 3 4 5

Operating Cadence

Regular cross-functional reviews (pipeline, forecast, campaign performance, customer health) happen and drive decisions.

1 2 3 4 5



Dimension Score: _____ / 25

05 Customer Health Visibility

Can you predict retention and expansion before it's too late?

Health Score Methodology

A defined customer health score exists based on usage, engagement, support, and sentiment — not just CSM gut feel.

1 2 3 4 5

Churn Signal Detection

Early warning indicators for churn are identified, tracked, and acted upon before renewal conversations.

1 2 3 4 5

Expansion Triggers

Upsell and expansion signals are identified and routed to the right team at the right time.

1 2 3 4 5

Onboarding Measurement

Time-to-value and onboarding completion are tracked. Slow onboarding triggers intervention.

1 2 3 4 5

NRR Tracking & Analysis

Net Revenue Retention is tracked by segment and cohort. You understand what drives expansion vs. contraction.

1 2 3 4 5

Dimension Score: _____ / 25

06 AI Infrastructure Readiness

Is your organization prepared to deploy and benefit from AI in revenue operations?

Tech Stack AI-Compatibility

Your tools have APIs, integrations, and data export capabilities that support AI/ML workloads.

1 2 3 4 5

Team AI Literacy

Revenue team members understand basic AI concepts and can identify where AI could improve their workflows.

1 2 3 4 5

Use Case Identification

You've identified specific, high-value use cases for AI in your RevOps (not just 'we should use AI').

1 2 3 4 5

Data Privacy & Governance

You have policies for how customer data can be used in AI models. Compliance and privacy are addressed.

1 2 3 4 5

Executive Sponsorship

Leadership actively supports AI adoption in revenue operations with budget, time, and strategic priority.

1 2 3 4 5



Dimension Score: _____ / 25



Your *Results*

SCORE SUMMARY

01	Data Foundation	_____ / 25
02	Pipeline Intelligence	_____ / 25
03	Automation Maturity	_____ / 25
04	GTM Alignment	_____ / 25
05	Customer Health Visibility	_____ / 25
06	AI Infrastructure Readiness	_____ / 25
TOTAL SCORE		_____ / 150

YOUR PRIORITY ACTIONS

Based on your scores, identify your 2 lowest-scoring dimensions. These are your priority focus areas.
Write your top 3 action items:

- 1.
 - 2.
 - 3.
-

Want a deeper assessment with *expert analysis?*

ClearPath's Revenue AI Readiness Assessment takes this scorecard to the next level: a 2–3 week operator-grade diagnostic with a prioritized transformation roadmap.

Book a discovery call → clearpath-revenue.com • 30 minutes. No deck. No pressure.