



Current State & Technology Stack

1. What is your organization's current level of AI implementation in sales and marketing?
(None, basic tools, moderate adoption, advanced implementation)
2. Which marketing and sales technologies are you currently using?
(CRM, marketing automation, analytics platforms, chatbots, etc.)
3. How integrated are your sales and marketing technology systems?
4. What is your current data collection and analysis capability across the customer journey?
5. Do you have dedicated personnel with AI/ML expertise in your sales or marketing teams?

Strategic Readiness

1. Has leadership defined clear AI objectives for sales and marketing growth?
2. What are your primary sales and marketing challenges that AI might address?
(Lead generation, customer segmentation, personalization, sales forecasting, content creation, campaign optimization, etc.)
3. How do you currently measure sales and marketing performance, and what metrics would you want AI to impact?
4. What is your organization's comfort level with AI-driven customer interactions?
5. How important is marketing and sales efficiency versus human touch in your industry?

Data & Customer Intelligence

1. What customer data do you currently collect?
(Demographics, behavioral, transactional, engagement, social media, etc.)
2. How comprehensive is your customer journey mapping and attribution modeling?
3. What is the quality and completeness of your CRM data?
4. Do you have unified customer profiles across all touchpoints?
5. How do you currently handle data privacy and consent management?

Sales Process & Performance

1. How do you currently identify and prioritize leads?
2. What is your sales forecasting accuracy and methodology?
3. How do you currently personalize sales outreach and follow-up?
4. What tools do you use for sales pipeline management and opportunity scoring?
5. How consistent are your sales processes across different teams or regions?

Marketing Operations

1. How do you currently segment your audience and personalize campaigns?
2. What is your approach to content creation and optimization?
3. How do you measure and optimize campaign performance across channels?
4. What marketing attribution model do you currently use?
5. How do you currently handle marketing qualified lead (MQL) identification and handoff to sales?

Customer Experience & Engagement

1. How do you currently provide customer support and handle inquiries?
2. What personalization capabilities do you have across digital touchpoints?
3. How do you currently analyze customer sentiment and feedback?
4. What is your approach to customer retention and upselling?
5. How do you currently handle omnichannel customer experiences?

Organizational & Skills Assessment

1. How comfortable are your sales and marketing teams with data-driven decision making?
2. What training resources are available for new technology adoption?
3. How does your organization typically approach marketing technology investments?
4. What is your timeline expectation for seeing ROI from AI initiatives in sales and marketing?
5. How collaborative are your sales and marketing teams currently?

Budget & Resource Planning

1. What budget range are you considering for AI initiatives in sales and marketing?
2. Would you prefer to start with specific use cases or broader platform implementation?
3. Do you have preferred marketing technology vendors or integration requirements?
4. What internal resources can be dedicated to AI projects?
5. How do you plan to measure success and ROI of marketing AI implementations?

Compliance & Privacy Considerations

1. What data privacy regulations must your AI implementations comply with? (GDPR, CCPA, etc.)
2. How do you currently handle customer consent and data transparency?
3. What are your brand safety and content compliance requirements?
4. Do you have policies around AI-generated content and automated customer interactions?

Competitive & Market Factors

1. How are your competitors currently using AI in sales and marketing?
2. What customer expectations exist around personalized experiences in your industry?
3. How important is real-time responsiveness in your sales and marketing processes?
4. What seasonal or cyclical factors affect your sales and marketing performance?

This assessment will help your sales and marketing organizations identify their AI readiness, prioritize use cases with the highest impact potential, and develop a roadmap for successful AI implementation that aligns with their customer acquisition and retention goals.

If you would like help in interpreting the results of your assessment, please contact me directly.

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