

GRAPHIC MARKS

AI Marketing Readiness Assessment

A practical 20-question assessment for deciding where AI and automation can actually help your marketing team.

Built for small teams that need clear, practical marketing decisions without unnecessary complexity.

Score each statement 0, 1, or 2. Use 0 for “not in place,” 1 for “partially,” and 2 for “yes / consistently.” The goal is not to maximize AI use. It is to identify where better inputs, workflows, governance, or automation can create useful leverage.

Score Your Readiness

Statement	0	1	2
We have documented priority audiences and marketing goals.	☐	☐	☐
Our core service/program descriptions and brand language are current.	☐	☐	☐
We have examples of writing that represent our preferred voice.	☐	☐	☐
We know which claims, topics, or communications require extra review.	☐	☐	☐
Our team can identify the source used for factual or sensitive content.	☐	☐	☐
We have repeatable marketing tasks that consume time every week.	☐	☐	☐
We can clearly describe what should trigger those workflows.	☐	☐	☐
Our forms, CRM, email, website, and project tools have reasonably clean data.	☐	☐	☐
We know who owns follow-up after a lead, member, donor, or inquiry action.	☐	☐	☐
We have recurring reports that are currently assembled manually.	☐	☐	☐
We have a review process for AI-assisted public content.	☐	☐	☐
Staff understand that AI output can be wrong and must be checked.	☐	☐	☐
We do not put confidential or sensitive information into tools without an approved policy.	☐	☐	☐
We know which decisions must remain human.	☐	☐	☐
We have a person responsible for approving new AI/automation use cases.	☐	☐	☐

Statement	0	1	2
We can measure time saved or errors reduced by a workflow change.	☐	☐	☐
We have at least one repetitive task that could be automated without changing the customer/member experience.	☐	☐	☐
We have content such as reports, webinars, interviews, or FAQs that could be repurposed efficiently.	☐	☐	☐
Our team is willing to document and standardize workflows before automating them.	☐	☐	☐
We would rather improve one useful workflow than launch a large "AI transformation" project.	☐	☐	☐

Interpret Your Score

0-14: Build the foundation

Start with messaging, data hygiene, ownership, and basic workflow documentation before adding more AI tools.

15-27: Good candidates exist

Choose 1-2 low-risk workflows such as drafting, summarizing, repurposing, routing, or reporting and test them with human review.

28-40: Ready to scale selectively

You likely have enough process maturity to connect AI with CRM, website, email, content, and reporting workflows while keeping governance and review in place.

Choose Your First Three Use Cases

1. **Task / workflow:** _____
 Current time/cost: _____ Desired outcome: _____
 Human review point: _____
2. **Task / workflow:** _____
 Current time/cost: _____ Desired outcome: _____
 Human review point: _____
3. **Task / workflow:** _____
 Current time/cost: _____ Desired outcome: _____
 Human review point: _____

Good First Automation Targets

- [] **Lead routing** - Summarize and route form submissions to the right person.
- [] **Content repurposing** - Turn approved reports, webinars, or articles into channel-specific drafts.
- [] **Meeting follow-up** - Convert notes into action items and reminders.
- [] **Reporting** - Assemble recurring performance summaries automatically.
- [] **Content workflow** - Move drafts, approvals, metadata, images, and publishing handoffs through a repeatable process.
- [] **CRM hygiene** - Tag, categorize, and enrich contacts based on clear rules.

Your AI Pilot Plan

Use this page to define one small pilot before adding more tools or automations.

Workflow to improve: _____

What happens today: _____

What should happen automatically: _____

Human review / approval point: _____

How we will measure success: _____

Want help choosing the right first workflow?

Graphic Marks helps small teams design practical AI and marketing automation around the systems and processes they already use.

Explore AI + Automation -> graphicmarks.com/contact/