

certinia

AI Readiness: Is Your Infrastructure Built for the Hybrid Workforce?

Quick tests looking at your:



Foundation
& Context



Workforce
Orchestration



Economic
Scalability

The Path from Automation to Autonomy

The services economy is shifting from human-controlled SaaS to **Autonomous AI**. To unlock this tremendous opportunity, leaders must move from a constrained staffing pyramid to a **scalable diamond model** where highly skilled humans work alongside autonomous agents.

However, many are operating blind due to a Franken-stack—a collection of disconnected systems. These silos act as a hidden tax that sabotages your AI strategy because AI fails when it cannot see the full picture. Use this assessment to evaluate whether your foundation is structurally designed for this new workforce or if fragmentation is quietly creating an automation limit.

TEST 01

Foundation & Context

Can your data support autonomous agents without constant human intervention?

Check each box that applies to your business

One Customer Record

A core record follows the account from opportunity to advocacy.

Unified Data Foundation

The entire lifecycle—Sell, Staff, Work, Bill, Renew—is on one platform.

Elimination of Shadow IT

You have removed manual spreadsheets used as workarounds.

Integrated Estimating

Quotes are grounded in real-time resource capacity and skills.

Platform-Native AI

Agents have secure, real-time access to records for complex workflows.

Workforce Orchestration

Can you coordinate humans and agents without adding administrative friction?

Check each box that applies to your business

Automated Project Creation

“Closed-Won” deals automatically trigger projects and budgets.

Autonomous Agent Deployment

Agents handle repetitive tasks like resource matching.

Demand-Side Resourcing

Planning is optimized by aligning directly with the sales pipeline.

Open Interoperability

Your strategy uses standards like MCP for future-proofing.

Role-Based Workflows

The system distinguishes between tasks for human experts and those for autonomous agents.

Economic Scalability

Does your stack allow you to grow revenue without bloating headcount?

Check each box that applies to your business

Margin-Driven Decisions

AI provides real-time visibility into the margin impact of staffing changes before they happen.

Continuous Context

Information flows from Sales to Success without “blind handoffs” or manual re-entry.

Live Status Reporting

Executive health summaries are driven by structured data rather than manual aggregation.

Predictive Forecasting

Your system uses historical and real-time data to forecast revenue and retention with high confidence.

Scalable Governance

Security and compliance are enforced through a single platform, eliminating external data risks.

Your Score and What it Means

For every checked boxed you gain 1 point. Add up all your points and this will give you a total score out of a possible 15.

If your score is below 13, the opportunity is structural. A focused architecture review can pinpoint where context breaks today and identify the changes that will have the fastest impact on your bottom line.



13 to 15

The Unified Foundation

You have the connected context required for a human-agent workforce. AI can scale your experts and handle execution without adding friction.



8 to 12

Partial Journey Alignment

You are paying a moderate “Franken-stack tax.” Your AI initiatives will likely struggle with data accuracy, requiring manual coordination to bridge the gaps.



0 to 7

Fragmented Journey, Reactive Retention

Your current infrastructure is actively working against your AI strategy. You are likely scaling with headcount and meetings rather than technology.

Ready to overcome
the Franken-stack tax?

Schedule a time >

certinia