



AI READINESS ASSESSMENT

Is Your Customer Journey Built to Protect Net Revenue Retention (NRR)?

Quick tests looking at your:



Journey
Continuity



Journey
Orchestration



Monetization
& Expansion

certinia

Introduction

Predictable revenue is harder to hold onto and more costly to replace. That is why **Net Revenue Retention (NRR)** has become one of the clearest signals of whether your customer journey actually works.

SPI's 2025 research reflects the reality that many services leaders and customer leaders alike already feel. AI's impact on client retention is still modest (2.98 out of 5, up from 2.88), and data quality remains the top concern (4.11 out of 5). In other words, AI progress is real, but retention does not improve unless the business can carry a clean, connected context across the full journey.

When your GTM engine—from Sales and Marketing, to Services and Finance, to Customer Success and Support—all operate in separate systems, context breaks down. Expectations get missed. Responses slow down. Value shows up late. Most retention programs fail for one reason: the business cannot carry a single, connected customer story from the first touchpoint through renewal and advocacy.

AI does not fail because it lacks intelligence. It fails when it cannot see the full picture. If customer, delivery, and financial data live in different places, AI cannot give reliable answers or trigger the right actions. This assessment helps you see where your setup supports NRR and where it quietly creates churn.

This assessment evaluates whether your customer journey is structurally designed to protect and grow NRR — or whether fragmentation is quietly creating churn..

The Cost of Fragmentation.

When your customer journey runs across disconnected systems, the impact shows up in familiar ways:



NRR leakage

Customer context drops during handoffs. Risks surface late. Expansion chances slip by. Renewal conversations start with assumptions instead of proof.



The integration burden

Fragile integrations create delays, exceptions, and competing versions of the truth. When teams like Finance and Support must manually reconcile the customer story in spreadsheets, data privacy and security are compromised.



An automation limit

You cannot scale customer motions with automation or AI when workflows and data are split across systems. You end up scaling with headcount, meetings, and follow-ups.

Get AI-ready with the right foundation

Your path from automation to autonomy with Certinia AI

[Find out more](#)

TEST 01

Customer Journey Continuity

Can your organization carry the customer journey forward without breaking context?

NRR suffers when the journey resets at every handoff.

Check each box that applies to your business

One customer record from start to finish

The same core record follows the account from opportunity to delivery, support, renewal, and advocacy.

What was sold flows directly into execution

Scope, pricing, assumptions, success metrics, and stakeholders are structured and visible beyond Sales.

Changes during delivery update the journey automatically

Scope shifts, timeline changes, and commercial adjustments flow to Customer Success and Finance without manual reconciliation.

Operational and financial signals remain aligned

Revenue, billing, margin, and utilization reflect real-time delivery progress.

Customer health reflects lifecycle reality

Health indicators incorporate execution status, adoption, contract position, and billing exposure.

Clear ownership of data quality and governance

Field definitions and standards are consistent across teams, preventing lifecycle disconnects

Journey Orchestration

Can you coordinate execution across the lifecycle without adding friction?

Retention improves when the journey operates as a system — not a series of escalations

Check each box that applies to your business

Lifecycle handoffs are standardized and measurable

Sales → Services → Success transitions follow defined workflows and require the necessary context.

Risk signals trigger structured action

Delivery delays, scope creep, low adoption, or billing issues automatically create tasks and clear ownership.

Renewal planning is tied to execution progress

Retention discussions reflect value delivered — not just contract dates.

Expansion signals surface before renewal

Usage trends, value milestones, and scope gaps identify growth opportunities early.

Status reporting is generated from live systems

Health summaries and executive updates are driven by structured data, not manual aggregation

Leadership sees the full lifecycle in one view

Pipeline, delivery health, retention risk, and margin performance are connected.

Monetization and Expansion

Does the journey consistently translate value delivered into profitable growth?.

NRR protection is incomplete without margin discipline and expansion visibility.

Check each box that applies to your business

Delivery progress drives billing and revenue recognition directly

Financial systems reflect operational reality without spreadsheet reconciliation.

Margin visibility exists before and during execution

Teams understand project economics early enough to adjust staffing or scope.

Revenue leakage is surfaced early

Unbilled work, missed milestones, and scope gaps are flagged automatically with ownership.

Renewals are grounded in documented outcomes achieved

Conversations are tied to measurable value delivered across the lifecycle.

Finance and Customer teams operate from shared retention signals

Forecast movement aligns with delivery health and customer behavior.

Leaders can clearly explain NRR movement

The organization can answer, “Why did NRR change?” using a connected lifecycle view.

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 18.

Your total score shows how ready your customer journey is to protect and grow NRR with automation and AI. It highlights whether your biggest constraint is data, orchestration, or financial connectivity, and where to focus first.



15 to 18

Ready for AI-supported retention

You have connected context across the journey. Automation and AI can surface risk earlier, support consistent execution, and scale without adding friction.

Next step? Pick one or two workflows you can safely automate now, such as renewal risk signals, delivery health summaries, value milestone tracking, or billing exception routing.



9 to 14

Partial Journey Alignment

You have continuity in some stages, but the journey breaks at key transitions.

NRR protection depends on manual coordination.

Next step? Identify where lifecycle context first fractures — Sale → Delivery; Delivery → Success; or Delivery → Finance? Repair that structural break..



0 to 8

Fragmented Journey, Reactive Retention

The lifecycle operates in silos. Retention relies on meetings, spreadsheets, and heroic effort. Risk surfaces late. Expansion is inconsistent. Margin leakage is difficult to trace.

Next step? Consolidate core customer, delivery, and financial data before layering automation or AI.

The Bottom Line.

NRR is not improved by isolated tools or departmental optimization.

It improves when the **customer journey is architected as a single, connected system** — where scope, execution, financial performance, and renewal planning remain continuously aligned.

If your score is below 15, the opportunity is structural.

A focused architecture review can pinpoint where lifecycle disconnects are quietly eroding NRR — and identify the two or three changes that will have the fastest impact on retention, margin, and expansion.

How can certinia help you?



Book an architecture review

Schedule an architecture review to pinpoint where customer context breaks today and which two or three changes will have the fastest impact on NRR.

[Schedule a time >](#)

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