



AI READINESS ASSESSMENT

Laying the Foundation for **Effective AI**

A growing business's checklist

A focus on:



Reliable
Data



Margin
Certainty



Scalable
Agility



Connected
Workflow

certin̄ia

The Path from Automation to Autonomy

In the services economy, growth is a double-edged sword. Scaling often introduces complexity, and complexity brings the “Franken-stack Tax”—a hidden drain on profitability caused by disconnected systems and manual reconciliations.

As we enter the era of Autonomous AI, the stakes have changed. AI cannot fix a fragmented foundation; it only accelerates the chaos within it. Before you invest in AI to drive growth, you must ensure your data is architecturally sound. If your CRM, delivery tools, and financials live in separate silos, your AI strategy is not a growth engine—it is a financial liability.

Diagnostic: Identifying Your Franken-stack Risk

Before approving your next digital transformation spend, ask your leadership team these four questions to expose the gaps that will sabotage your AI ROI:



To Sales:

Is our opportunity data flowing into our delivery model without manual intervention, or is AI trying to predict outcomes based on disconnected spreadsheets?



To Operations:

Can we automate resource matching, or is our talent data so fragmented that an AI agent wouldn't know who is actually available?



To Delivery:

If project costs spike today, does our system catch it instantly, or are we waiting for a human to reconcile three different systems at month-end?



To Customer Success:

Do we have a single, unified record of the customer that an AI can analyze to predict renewal risk, or is the truth scattered across the organization?

Architect for Data Integrity

Can your data support autonomous agents without constant human intervention?

Check each box that applies to your business

Eliminate Middleware

You have moved away from disconnected point solutions that require bridges which create data drift.

Single Native Platform

Your entire services lifecycle is anchored on one platform to ensure AI has a clear, real-time view.

Kill Spreadsheet Shadow-Accounting

You have eliminated offline spreadsheets for revenue recognition or resource forecasting that AI cannot see.

Enforce a Single Data Model

Every department uses the same definitions for margin, utilization, and revenue.

Real-Time Sub-ledgers

Your AI-driven forecasts are fed by reliable, real-time data living directly in your sub-ledgers.

Connect the Quote-to-Cash Value Chain

Can you coordinate humans and agents without losing margin during handoffs?

Check each box that applies to your business

Integrated Estimating

Your quotes are grounded in real-world resource costs and availability rather than guesses.

Instant Project Activation

When a deal is won, project and financial structures generate automatically to prevent manual entry errors.

Real-Time Earned Value

You have moved from rearview mirror reporting to live visibility of project progress.

Automated Leakage Prevention

Your foundation automatically flags and prevents the margin loss typical during sales-to-delivery handoffs.

Accelerated Cash Flow

Time-tracking connects directly to billing to eliminate friction that delays invoicing and hampers DSO.

TEST 03

Operationalize AI for Scalable EBITDA

Does your stack allow you to grow revenue faster than headcount?

Check each box that applies to your business

Deploy Autonomous Agents

AI handles high-volume, low-value tasks like timecard chasing or basic resource matching.

Predictive Margin Protection

AI-driven early-warning systems flag projects trending toward unprofitability before the month-end close.

Dynamic Scenario Modeling

You run what-if scenarios on hiring and market shifts using a single, trusted dataset.

Automate Revenue Recognition

Your system handles global compliance standards natively rather than in Excel.

EBITDA Guardrails

AI flags project burn rates instantly before they impact your bottom line.

Your Score and What it Means

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

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.



13 to 15

The Unified Foundation

Your data is clean and your margins are protected. You are ready to lead with AI and scale without adding headcount bloat.



8 to 12

The Integration Trap

You are paying a moderate Franken-stack tax. Your AI initiatives will likely produce unreliable forecasts due to data drift.



0 to 7

Structural Sabotage

Your current systems are actively eroding your EBITDA. Immediate consolidation is required before further growth or AI investment.

The Bottom Line

AI only works when your data does. If your score is below 13, your infrastructure is a financial liability rather than a growth engine. Stop guessing and start growing with certainty.

How can Certinia help you?



Ready to build your unified foundation?

AI only works when your data does. Connect with Certinia today to see how a unified foundation protects your margins and prepares your business for the AI era.

[Get in touch >](#)

certinia