

ASSESSMENT OUTPUT

# Sample Company

Mid-Market B2B SaaS · Marketing Team of 12 · \$8M Martech Stack

DATE

April 2026

FACILITATED BY

Verndale Strategy

SESSION LENGTH

60 minutes

OVERALL READINESS

**24** / 30

RECOMMENDATION

**Activate Now**

PILOT AREA

**Content Throughput**

CONFIDENCE

**High**

RECOMMENDED USE CASE

When **campaign performance shifts materially week-over-week**, the agent should **recommend which content assets to update, test, or retire** so that **experimentation velocity and content throughput improve without adding headcount**.

FIVE-PILLAR READINESS SCORECARD

**Value & Use Case Fit**

High-volume content decisions with visible executive pressure on throughput



5 / 5

**Data & Technical Readiness**

Performance signals available in HubSpot + GA4; minor integration work required



4 / 5

**Workflow & Operating Model Fit**

Content review process is repeatable; approval path is documented and consistent



5 / 5

**Governance & Risk Readiness**

Brand and legal guardrails exist; AI policy in draft, needs finalization before activation



3 / 5

**Enablement & Change Capacity**

Strong VP sponsorship; content team cautiously optimistic, change management plan needed



3 / 5

✓ DO NOW

**Launch content performance agent pilot on top 20 campaign assets**

Signals are accessible, workflow is repeatable, and the business case is clear. Finalize AI usage policy, define human-approval checkpoints, and configure the agent against HubSpot + GA4 data. 30-day goal: agent producing weekly update/test/retire recommendations reviewed by content lead.

→ PLAN NEXT

**Expand to experimentation velocity once pilot proves out**

Once the content agent is operating with human oversight, apply the same signal-to-decision model to A/B test prioritization. The data infrastructure built in phase one will transfer directly. Target 90-day readiness review.

✗ AVOID FOR NOW

**Do not automate personalization decisions or campaign strategy**

Rules for audience segmentation decisions are implicit and politically contested across Marketing and Sales. Automating here before alignment is established creates brand and relationship risk. Revisit after governance framework is in place.

ACTIVATION PATH

● 30 DAYS: CONFIRM READINESS

- Finalize AI usage policy with legal and brand
- Define human-approval checkpoints for content recommendations
- Validate HubSpot + GA4 signal extraction with tech team
- Select 20 pilot assets and assign content lead as agent owner

● 90 DAYS: ACTIVATE & MEASURE

- Agent live with weekly recommendation output
- Measure: decision cycle time, content update rate, team hours freed
- Governance review at 60 days before expanding scope
- Readiness assessment for experimentation velocity use case

BIGGEST BLOCKER

**AI usage policy not yet finalized; blocks activation until resolved**

GOVERNANCE REQUIREMENT

**Human approval on all agent recommendations in pilot phase**

RECOMMENDED NEXT STEP

**Schedule AI policy finalization with legal & brand; this unlocks everything**