Based on your understanding of your organization's strategy, select your level of agreement to the following questions using a five point scale where 1 is strongly agree and 5 is strongly disagree.

1. Long term customer relationships are a strategic priority for our firm

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

2. Developing data driven customer insights is a priority for our firm

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

3. Our customers prefer us to provide products that are personalized to their preferences

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

4. Our customers only prefer low prices

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

5. Our firm faces competition from technology platforms (e.g., Google, Amazon, Facebook, Apple, Microsoft etc).

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

Stage 1: Foundation

6. Please indicate on a scale of 0% to 100% the level of first party data (i.e., data you directly collect about individuals actions that can be attributed to them) you collect for prospects

7. Please indicate on a scale of 0% to 100% the level of first party data (i.e., data you directly collect about individuals actions that can be attributed to them) you collect for customers about:

- Their transactions with you
- Their communications with other customers (i.e., reviews, social media posts etc).

Please state your level of agreement to the following questions based on your understanding of your organization's data structures using a five point scale where 1 is strongly agree and 5 is strongly disagree.

8. Our database can identify each customer's transactions with the firm

  ○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

9. Our database can identify each of the firm actions directed to a customer

  ○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

10. Our database can identify each prospect's transactions with the firm

  ○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

11. Our database can identify each of the firm actions directed to a prospect

  ○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

12. Our database can easily access information about customers

  ○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

13. Our database can easily access information about prospects

  ○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

14. Our firm tracks customer actions over time

  ○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

15. Our firm tracks prospect interactions with the firm over time

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

Stage 2: Experimentation

16. We expect to conduct experiments with AI solutions from third party vendors that personalize our interactions with at least one customer relationship moment (i.e., acquisition, retention, growth, advocacy).

◉ Yes ○ No

If the answer to question 16 is yes, answer the following questions and in reference to the experiments identified in question 16 using a five point scale where 1 is strongly agree and 5 is strongly disagree.

17. We have identified a vendor to develop AI systems that can be tested in the experiments.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

18. We have allocated a budget to conduct the experiments.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

19. We have identified metrics to evaluate the performance of the experiments.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

20. We have approval for running more than one cycle of the experiments.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

Stage 3: Expansion

Please answer yes or no to the following three questions:

21. We have conducted experiments with AI solutions from third party vendors that personalize our interactions with at least one customer relationship moment (i.e., acquisition, retention, growth, advocacy).

◉ Yes ○ No

22. We anticipate developing AI based systems that personalize more aspects of the customer relationship moment that was tested in question 21.

◉ Yes ○ No

23. We anticipate developing AI based systems that personalize customer relationship moment other than the one was tested in question 21.

◉ Yes ○ No

If you answered yes to question 21 and either question 22 or 23, please answer the following questions, using a five point scale where 1 is strongly agree and 5 is strongly disagree.

24. We have identified an AI marketing champion, i.e., an individual responsible for leading the AI marketing initiatives in the firm.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

25. We are investing in talent to develop AI marketing capabilities in-house.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

26. We have compiled a summary of the results from AI experiments to present to top management.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

27. We are developing a budget for building AI marketing capabilities across all customer relationship moments.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

28. We are refining the AI models based on feedback from the experiments.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

29. We have a cross-functional team of c-level executives collaborating to develop AI marketing capabilities.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

30. We are developing an agile methodology to conduct multiple AI marketing experiments

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

31. We are developing an agile methodology to track the performance of AI marketing experiments

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

32. We are developing an agile methodology for conducting marketing experiments quickly, with no experiment lasting longer than one month.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

Stage 4: Transformation

33. We have developed AI based systems that personalize one or more customer relationship moments.

◉ Yes ○ No

34. We anticipate using AI to personalize all moments of the customer relationship (acquisition, retention, growth and advocacy).

◉ Yes ○ No

If you answered yes to questions 33 and 34, please answer the following questions, using a five point scale where 1 is strongly agree and 5 is strongly disagree.

35. We are tracking outcomes from our AI and machine learning experiments so we can prepare a solid business case for top management fund additional AI and machine learning for marketing initiatives.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

36. Our business case will recommend building an AI marketing group in-house

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

37. Our business case will recommend buying an AI marketing firm.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

38. We have identified areas where external vendor solutions are not sufficient to personalize customer relationship moments.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

Stage 5: Monetization

39. We are actively engaged in discussions to develop a new revenue stream that leverages our capabilities in AI marketing from existing customers

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

40. We are actively engaged in discussions to develop a new revenue stream that leverages our capabilities in AI marketing from new customers

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

41. We are actively engaged in discussions to level our AI marketing capabilities to develop a network-based business model that connects our different stakeholders.

○ Strongly Agree ○ Agree ○ Neither Agree nor Disagree ○ Disagree ○ Strongly Disagree

This set of questions should provide the basis of robust discussion for your team. It's ok if you don't march through every single question in order. But during the course of the discussion it should become clear at what point your scores start to decline from all 4's and 5's to 1's and 2's.