

HACKING DEMAND · FREE SCORECARD

AI-Readiness Scorecard

A 12-question self-assessment to see if you're ready to build a HubSpot AI agent, before you burn a credit.

Before you spend a dollar on HubSpot Breeze credits or a custom AI agent, find out whether your team is actually ready to get value from one. Score each statement 0-3 (0 = not true, 1 = partly, 2 = mostly, 3 = fully true). Add it up at the end.

A. Data foundation

Statement	0	1	2	3
Our CRM data is clean enough that we'd trust an AI acting on it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifecycle stages and deal stages have clear, enforced definitions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact and company records are de-duplicated and reasonably complete.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B. Use case clarity

Statement	0	1	2	3
We have a specific, high-volume task in mind (support tickets, lead research, follow-up).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
That task has a repeatable process a human already follows today.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We can measure success (resolution rate, meetings booked, hours saved).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C. Process & ownership

Statement	0	1	2	3
Someone owns the outcome and will review the agent's output weekly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have escalation rules for when the agent should hand off to a human.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership understands AI credits are consumption-priced and has a budget.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

D. Technical & governance

Statement	0	1	2	3
-----------	---	---	---	---

We know which tasks are "native Breeze" vs "needs a custom/Claude agent." ■ ■ ■ ■

We have (or can get) the integrations the agent needs to act. ■ ■ ■ ■

We've written down the guardrails: what the agent must never do. ■ ■ ■ ■

Score it

0-18: Not yet. Fix data + pick one measurable use case first (see our RevOps checklist).

19-30: Ready for a scoped pilot on one use case. Start native, add custom only where Breeze stops.

31-36: Ready to scale. Stand up the agent, instrument it, and expand by proven ROI.

Want this done for you? Hacking Demand builds these systems on your HubSpot, fixed price, live in days. See the plays at hackingdemand.com/hacks or book a free scope call at hackingdemand.com/talk-to-an-expert.