

AIRops Agency

AI REVENUE OPERATIONS · HUBSPOT PLATINUM PARTNER

PORTAL DIAGNOSTIC REPORT

AI Readiness Audit

Prepared for:

INDUSTRY	B2B SaaS · Vertical Software
ORGANIZATION	Mid-Market · Sales-Led GTM
SIZE	~140 employees · \$28M ARR
PLATFORM	HubSpot Sales & Marketing Hub (Professional)



COMPOSITE READINESS SCORE

TIER 2 · STABILIZE

PREPARED BY

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DATE OF ISSUE

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SCOPE

7 Dimensions · 27 Metrics Live portal diagnostic

Executive Summary

This organization has invested in HubSpot but has not yet activated its AI capabilities. Breeze credits remain unused and Breeze Assistant and agents are switched off, while the underlying customer data foundation is not yet structured to support them reliably. The portal scores 47 / 100, placing it in the Stabilize tier. It is **not yet agent-enabled, and the foundation beneath it is not yet agent-ready.**

GOVERNING THESIS

AI does not remediate underlying revenue operations problems. It amplifies them. An agent grounded in corrupted attribution, duplicated records, and undocumented automation will reproduce those defects at machine speed and scale.

47

COMPOSITE SCORE

3

CRITICAL FINDINGS

0%

BREEZE CREDITS USED

7.4%

DUPLICATE DENSITY

WHAT THE SCORE MEANS

The composite reflects a common and correctable position: a capable platform whose AI features have never been switched on, sitting atop three foundational gaps. Lifecycle and attribution data inherited from a prior CRM migration is corrupted, duplicate density runs well above tolerance, and there is no structured grounding content for AI to draw from. None of this is visible while AI is dormant. The moment Breeze Assistant and agents are activated, each gap begins to degrade output quality, and in combination they would make agent deployment a liability rather than a multiplier.

The encouraging finding is that the portal's object architecture and integration layer are fundamentally sound, and because AI has not yet been activated, there is a clean opportunity to remediate the foundation first. A focused engagement can demonstrably move this portal from Stabilize (47) to Optimize (78+) and position it to activate AI deliberately, against clean inputs rather than corrupted ones.

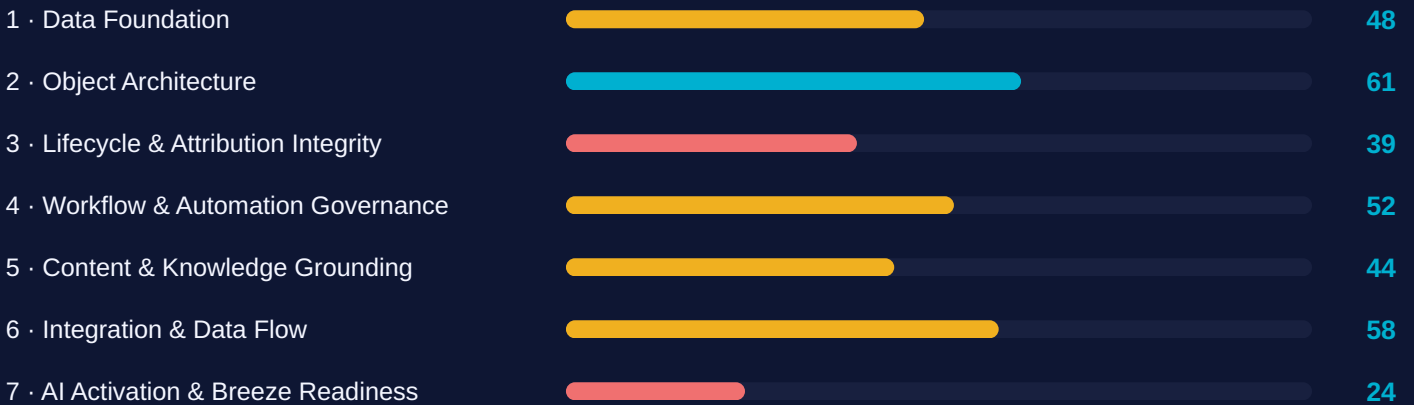
BOTTOM LINE

Do not switch on AI agents against this foundation. Sequence the work the other way: **remediate first, then activate.** The investment compounds: every AI initiative you eventually turn on inherits the quality of the data and governance beneath it.

Readiness Score Overview

The composite is a weighted 0 to 100 score across seven dimensions. Foundational dimensions (Data Foundation, Lifecycle & Attribution) carry greater weight because every downstream capability inherits their integrity. The portal sits at 47, in the Stabilize band.

DIMENSION BREAKDOWN



PATTERN OF NOTE

The portal's paid AI capability is entirely dormant: Dimension 7 scores 24 because Breeze credits sit unused and AI features have never been switched on. Meanwhile the foundational dimensions that determine whether activation would succeed, Lifecycle & Attribution (39) and Content Grounding (44), sit in the gap-to-stabilize range. The opportunity is the sequence: remediate the foundation before the AI surface is ever switched on.

FOUNDATION GAP

0 – 39

STABILIZE

40 – 59

OPTIMIZE

60 – 79

ACTIVATE

80 – 100

Dimension Detail

DIMENSION 01 · 4 METRICS

48

Data Foundation

AT RISK

METRIC	MEASURED	TARGET	STATUS
Contact record completeness	61%	≥ 90%	RISK
Duplicate density (contacts + companies)	7.4%	< 2%	CRITICAL
Required-property enforcement	3 / 14	≥ 12	RISK
Data staleness (no update in 18+ mo.)	34%	< 15%	RISK

Finding. The foundation is unreliable. A duplicate density of 7.4% means agents will encounter conflicting versions of the same customer, and minimal required-property enforcement allows incomplete records to enter the system unchecked. AI grounding quality is capped by this layer.

DIMENSION 02 · 4 METRICS

61

Object Architecture

ON TRACK

METRIC	MEASURED	TARGET	STATUS
Custom object utilization vs. need	2 objects	Scoped	ON TRACK
Association model integrity (labeled)	78%	≥ 90%	RISK
Property sprawl (orphaned / unused)	41%	< 20%	RISK
Pipeline segmentation clarity	3 pipelines	Clear	ON TRACK

Finding. The architecture is fundamentally sound and appropriately scoped. The primary drag is property sprawl: 41% of properties are orphaned or unused, which dilutes the signal-to-noise ratio that AI agents depend on when reading a record. A property rationalization pass will materially lift this dimension.

Lifecycle & Attribution Integrity

CRITICAL

METRIC	MEASURED	TARGET	STATUS
Lifecycle stage progression validity	44%	≥ 85%	CRITICAL
Deal close-date integrity	2,140 deals	0 errors	CRITICAL
Source attribution coverage	38%	≥ 80%	CRITICAL
Lead-status / lifecycle alignment	71%	≥ 95%	RISK

Finding. This is the single largest blocker to AI readiness. A prior CRM migration left 2,140 deals with close dates that predate their creation dates, and reliable original-source attribution exists on only 38% of contacts. Any AI forecasting, scoring, or routing built on this dimension will inherit a corrupted signal and produce confidently wrong outputs.

Workflow & Automation Governance

AT RISK

METRIC	MEASURED	TARGET	STATUS
Workflow documentation coverage	22%	≥ 80%	RISK
Naming-convention adherence	31%	≥ 90%	RISK
Enrollment-logic conflicts	6 workflows	0	ACTION
Orphaned automation (inactive 12+ mo.)	18 / 64	< 5	ACTION

Finding. Automation currently operates as undocumented tribal knowledge. With only 22% of active workflows documented and six carrying overlapping enrollment logic, the layer cannot be safely handed to an AI agent. Governance must be established before automation is delegated.

Content & Knowledge Grounding

AT RISK

METRIC	MEASURED	TARGET	STATUS
Knowledge base coverage & freshness	60%	≥ 85%	RISK
Structured content for AI grounding	None	Library	CRITICAL
Template / snippet standardization	14 (inconsistent)	Governed	RISK
Brand-voice asset availability	Not codified	Codified	ACTION

Finding. Breeze Assistant and agents have no high-quality, structured sources to ground against. Without a canonical product, objection, and brand-voice library, AI-generated content defaults to generic output that erodes trust with prospects and customers alike.

Integration & Data Flow

AT RISK

METRIC	MEASURED	TARGET	STATUS
Connected-system sync integrity	4.1% error	< 1%	RISK
Field-mapping fidelity (validated)	83%	≥ 95%	ON TRACK
API / webhook error rate	~120 / wk	< 20	RISK
System-of-record clarity	Ambiguous	Defined	ACTION

Finding. Integrations function, but no governed system-of-record is defined between the CRM and billing platform for company revenue. Competing sources of truth produce conflicting values that an AI agent will surface and propagate without flagging the conflict.

AI Activation & Breeze Readiness

NOT ACTIVATED

METRIC	MEASURED	TARGET	STATUS
Breeze credit allocation & utilization	0% used (dormant)	Governed use	ACTION
AI feature enablement coverage	Not enabled	Scoped	ACTION
Team enablement & usage governance	No policy	Governed	RISK

Finding. This dimension defines the persona of this audit. The organization has Breeze credits provisioned at no incremental cost, yet they sit entirely unused, and Breeze Assistant and agents have never been switched on. This is not a safety problem today; it is untapped value sitting beside unaddressed risk. The readiness question is what happens at the moment of activation. As the foundational dimensions above show, switching AI on now would amplify upstream defects rather than resolve them. The portal is **not yet agent-enabled, and not yet agent-ready.**

Critical Findings

The three issues that must be resolved before AI is activated.

CRITICAL 01

Corrupted lifecycle and attribution data.

2,140 deals carry invalid close dates and only 38% of contacts have reliable source attribution, both inherited from a prior CRM migration. Remediate before any AI scoring, forecasting, or routing is trusted.

CRITICAL 02

Duplicate density at 7.4%.

Nearly four times the tolerance threshold. Agents will encounter conflicting versions of the same customer and act on whichever they read first. A deduplication and merge-governance pass is the highest-leverage early fix.

CRITICAL 03

No structured grounding content for AI.

There is no canonical product, objection, or brand-voice library for Breeze Assistant and agents to ground against. Until one exists, AI output will be generic and off-brand regardless of model quality.

Priority Remediation Roadmap

A sequenced, fixed-fee path from Stabilize (47) to Optimize (78+). Each phase is designed to be self-contained and to leave the client's team independently capable of maintaining the gains.

PHASE 0

DAYS 1 – 30

Stabilize the Foundation

- Deduplicate contacts and companies, then install merge-governance rules
- Remediate the 2,140 corrupted deal close dates and re-baseline reporting
- Enforce the 14 core required properties at the point of entry
- Define and document the system-of-record for company revenue
- **Quick win:** draw down idle credits on a foundation-safe use case, Breeze Smart Properties that auto-research firmographic and contact fields, which also lifts the Dimension 1 completeness gap

PHASE 1

DAYS 30 – 60

Govern and Document

- Rebuild source attribution on a governed master-lead-source model
- Realign lifecycle stages and lead status to a single validated sequence
- Document active workflows and apply a naming convention
- Resolve the six enrollment-logic conflicts and retire orphaned automation

PHASE 2

DAYS 60 – 90

Ground and Activate

- Build the canonical product, objection, and brand-voice grounding library
- Establish an AI usage policy and prompt standards ahead of first activation
- Activate Breeze Assistant and agents deliberately against the remediated foundation
- Re-score the portal and confirm movement into the Optimize tier

CURRENT STATE

47 · Stabilize

TARGET AFTER ROADMAP

78+ · Optimize

Methodology & About

The AI Readiness Audit is a structured diagnostic of a HubSpot portal's fitness for AI activation. It evaluates whether the underlying data, architecture, and governance can support AI agents reliably, rather than simply whether AI features are switched on.

HOW THE AUDIT IS CONSTRUCTED

- **7 dimensions, 27 metrics.** Each metric is measured against a defined target benchmark and assigned a status.
- **0 to 100 weighted composite.** Foundational dimensions carry greater weight because every downstream capability inherits their integrity.
- **Four readiness tiers.** Foundation Gap (0 to 39), Stabilize (40 to 59), Optimize (60 to 79), and Activate (80 to 100).

HOW THIS AUDIT WAS DESIGNED

This audit was designed by Chris Tveter, CEO of AIRops Agency, drawing on more than a decade in revenue operations, including in-house roles at Amazon Business and Dynatrace before building the practice. The seven-dimension, 27-metric framework is not theoretical. It was distilled from patterns observed directly across 230+ HubSpot portals, where the same failure mode recurred: teams investing in AI atop a data and governance layer that could not support it. The governing thesis, that AI amplifies existing revenue operations problems rather than remediating them, is the through-line of every one of those engagements, and this scoring model is built to surface those problems before activation rather than after.

ABOUT AIROPS AGENCY

AIRops Agency is a HubSpot Platinum Solutions Partner specializing in AI Revenue Operations. Work is delivered by the principal directly, on a fixed-fee, phased model, with each scope architected to leave the client's team independently capable after handoff. Chris has served as a panelist at HubSpot's Commerce Hub and Sales Hub Summits and works inside client portals every day.

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