

— ERM ADVISORY · EXECUTIVE WORKSHOP

Machine Customer Readiness Index

Executive Workshop Scorecard

20 questions · 5 dimensions · 4 readiness levels

The executive self-assessment for the age of AI-assisted buying.
Score whether an AI assistant acting on behalf of your buyer can find
you, verify you, and buy from you — and exactly where it cannot.

Erik R. Miller · E.R.M. Advisory · erikmiller.com

Companion to The Agent-Ready Revenue Architecture · erikmiller.com/blog/agent-ready-revenue-architecture/

Instructions

This workbook is the facilitated-session version of the interactive assessment at erikmiller.com/resources/machine-customer-readiness-index. Run it in one working session, on paper or in a shared document, with the four functions the MCRI spans in the room.

STEP 1 — GET THE RIGHT PEOPLE IN THE ROOM

Bring marketing, RevOps or sales operations, product, and someone who can speak for legal or IT. Scored from inside one function, the number flatters you — and tells you nothing.

STEP 2 — SCORE HONESTLY

Use the scoring guide below, and score what exists today — not what is on the roadmap. The number only helps you if it is true.

STEP 3 — TOTAL BY DIMENSION, THEN OVERALL

Each dimension totals 4 to 20. The overall index totals 20 to 100. Record both on the scoring worksheet: the total gives you your level; the dimension profile gives you your sequence.

STEP 4 — START AT THE WEAKEST POINT

Find your readiness level on the ladder, then find your lowest-scoring dimension. That is your first wall: the exact place an AI buyer's evaluation of you stops.

SCORING GUIDE

- 1 Not true today
- 2 Rarely true
- 3 Partially true
- 4 Mostly true
- 5 Fully true — and we can prove it

Rule of evidence: if you cannot point to the page, document, or system that proves the answer, subtract a point.

Machine Legibility

Can AI understand your company?

Q1 – Can AI understand your website?

If AI read only the words and structure on your most important pages, would it clearly understand what you sell, who it is for, what it costs, and how someone buys it? Design does not matter here. The facts do.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Q2 – Can AI read your product pages correctly?

If ChatGPT or another AI tool reviewed your product and pricing pages today, would it understand them without guessing? Score higher if your pages use clear structure, current schema, and plain language.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Q3 – Can AI access your product details?

Can an AI system read your full product details without filling out a form, downloading a gated PDF, or asking sales? If the details are hidden, AI cannot use them.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Q4 – Do you describe your products consistently?

Do your pages use the same product names, editions, versions, and pricing units everywhere? Inconsistent naming makes AI treat one offer like several different products.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

DIMENSION SUBTOTAL (4-20)

Verifiable Substance

Can AI verify your claims?

Q5 — Can AI verify your biggest claims?

If AI checked your three biggest claims against reviews, directories, documentation, and analyst coverage, would those claims hold up? Claims are stronger when someone other than you can confirm them.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Q6 — Is your proof easy to access?

Can AI reach the proof that matters, such as security information, compliance certifications, technical documentation, and integration guides, without a login or form? Proof behind a gate is hard for AI to use.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Q7 — Do outside sources describe you correctly?

Do review sites, directories, analysts, and comparison pages describe your company the same way you do? If outside sources misclassify you, AI may recommend you for the wrong thing or not at all.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Q8 — Can your numbers be checked?

Can someone verify the numbers you publish, such as ROI, growth, performance, or savings claims, against a source, date, or method? Unsupported numbers are easy for AI to ignore.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

DIMENSION SUBTOTAL (4-20)

Transaction Readiness

Can AI actually buy from you?

Q9 – Can a customer buy without talking to sales?

Can a qualified buyer start or complete a purchase without talking to a person? Score the real buying path, not the ideal one. Every required meeting creates friction for an automated buyer.

1 2 3 4 5

Q10 – Can AI calculate your price?

Can AI work out what your product costs from published pricing, a calculator, or clear pricing inputs? To an automated buyer, “Contact us” is not a price.

1 2 3 4 5

Q11 – Do you know where the buying path breaks?

Have you actually tested how far an automated buyer could get through your most common purchase? Score 5 only if you know the exact step where the process stops.

1 2 3 4 5

Q12 – Can your systems support the purchase?

If software tried to request a quote, accept standard terms, or create an account, could your systems respond? Or would the process immediately route to a person?

1 2 3 4 5

DIMENSION SUBTOTAL (4-20)

Governance

Can your business safely support AI-driven buying?

Q13 – Are the buying rules written down?

What can an automated deal do without human approval, and is that written down? Include discount limits, standard terms, deal-size thresholds, and escalation rules. Score low if the rules only live in someone's head.

1 2 3 4 5

Q14 – Who owns exceptions?

If an automated purchase went wrong tomorrow, would everyone know who owns the response and when a human must step in? Fast buying requires clear accountability.

1 2 3 4 5

Q15 – Can you stop a bad automated purchase?

If AI made a purchase it should not have made, how quickly would your business notice and respond? Weekly reviews are too slow for transactions that happen in minutes.

1 2 3 4 5

Q16 – Would Legal be comfortable with this?

If AI completed a purchase today, would Legal and Compliance be comfortable with how the contract was accepted, recorded, and audited? If the answer is unclear, the process is not ready.

1 2 3 4 5

DIMENSION SUBTOTAL (4-20)

Discoverability

Will AI recommend you?

Q17 – Does AI recommend you?

When buyers ask AI tools who they should consider, does your company appear as a recommendation, not just a mention? Score from actual testing, not instinct.

1 2 3 4 5

Q18 – Are you present where AI looks?

Are you accurate and up to date in the places AI pulls from, such as review platforms, comparison sites, directories, documentation, and public profiles? If you are missing there, you may be missing from the deal.

1 2 3 4 5

Q19 – Can AI reach your best content?

Can AI systems reach the content that helps you win, or do crawler blocks, forms, and locked PDFs get in the way? A locked door often reads like an empty room.

1 2 3 4 5

Q20 – Does AI describe you correctly?

When AI describes your company, does it get your category, customer, and differentiator right? Being recommended for the wrong reason can still lose the deal.

1 2 3 4 5

DIMENSION SUBTOTAL (4-20)

Scoring Worksheet

Carry each dimension subtotal forward, sum the index, and apply the honesty rule before you read your level.

D1	Machine Legibility	subtotal / 20	<input type="text"/>
D2	Verifiable Substance	subtotal / 20	<input type="text"/>
D3	Transaction Readiness	subtotal / 20	<input type="text"/>
D4	Governance	subtotal / 20	<input type="text"/>
D5	Discoverability	subtotal / 20	<input type="text"/>
MACHINE CUSTOMER READINESS INDEX (20-100)			<input type="text"/>

Scoring bands

INVISIBLE	20-44	Absent from machine-built comparisons; losing by omission today.
LEGIBLE	45-64	Recommended but not buyable; evaluations stop at the transaction wall.
TRANSACTABLE	65-84	An AI buyer can purchase inside your guardrails; you compete on fit and terms.
AGENT READY	85-100	Built for the machine customer by design; readiness compounds.

Honesty rule: your level is capped by your weakest dimension. If any dimension scores 8 or below, drop one level from what your total suggests.

Readiness Levels & Executive Interpretation

LEVEL 1 — INVISIBLE · 20–44

AI buyers cannot find or read you. You are absent from machine-built comparisons — and you do not know it, because no one calls to tell you that you were never considered. Companies here are losing AI-assisted deals today, not in 2028.

LEVEL 2 — LEGIBLE · 45–64

AI can read you but cannot act. You make the shortlist, your claims mostly hold up — and then the evaluation hits a wall: no computable price, no self-serve path, no way to transact. This is where most enterprises honestly sit today: shortlisted, not bought.

LEVEL 3 — TRANSACTABLE · 65–84

An AI buyer can complete a real purchase inside your guardrails: computable pricing, a genuine self-serve path, written rules for what may happen without a human. You are now competing on fit and terms — not on whether a machine can read you.

LEVEL 4 — AGENT READY · 85–100

You treat the AI buyer as a first-class customer by design: readable, verifiable, buyable, governed, and easy to find. Readiness compounds — every improvement makes you easier to select the next time an agent runs a pass.

Reading the profile

Read the dimensions before the total. The total tells the board where you are; the dimension profile tells the operating team what to do. Your first wall is the lowest-scoring question in your lowest-scoring dimension — the exact point where an AI buyer's evaluation of your company ends. Re-score quarterly and report the movement beside your Share of Model number.

Priority Action Planning

Translate the score into a 90-day sequence. Fill in the owner and the first wall before leaving the room.

OUR MCRI SCORE / LEVEL

OUR FIRST WALL (LOWEST DIMENSION, LOWEST QUESTION)

SINGLE ACCOUNTABLE OWNER

THIS WEEK — BASELINE

DAYS 1-30 — LEGIBILITY & SUBSTANCE

DAYS 31-60 — TRANSACTION READINESS

DAYS 61-90 — GOVERNANCE & RE-SCORE

Leadership Discussion Questions

01 What is our MCRI level today, and which dimension is our first wall? If the answer is a guess rather than a score, that is the finding.

02 What share of buying in our category is already AI-assisted, and what evidence are we using to answer that question?

03 If a buyer's agent attempted our most common transaction tomorrow, where exactly would it stop — and how many of our competitors would it get further with?

04 Who owns agent-readiness across marketing, sales, product, and legal — one name, not four — and what did that owner ship last quarter?

05 What would a competitor at Agent Ready take from us first, and how long would it take us to notice?

Board Summary

Built to sit beside your Share of Model report in the same deck: one page, five numbers, one owner.

MCRI SCORE (20–100)

READINESS LEVEL

STRONGEST CAPABILITY

FIRST WALL

SHARE OF MODEL (THIS QUARTER)

OWNER

NEXT RE-SCORE DATE

TOP PRIORITY, NEXT 90 DAYS

Board framing: Share of Model measures whether AI recommends us; the MCRI measures whether AI could buy from us. Read together, they describe our position on both sides of the Delegation Threshold.

Where to Go From Your Score

Seven ERM frameworks and resources, in reading order. Titles and URLs are clickable; QR codes open each page.

01 **The Agent-Ready Revenue Architecture**

The pillar framework this scorecard diagnoses: four layers, one metric, one 90-day sequence
erikmiller.com/blog/agent-ready-revenue-architecture/



02 **The Sixth Seat**

Why every enterprise buying committee now includes an AI agent, and how to win the seat y
erikmiller.com/blog/sixth-seat-ai-agent-buying-committee/



03 **The AI Visibility Architecture**

Earn the recommendation that the Agent-Ready Stack converts into an order.
erikmiller.com/frameworks/ai-visibility-architecture/



04 **Share of Model Measurement Worksheet**

Measure whether AI engines recommend you: the below-the-threshold twin of this scorecard
erikmiller.com/resources/share-of-model-measurement-worksheet/



05 **Buying Group Mapping**

The five human archetypes the Sixth Seat joins, and how to engage the whole committee.
erikmiller.com/frameworks/buying-group-mapping/



06 **The Marketing Execution Gap**

For when you know what to fix and cannot get it prioritized.
erikmiller.com/frameworks/marketing-execution-gap/



07 **Enterprise Marketing Operating System**

The operating disciplines that make readiness work survive contact with the quarter.
erikmiller.com/frameworks/enterprise-marketing-operating-system/

