

AI-Readiness Checklist

Self-assessment checklist to identify agentic AI automation opportunities in your sales process.

by  Flowla

If you can check off any of these boxes, you've found a place to pilot an agent. Each signal maps to a task that's repeatable, measurable, and ripe for automation.

💡 Pro tip: Start where the pain is daily, not just where the impact is biggest. The best pilot agents replace tasks that are annoying, repetitive, and measurable.

1. Prospecting & lead gen



- ☐ Your team spends more than 4 hours/week sourcing or enriching leads
- ☐ Leads sit in CRM untouched for days after being captured
- ☐ You're not reacting quickly to job changes, funding rounds, or intent signals

→ Try a lead enrichment or trigger-based outbound agent (Clay, Apollo, Regie)

2. Call prep & follow-up



- ☐ Reps manually prep before meetings by stitching info from 3+ tools
- ☐ You're still writing post-call summaries by hand
- ☐ Key insights from calls often don't make it into your CRM

→ Try a meeting prep + recap agent (Bardeen, Avoma, Fireflies, Flowla)

3. Mid-funnel management



- ☐ Buyers go dark, and reps aren't following up consistently
- ☐ You have no automated way to detect stalled deals
- ☐ Stakeholders are unclear on where things stand

→ Try a follow-up or stakeholder update agent (Flowla, Mutiny, ChatGPT + Zapier)

4. Proposal & closing

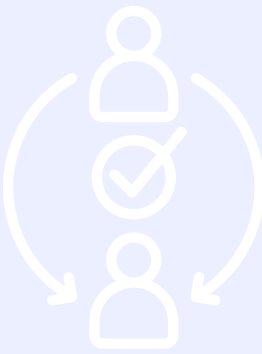
- ☐ Proposals are built manually for every deal
- ☐ Legal review is slow and hard to track
- ☐ There's no system to prompt buyers to take action after proposals go out



→ Try a proposal tracking or quote-to-close agent (Flowla, DocuSign agents)

5. Handoff & onboarding

- ☐ Sales to CS handoff relies on email threads or spreadsheets
- ☐ Onboarding steps are tracked manually
- ☐ Customers frequently ask for context or next steps



→ Try an onboarding journey agent or handoff bot (Flowla, Notion AI workflows)

6. Process ops

- ☐ You're updating CRM records manually
- ☐ Lead routing and scoring logic is brittle or inconsistent
- ☐ Reporting depends on human follow-through



→ Try a Zapier or Make-based agent to automate system-level workflows



One smart deal room.
Infinite **AI-powered workflows.**

See Flowla in action

