

READINESS WORKSHEET

Revenue AI data readiness checklist

Thirty checks across sources, definitions, freshness, permissions and recovery — scored on evidence, for one bounded workflow.

Use this worksheet for one bounded revenue workflow. Score each check:

- **0 — Missing:** no owner or evidence.
- **1 — Informal:** understood by some people but not documented or tested.
- **2 — Verified:** documented, owned and tested with representative records.

Critical gates are marked **STOP**. A failed critical gate blocks production action rights regardless of the total score. A completed checklist is working evidence, not proof of legal, regulatory or security compliance.

Review details

- Workflow:
- Business owner:
- RevOps owner:
- Data/IT owner:
- Security owner:
- Review date:
- Next review date:
- Intended agent actions:
- Prohibited actions:

1. Sources and identity

#	Check	Gate	Score	Owner	Evidence link	Notes/action
1	Every required input has one named authoritative system.	STOP				
2	The exact objects, tables and fields used by the workflow are listed.					
3	A precedence rule resolves conflicts between sources.	STOP				
4	Person, account and opportunity identifiers are documented.					
5	Duplicate detection and survivorship rules are tested.					

#	Check	Gate	Score	Owner	Evidence link	Notes/action
6	Relationship rules for contacts, accounts and opportunities are explicit.					

2. Definitions and completeness

#	Check	Gate	Score	Owner	Evidence link	Notes/action
7	Every decision-driving field has an approved business definition.	STOP				
8	Valid values and stage/status transitions are documented.					
9	Required fields for eligible work are enforced or checked.	STOP				
10	Missing values have an explicit fail, fallback or review behavior.					
11	Historical coverage is sufficient for the intended decision.					
12	Known exceptions and segment-specific definitions are recorded.					

3. Freshness and lineage

#	Check	Gate	Score	Owner	Evidence link	Notes/action
13	Each source has an expected update interval or latency.					
14	The workflow can detect stale or stopped feeds.	STOP				
15	A named owner responds to freshness failures.					
16	Transformations from source to agent context are documented.					
17	Outputs preserve source references needed for human review.					
18	Retention and deletion behavior is defined for workflow evidence.					

4. Permissions and governance

#	Check	Gate	Score	Owner	Evidence link	Notes/action
19	Read access is limited to the records and fields the workflow needs.	STOP				
20	Write or action rights are separately defined from read access.	STOP				

#	Check	Gate	Score	Owner	Evidence link	Notes/action
21	Sensitive fields and prohibited uses are listed.					
22	Consequential actions have named human approval gates.	STOP				
23	Access grants and policy exceptions have an accountable approver.					
24	Permissions and approval thresholds have a review cadence.					

5. Monitoring and recovery

#	Check	Gate	Score	Owner	Evidence link	Notes/action
25	Completeness, freshness, identity and exception metrics are monitored.					
26	Alerts name the person responsible for response and closure.					
27	The workflow fails safely when a critical prerequisite is missing.	STOP				
28	Partial or incorrect actions can be stopped, reversed or escalated.	STOP				
29	Incident, rollback and recovery paths are tested with representative failures.					
30	Data, model, tool and policy changes pass controlled review before production.					

Score

- Sources and identity: _____ / 12
- Definitions and completeness: _____ / 12
- Freshness and lineage: _____ / 12
- Permissions and governance: _____ / 12
- Monitoring and recovery: _____ / 12
- **Total:** _____ / 60
- Failed critical gates: _____

Interpretation:

- **0–29 — Not ready:** fix ownership and critical gates; do not grant production action rights.
- **30–47 — Pilot-ready:** use a bounded scope with mandatory review and explicit exceptions.
- **48–60 — Ready to validate:** test under production-like conditions before widening action rights.

Source-map worksheet

Input/output	System of record	Object/field	Business owner	Technical owner	Refresh expectation	Allowed use/action	Downstream write

30-day repair plan

Priority	Missing evidence or failed gate	Owner	Due date	Test of completion
1				
2				
3				

RevTech provides fully managed AI agents for GTM. RevTech runs the agents; customers govern objectives, permissions, approvals and business decisions.

RevTech provides fully managed AI agents for GTM: RevTech runs the agents, your team governs them. This worksheet accompanies revtech.ai/resources/revenue-ai-data-readiness-checklist and is an operating template, not legal, regulatory or security advice.