JULIET MEY.

AI Readiness.

A short briefing for growth-stage businesses using AI, but not yet seeing the commercial return.

Most growth-stage businesses are already using AI. Fewer can point to where it's improving revenue, retention, cost, or customer trust. AI Readiness finds where AI touches the customer journey, where it's helping, where it's creating risk, and where to start.

PREPARED BY

Juliet Mey.

Customer-driven growth consultant with 19 years leading customer, marketing and commercial work across B2B, services, SaaS and complex growth businesses.

JULIETMEY.COM · JM@JULIETMEY.COM

Why this briefing exists.

AI has moved into the workflow faster than most businesses have had time to govern it.

Marketing is using it for content, sales for outreach and follow-ups, support to summarise tickets and respond faster, operations to automate reporting. It's already everywhere in the business, whether anyone decided that or not.

This briefing gives you a way to check whether it's earning its keep before you invest more time, tools, or budget.

WHAT YOU SHOULD KNOW BY THE END

→ Where AI touches the customer journey.

→ Why customer-facing AI carries commercial risk.

→ How to choose the first use case.

→ Why diagnosis should come before implementation.

→ What a practical next step looks like.

> The commercial test is whether it improves the right work, with clear ownership, at the right point in the customer journey.

The commercial problem.

AI adoption is high. Commercial return is still uneven.

95%.

of generative AI pilots showed no measurable P&L impact.

5%.

of companies are seeing real returns from AI.

SOURCES: MIT NANDA, 2025. BOSTON CONSULTING GROUP, 2025.

THE PATTERN HOLDS LOCALLY

Sage found 73% of South African SMBs have invested in AI, while 47% see meaningful revenue impact.

SOURCE: SAGE, SMALL BUSINESS, BIG OPPORTUNITY, 2025.

AI creates value when the business chooses the right workflow, assigns ownership, redesigns how the work happens, and measures the result.

For growth-stage businesses, the risk is sharper. AI can save time in one function while weakening the customer experience somewhere else.

That's where the commercial cost starts to show up: slower deals, weaker renewal conversations, generic content, inconsistent handovers, and less trust at the points where customers decide.

The signals worth watching.

AI often looks productive from inside a team. The risk shows up when you follow the work across the customer journey.

01

Teams are producing more work while relevance slips.

02

Decisions are happening faster without getting better.

03

Different teams are using different tools without a shared standard.

04

One team saves time while the next team inherits weaker work.

05

Customer communication starts sounding generic, even when the business itself isn't.

THE UNDERLYING ISSUE

AI is being adopted before the business has a clear view of where growth comes from, what customers experience, and where AI helps or harms trust.

Who this is for.

AI Readiness is for growth-stage businesses that are already using AI, but don't yet have a shared way to decide where to use it, how to govern it, and what commercial result it supports.

It's most useful when the business is commercially active, teams are moving fast, and leadership needs a clear view before making another investment decision.

This is likely a fit if:

- → AI is already being used across marketing, sales, support, operations or finance.
- → Output has increased, but commercial return is unclear.
- → Customer-facing work is starting to feel inconsistent.
- → Nobody owns the standard for when AI should assist, draft, route or act.
- → Your CRM holds customer insight the business isn't using properly.
- → You are deciding whether to hire, brief an agency, buy more tools or improve the current workflow first.

SOUTH AFRICAN CONTEXT

Local implementation needs practical design. Connectivity, data costs, tool access, and team habits affect whether an AI workflow works in real business conditions.

The Trust Line.

Trust is the asset your revenue sits on.

Customers build it through the experiences they have with your business: what they read, what you tell them, how quickly you respond, how well you deliver, and whether the experience matches the promise.

AI can support that trust or wear it down. The Trust Line helps you decide where AI can move fast, and where human judgement needs to stay close.

↑ ABOVE THE TRUST LINE CUSTOMER-FACING WORK

This is where trust is built or damaged. A weak AI touch here can cost momentum, confidence, renewals, and referrals.

EXAMPLES: OUTREACH AND CONTENT. PRODUCT PAGES AND LISTINGS. PROPOSALS AND FOLLOW-UPS. SUPPORT REPLIES. ORDER AND DELIVERY UPDATES. RENEWAL AND REFERRAL ASKS.

THE TRUST LINE

↓ BELOW THE TRUST LINE INTERNAL WORK

This is where AI can usually move faster, as long as data, ethics, and quality checks are in place.

EXAMPLES: MEETING SUMMARIES. CRM UPDATES. INTERNAL DRAFTS. REPORT FORMATTING. TAGGING AND ROUTING. RESEARCH SUMMARIES.

The point is to know which side of the line you're on before you let AI do more of the work.

Where AI meets your customer.

Your customer journey has six stages. AI now touches all of them. The risk is highest where the customer can feel the output directly.

STAGE	WHERE AI SHOWS UP	COMMERCIAL RISK IF IT GOES WRONG
01 Find	AI search, SEO, paid search, ads, PR, events.	The business becomes harder to find, or shows up in ways that sound generic or unclear.
02 Educate	Nurture, ABM, blog content, FAQs, comparisons, product descriptions.	Buyers get samey answers that don't help them decide.
03 Convert	Proposals, quotes, follow-ups, recommendations, checkout.	The experience feels off-key or pushy, and a live deal loses momentum.
04 Deliver	Onboarding, order updates, delivery updates, support replies.	The customer feels the gap between what was promised and what's being delivered.
05 Grow	Renewal nudges, reorder prompts, upsell messages, usage tips.	Good customers receive badly timed or tone-deaf communication.
06 Share	Review requests, referral asks, case study outreach, UGC requests.	Happy customers stay quiet because the ask feels automated or impersonal.

AI Readiness identifies the customer journey stage where AI is creating the clearest commercial risk or opportunity, then focuses effort there first.

How we choose the first use case.

The first use case needs to be useful enough to matter and contained enough to do well.

AI Readiness scores each opportunity before recommending where to start. The aim is to avoid choosing a use case because it's fashionable, loud, or easy to demo.

QUESTION	WHAT WE ARE TESTING
What commercial result could improve?	Revenue, retention, cost, speed, risk or customer quality.
What happens if the workflow goes wrong?	The level of customer trust risk.
Is the data usable?	Whether the business has enough reliable input to test the workflow.
Is the process repeatable?	Whether the work happens often enough to justify the effort.
Can the team run it?	Whether there's a clear owner and a workable path to adoption.

THE BAR

The recommended use case has clear commercial upside, manageable customer risk, usable input, a practical delivery path, and one owner who can make it stick.

Pick one AI workflow already running in your business and ask:

01	**Where does it touch the customer journey?**
02	**What customer or account signal does it change?**
03	**Who owns the next action?**
04	**What happens if the customer feels it differently from the team?**

If any answer is unclear, that workflow is doing operational work and missing the commercial work.

Bring your answers to the working session. That's where we start.

The challenge: churn was visible too late.

A SaaS-enabled services business had lost customers, but the team could not clearly see what those customers had signalled before leaving.

Those signals lived in different places: HubSpot, Zendesk, Xero, billing data, customer feedback, meeting notes and team knowledge.

- → Lower engagement.
- → Fewer replies from senior stakeholders.
- → Delayed payments.
- → Negative NPS or feedback.
- → Fewer meeting touchpoints.
- → Project delays.

THE COMMERCIAL RISK

- → High-value clients were only visible once they were already at risk.
- → Churn and retention metrics were not clearly defined or owned.
- → Customer signals were spread across systems and teams.
- → Marketing decisions were not guided by CLV or churn risk.
- → Sales and Customer Success were not always reviewing high-value accounts together.

The work: build the early warning system.

I led the commercial diagnosis and brought in a data specialist for the pipeline work. Together we turned past churn into a practical early warning system.

TOOLS USED: CLAUDE, BAREMETRICS, PROFITWELL, HUBSPOT, ZENDESK, NOTION, XERO, EXCEL

01 **Fix the customer view.**
We cleaned billing and plan data in Baremetrics and ProfitWell, then standardised account IDs across HubSpot, Zendesk and Xero.

02 **Define the metrics.**
We agreed one owner and one definition for churn, retention, and customer lifetime value.

03 **Calculate CLV.**
We used Baremetrics, ProfitWell and Excel to calculate CLV for each customer, then segmented customers by value and churn risk.

04 **Find the churn signals.**
We reviewed past churn against real behaviour: lower engagement, fewer senior replies, payment delays, negative feedback, fewer meetings and project delays.

05 **Create actions.**
We created strategies for each segment to increase CLV or retain, documented in Notion, with HubSpot tasks and email notifications to prompt the team when accounts showed signs of risk.

The philosophy: the closer AI gets to the Trust Line, the closer a human needs to be.

The outcome: earlier action before value was lost.

The business moved from reviewing churn after the fact to spotting customer risk earlier.

The team could see which customers had the highest lifetime value, which behaviours were linked to churn, and which accounts needed intervention.

FOCUSED MARKETING

CLV and risk segments shaped where effort went, which messages were used, and which accounts needed retention or expansion focus.

BETTER PRIORITISATION

High-CLV clients received more senior attention. Sales and Customer Success reviewed priority accounts together.

CLEARER TEAM ACTION

Notion held the segment actions, retention notes, operating rhythm, and customer risk definitions.

WHAT CHANGED, MEASURABLY

- Customer risk became visible weeks earlier, while there was still time to act.
- Priority accounts moved from after-the-fact churn reviews to a weekly shared review.
- One account view across Sales, Customer Success and Finance, instead of three.

As part of this initiative, the business:

→ Calculated CLV for each customer.

→ Used NPS alongside feedback and behaviour as a risk indicator.

→ Segmented customers by value and churn risk.

→ Gave high-CLV accounts more senior attention.

→ Identified behaviours linked to churn.

→ Moved lower-CLV accounts to lighter-touch support.

→ Used HubSpot tasks and email notifications for at-risk accounts.

If AI touches customer decisions, someone owns the outcome.

The King V Code, effective for financial years starting on or after 1 January 2026, makes governing bodies accountable for the ethical and responsible use of AI, including its outputs and outcomes (Principle 10).

SOURCE: INSTITUTE OF DIRECTORS SOUTH AFRICA, KING V CODE, 2025.

For a growth-stage business, the practical version of that obligation is simple. The customer journey is where AI outcomes land. That's where accountability starts.

From diagnosis to implementation.

AI Readiness starts with diagnosis.

The diagnostic identifies where AI touches the customer journey, where it is helping, where it is creating risk and which use case should be tackled first.

Implementation is scoped after that. Some use cases need workflow design only. Some need platform configuration. Some need a specialist build. The right path depends on the business problem, customer impact, owner, data readiness, and risk.

STEP	WHAT HAPPENS	WHAT IT GIVES YOU
01 **Diagnostic**	Map AI against the customer journey and Trust Line.	A clear priority, risk view, and use-case recommendation.
02 **Implementation scope**	Define what the selected workflow needs.	Cost visibility, owner, tool decision, and delivery route.
03 **Build and test**	Put one workflow into practice.	A working process the team can run, measure, and improve.

That keeps the first decision clear: diagnose the right problem, then scope the work properly.

What you leave with.

The diagnostic gives leadership a clear view of where AI should be used first, why that workflow matters, and what needs to happen next.

- → A customer journey view of where AI is already in use.
- → A Trust Line view of customer-facing risk.
- → A shortlist of AI use cases worth testing.
- → One recommended starting point.
- → A clear business owner for the priority workflow.
- → A view of data, tool, and process readiness.
- → A high-level implementation route.
- → A decision-ready recommendation for leadership.

IF IMPLEMENTATION IS APPROVED

The next step is scoped around the selected workflow. That may include workflow design, prompts, templates, approval rules, quality checks, team testing, handover materials and platform specialist input where needed.

Commercials.

AI Readiness starts with a paid diagnostic: the AI Readiness Audit. The diagnostic gives you a clear recommendation before you commit to implementation, platform work, or wider team rollout.

THE STARTING POINT

The AI Readiness Audit.

From R25,000

Typical range R25,000 to R45,000, depending on business size, complexity, and access required.

Best for growth-stage teams that need to see where AI is helping, where it's creating risk, and which use case to tackle first.

INCLUDES

- Two-hour working session on one AI workflow and one customer moment.
- Full customer journey and Trust Line assessment.
- Prioritised use-case shortlist.
- One recommended starting point with a named owner.
- Commercial case and decision-ready recommendation for leadership.

IMPLEMENTATION SUPPORT · SCOPED AFTER THE DIAGNOSTIC

May include workflow design, team testing, customer-facing guardrails, internal rules, prompts, templates, approval steps, measurement setup and handover materials.

Where technical build is required, I coordinate with the right platform specialist. That work is scoped and costed separately before it starts.

Implementation costs may include licences, technical build, custom development, data clean-up, AI usage credits and ongoing technical support. Technical costs are shown clearly and approved before work begins.

Let’s dig in.

We use the session to work out whether AI is the immediate issue, or part of a wider customer journey or growth gap. From there, the path is simple:

01 **The working session.** 60 minutes on your business. Whether AI is the right place to look first.

02 **The Brief.** Within 48 hours, with your priorities and cost ranges. No pressure to go further.

03 **The AI Readiness Audit.** The full customer journey and Trust Line assessment, one recommended use case, and a decision-ready case for leadership. From R25,000.

Book a working session.

60 minutes on your business. The Brief follows within 48 hours with priorities and cost ranges, and there's no pressure to take it further.

Click to find a time for us to connect.

jm@julietmey.com · julietmey.com

SOURCES

01 MIT NANDA, The GenAI Divide: State of AI in Business, 2025.

02 Boston Consulting Group, AI value and return research, 2025.