

TIENTA, INC.

AI Opportunity Audit — Findings

Northstar Creative | Sample Date

SAMPLE REPORT — FOR ILLUSTRATION ONLY

The client, business, and details below are fictional and shown only to demonstrate the format and depth of a real Tienta AI Opportunity Audit.

3 / 5
DEVELOPING

AI READINESS SCORE

Leadership 3 · Culture 4 · Technology 3 · Processes 3 · Data 2 · AI Usage 3 · Operations 3

BUSINESS SNAPSHOT

Northstar Creative is a boutique marketing agency based in Boise, Idaho, founded and led by Alex Rivera, in business for five years, with eight employees serving small-to-midsize regional clients.

Revenue comes from monthly retainer contracts covering social media management, paid ad campaigns, and content production.

Core systems are Google Workspace and Asana for project tracking, plus Meta Ads Manager and Google Ads for campaign work; a few team members use ChatGPT informally, but no tool is sanctioned or standardized.

Stated biggest constraint: turning around client performance reports fast enough during the month-end crunch.

Based on interviews with founder Alex Rivera and two team members.

COMPETITIVE ANALYSIS

AI adoption among marketing agencies has moved quickly from isolated experimentation to daily use over the past couple of years, especially for campaign reporting, ad optimization, and first-draft content. Northstar sits comfortably in the middle of that curve — a pilot is already underway, and a few team members use AI informally, but nothing is standardized yet. Because monthly client reporting and campaign performance summaries are exactly the kind of repeatable, high-volume tasks AI handles well, closing that gap could shorten the month-end reporting crunch and free up account-manager time for the strategic conversations that actually retain clients.

FIVE ACTIONS TO TAKE NOW

1. Standardize on one sanctioned AI tool that keeps client data out of model training. Two business-tier options fit: Claude for Work on the Team plan, or Microsoft 365 Copilot with Enterprise Data Protection, available through the agency's existing Google/Microsoft stack. Both keep prompts, responses, and any uploaded files out of the vendor's model training by default — unlike the free tools a few team members already use informally. This single decision is the foundation every action below depends on.

2. Expand the monthly client-reporting pilot into standard practice. One account manager has been using AI to draft performance summaries; formalizing that into the standard process for all client reports could cut report-turnaround time from a full day to a few hours during the month-end crunch.

3. Standardize on a single toolset instead of scattered individual choices. Different team members currently reach for whatever free tool they're used to, with no shared prompts or templates — consolidating onto one sanctioned tool makes output consistent across accounts and closes the gap between what's sanctioned and what's actually being used.

4. Put a simple written AI-use policy in place. Cover what client campaign data and creative assets can be entered into an AI tool, a human-review step before anything reaches a client, and disclosure language for AI-assisted deliverables — giving the team clear guardrails instead of ad hoc judgment calls.

5. Start tracking time saved per use case. As reporting and other pilots roll out, log hours saved per client or per task each month — this builds the evidence base for deciding where to expand next and shows clients the value behind faster turnaround.

Reaching Tier 5 unlocks the biggest gains in speed and account capacity. For Northstar, standardizing the current pilot and adding simple tracking is the natural next step toward taking on more retainer clients without adding headcount.

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AI Readiness Score — How It's Calculated

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A. AI READINESS SCORE — HOW IT'S CALCULATED

Category	What It Measures	Low Score Looks Like	High Score Looks Like
Leadership	Executive sponsorship and vision for AI adoption	No clear direction or owner	Clear owner, active vision, resourced
Culture	How willing the team is to learn and adopt new tools	Unaware or resistant	Actively experimenting, low resistance
Technology	Whether current systems can support AI tools	Legacy, disconnected systems	Modern, integrated, AI-capable stack
Processes	How repeatable and well-defined daily workflows are	Manual, ad hoc	Well-defined, clearly automatable
Data	How accessible, organized, and secure company data is	Scattered, ungoverned	Organized, governed, accessible
AI Usage	What AI tools are already in use, and how	None in use	Sanctioned tools, clear policy, some training
Operations	How much of day-to-day work is tool-assisted vs. manual	Entirely manual	Tool-assisted across most functions

Northstar Creative scores a 3 — Developing — driven by strong Culture (the team is curious and already experimenting informally) and an engaged founder, but held back by Data — client assets and campaign files are scattered across folders with no consistent naming or governance.

B. THE 5 TIERS OF AI READINESS

1	Not Started No AI tools or direction in place yet; team is largely unaware or hasn't started exploring.
2	Early Awareness Individual, informal use has begun; no sanctioned tools, ownership, or guardrails yet.
3	Developing ◀ You are here A pilot use case is in place or ready to start; early policy and ownership are forming.
4	Actively Adopting AI is integrated into core workflows and systems, with training and governance underway.
5	Advanced AI use is extensive, integrated, and mature; focus has shifted to optimization, security, and governance.

One step behind — Tier 2, Early Awareness: Individual, informal use has begun, but there's no sanctioned tool, ownership, or guardrails yet.

One step ahead — Tier 4, Actively Adopting: AI is integrated into core systems and workflows, not just standalone tools, with training and governance underway.