

MATURITY MODEL · SCORING RUBRIC

# The AI Enablement Ladder™

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Place your team across the four AI maturity stages —  
Experimentation, Adoption, Integration, Optimization —  
using a six-axis scoring rubric built for marketing teams.

FORMAT

PDF Workbook

LENGTH

9 Pages

EDITION

Edition 2026.1

## WHY A LADDER, NOT A CHECKLIST

# AI maturity is sequential. Skipping rungs is how teams stall.

Most marketing teams are not behind on AI. They are stuck on a specific rung and pretending the next one is one tool purchase away.

The Ladder maps four stages every marketing team progresses through — **Experimentation, Adoption, Integration, Optimization**. Each stage has different work, different risks, and different signals of readiness for the next stage. Teams that try to leap from stage one to stage three usually buy enterprise tools their people cannot use, then quietly write off the spend.

**The Ladder works on six axes** — Strategy, People, Process, Data, Tools, and Governance — scored 1 to 4. Your weakest axis defines your real stage, not your strongest. A team with Stage 4 Tools and Stage 1 Governance is a Stage 1 team with expensive software.

## How to use this

On the rubric (pages four and five), score each axis honestly against the four levels. Total your six scores (range 6–24). The total places you on the Ladder; the lowest axis points to the first move.

## THE FOUR STAGES

# From experiment to operating model.

Each stage produces a different kind of value — and a different kind of risk if the team stays there too long.

**STAGE 01****Experimentation**

Individuals try AI in their own work. No coordination, no governance, lots of curiosity. The value is learning. The risk is staying here past the point of diminishing returns.

**STAGE 02****Adoption**

Repeatable workflows emerge. Multiple people use the same tools the same way. The value is productivity. The risk is fragmented spend across many tools with no platform strategy.

**STAGE 03****Integration**

AI is embedded in marketing operations. Workflows, data, and tools are wired together. The value is operating leverage. The risk is over-automation without governance.

**STAGE 04****Optimization**

AI compounds. Proprietary data trains proprietary models, agents handle routine work, humans focus on judgment. The value is durable advantage. The risk is technical debt outpacing strategy.

## What changes between stages

- **Stage 1 → 2** is a *training* problem. Move from curious individuals to repeatable workflows.
- **Stage 2 → 3** is an *integration* problem. Move from many tools to a connected stack.
- **Stage 3 → 4** is a *data* problem. Move from public models to proprietary advantage.
- At every transition, the bottleneck is rarely tools. It is almost always people, process, or governance.

## VALUE &amp; RISK BY STAGE

# What you gain — and what you spend.

Every stage has a characteristic shape of value, cost, and risk. Reading this honestly is how teams decide where to push and where to consolidate.

STAGE	PRIMARY VALUE	INVESTMENT SHAPE	TIME TO ROI	DOMINANT RISK
<b>01 · Experimentation</b>	Team-level literacy & curiosity	Small, decentralized	Immediate (learning)	Stagnation & shadow IT
<b>02 · Adoption</b>	10–25% productivity lift on routine work	Concentrated, tool spend	1–3 months	Tool sprawl, weak governance
<b>03 · Integration</b>	Operating leverage across workflows	Platform & integration spend	3–9 months	Over-automation, quality decay
<b>04 · Optimization</b>	Durable competitive advantage	Data, fine-tuning, talent	9–18 months	Tech debt, vendor lock-in

**The most expensive mistake** is buying Stage 3 or 4 infrastructure for a Stage 1 team. Tools without process, process without people, people without strategy — each layer needs the one below.

## Signals you are ready for the next rung

- **Ready for Adoption.** At least three people are independently producing better work with AI than without it, on at least one repeatable task.
- **Ready for Integration.** Two or more workflows have validated SOPs that survive a personnel change.
- **Ready for Optimization.** First-party data is accessible, governance is operational, and ROI on AI spend can be defended to a CFO.

THE SCORING RUBRIC · PART 1

# Score yourself axis by axis.

For each axis, pick the stage description that most closely matches reality (not aspiration). Score each axis 1, 2, 3, or 4.

AXIS	STAGE 1 EXPERIMENTATION	STAGE 2 ADOPTION	STAGE 3 INTEGRATION	STAGE 4 OPTIMIZATION	SCORE (1-4)
<b>Strategy</b>	No defined AI strategy. Use is opportunistic and uncoordinated.	Use cases identified but not prioritized. AI lives in a slide, not a roadmap.	AI is embedded in the marketing plan. Use cases mapped to revenue or efficiency outcomes.	AI is a competitive lever. Strategy, capacity, and investment compound year-over-year.	1-4
<b>People</b>	A handful of curious individuals experiment in their own time.	Several team members are trained; usage is uneven and undocumented.	Team-wide enablement program. Roles redefined around AI-augmented workflows.	Hiring, evaluation, and promotion all reflect AI fluency. Org structure rewired.	1-4
<b>Process</b>	No standard processes. Each person prompts in their own way.	Some workflows documented. Prompt libraries and SOPs emerging in pockets.	Core workflows (briefing, research, copy, analysis) have validated AI-augmented SOPs.	AI-native processes operate end-to-end. Human review is governance, not production.	1-4

THE SCORING RUBRIC · PART 2

AXIS	STAGE 1 EXPERIMENTATION	STAGE 2 ADOPTION	STAGE 3 INTEGRATION	STAGE 4 OPTIMIZATION	SCORE (1-4)
<b>Data</b>	No first-party data infrastructure for AI. Public models, public data.	First-party data exists but is not connected to AI workflows.	First-party data is structured, governed, and accessible to AI tooling securely.	Proprietary data + fine-tuned or grounded models deliver compounding advantage.	1-4
<b>Tools</b>	Consumer-grade tools used ad hoc. No central license management.	Enterprise licenses for one or two platforms. Limited integration.	Curated stack of AI tools integrated with marketing systems. Cost & usage tracked.	AI agents and automations are part of the operating stack. ROI is measured.	1-4
<b>Governance</b>	No policy. Risk and reputation exposure is implicit.	Acceptable-use policy exists. Privacy & IP risks acknowledged informally.	Documented governance — model approval, data handling, brand safety, disclosure.	Governance is operational. Audit trails, eval frameworks, and risk reviews are standard.	1-4

**Your total**

Sum your six axis scores (range 6-24).

**\_\_ / 24**

**Your weakest axis**

The axis with the lowest score points to your first move.

READING YOUR SCORE

# Where are you on the Ladder?

The total score places your team on a stage. The weakest axis defines what holds you there. Use both together.

<p><b>6–10</b></p> <p><b>Stage 01 · Experimentation</b></p> <p>Curiosity is high, structure is low. Build the basics: training, SOPs, and a tool shortlist.</p>	<p><b>11–15</b></p> <p><b>Stage 02 · Adoption</b></p> <p>Repeatable workflows exist. Consolidate tools, document standards, formalize governance.</p>	<p><b>16–20</b></p> <p><b>Stage 03 · Integration</b></p> <p>AI is wired into operations. Move from tool-led to data-led advantage.</p>	<p><b>21–24</b></p> <p><b>Stage 04 · Optimization</b></p> <p>AI is a durable advantage. Now the work is platform discipline, talent, and risk management.</p>
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## First-move recommendations by weakest axis

WEAKEST AXIS	YOUR FIRST MOVE
<b>Strategy</b>	Run a half-day session to map 3–5 AI use cases against revenue or efficiency outcomes. Output: one written AI strategy on a page.
<b>People</b>	Build a four-week enablement program. Same curriculum, every team member. Measure completion and competence, not attendance.
<b>Process</b>	Pick the two highest-volume workflows. Document the AI-augmented SOP. Train the team on it. Iterate monthly.
<b>Data</b>	Audit first-party data — what exists, where it lives, who governs it. Build the bridge between data and AI tooling before adding more tools.
<b>Tools</b>	Stop adding tools. Audit current usage and consolidate. Pick a primary platform per category; let go of the rest.
<b>Governance</b>	Write the policy. Cover acceptable use, data handling, brand safety, IP, and disclosure. Get legal review. Train the team. Operationalize the policy.

## ANTI-PATTERNS

# Mistakes every stage makes.

The most common mistakes are predictable by stage. Knowing the trap in advance is how teams move up the Ladder without losing six months to a bad decision.

## Stage 1 · Experimentation

- **The shiny-tool trap.** Buying enterprise software before anyone has a use case.
- **The hero-user trap.** Letting one enthusiast carry the team's AI literacy.
- **The pilot-purgatory trap.** Running pilots that never graduate.

## Stage 3 · Integration

- **The over-automation trap.** Automating things that should still have human judgment.
- **The eval gap.** No structured way to measure model output quality.
- **The data-silo trap.** Tools are integrated; data still isn't.

## Stage 2 · Adoption

- **The tool sprawl trap.** Twelve subscriptions, three of which are used.
- **The quality cliff.** Productivity goes up, quality goes down, nobody measures it.
- **The shadow-IT trap.** Procurement doesn't know what marketing is using.

## Stage 4 · Optimization

- **The vendor lock-in trap.** Compounding advantage on a platform that owns the relationship.
- **The tech-debt trap.** Fine-tuned models nobody can re-train.
- **The brand-decay trap.** So much output that brand voice drifts away from itself.

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" AI maturity is not a software purchase. It is an operating-model upgrade.

— MARKETFX AI ENABLEMENT PRINCIPLE

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# Move up a rung without losing six months.

Most teams know which rung they are on. Far fewer know how to move to the next one without burning a quarter on a wrong tool or a wrong hire. A 30-minute strategy session with a senior marketFX strategist will pinpoint the bottleneck and propose the shortest path to the next stage.

[Book a Strategy Session →](#)