

AGENCYMETRICA

The Agency AI Readiness Checklist

The 7 operational areas where AI delivers the fastest ROI for marketing agencies. No fluff. No theory. Just actionable steps you can review on your own time.

Built and proven at Mindsheep Marketing, our own agency · agencymetrica.com

Why This Checklist Exists

Most marketing agencies know AI matters. Very few have actually operationalised it. A couple of people use ChatGPT for the odd first draft, and that is where it stops. The systems that actually move the needle, automated reporting, unified communications, AI-assisted proposals, operational orchestration, stay on the to-do list.

That gap is an opportunity. The agencies that embed AI properly now will run leaner, respond faster, and win the clients slower agencies lose.

We wrote this checklist because we lived it. Over 18 months we rebuilt our own five-person agency, Mindsheep Marketing, around AI systems. Reporting went from 22 hours a week to 6. Proposals went from 72 hours to 8. The team got their evenings back, and we kept 100% of our clients through the transformation.

How to use this checklist: work through the seven areas below. For each one, tick the items your agency already has in place, then score yourself out of 5. Anything scoring 3 or less is an opportunity. Most agencies find two or three areas where the gains are immediate.

The honest disclaimer: figures in this guide come from our own internal data at Mindsheep Marketing or from cited industry research. Your results will depend on your starting point, team size and client mix.

1. Reporting & Analytics

The pain. Marketers spend an average of 12.5 hours per week on data collection and reporting (HubSpot, 2024). For a multi-client agency, that multiplies fast, and by the time the report is built, the data is already old.

Checklist:

- Campaign data is pulled automatically from every platform (no manual exports or copy-paste)
- All clients are visible in one portfolio view with health indicators
- Reports generate themselves on a schedule, in your agency's branding
- AI drafts the report commentary; a human reviews and approves
- Anomalies (spend spikes, conversion drops, tracking failures) trigger alerts before clients notice

What good looks like: your Monday morning is a 5-minute review of a dashboard that is already up to date, not a 3-hour scramble across six platforms.

Self-score: ___ / 5

2. Client Communications

The pain. Employees spend 28% of the workweek managing email alone (McKinsey, 2023), and clients now message across email, WhatsApp, Slack, SMS and social DMs. Every missed message risks a relationship you spent months building.

Checklist:

- Every client message, from every channel, lands in one shared view
- Messages are routed automatically to the right person by client, topic and urgency
- Common questions get instant, context-aware acknowledgements
- Threads that go quiet past your SLA trigger follow-up reminders and escalation
- You can see response times per client and per team member

What good looks like: nothing slips. First responses land in minutes, clients never repeat themselves, and no one is checking five inboxes.

Self-score: ___ / 5

3. Proposals

The pain. The average proposal takes 34 hours to produce (Proposify, 2024). Agencies using AI-assisted systems respond same-day. Every slow proposal is a deal a faster competitor can close first.

Checklist:

- Meeting notes, transcripts or voice memos can become a structured first draft without retyping
- Relevant case studies and service descriptions are pulled in automatically
- Proposals format themselves against your brand template
- Turnaround from discovery call to sent proposal is measured in hours, not days
- A human always reviews strategy, pricing and positioning before sending

What good looks like: your senior people spend 20% of the old effort adding the judgment that wins the deal, instead of 100% of it assembling documents.

Self-score: ___ / 5

4. Task Management

The pain. 62% of the average workday goes to "work about work" rather than skilled tasks (Asana, 2024). In an agency, every client request has to be read, interpreted, entered, assigned and tracked, dozens of times a day.

Checklist:

- Client requests become tasks in your PM tool automatically, from any channel
- Tasks are assigned by client ownership, skill and current capacity
- Urgency is detected and prioritised from the message itself
- Clients get automatic acknowledgements and milestone updates
- Managers can see the whole team's workload in real time

What good looks like: nothing lives in someone's head or on a sticky note. When someone is sick, their work is visible, not a mystery.

Self-score: ___ / 5

5. Web Development

The pain. Agency dev teams rebuild the same page types over and over. Scaffolding, content population, responsive testing and QA are predictable, repetitive, and exactly what AI accelerates.

Checklist:

- AI coding assistants are configured around your design system
- Client content flows from brief to page sections without manual placement
- QA for links, accessibility, responsiveness and performance runs automatically
- A reusable component library grows with every project
- Developers keep full creative control; AI handles the boilerplate

What good looks like: build times drop 30 to 50%, and your developers spend the saved time on the design problems clients actually pay for.

Self-score: ___ / 5

6. Email Automation

The pain. Agencies send hundreds of emails a week: status updates, follow-ups, onboarding sequences, meeting summaries, internal digests. Most follow the same patterns, and all of them steal time from strategy.

Checklist:

- Routine status updates are drafted by AI from live project data
- Follow-up sequences run on schedule until the recipient responds
- Onboarding emails trigger automatically when a client signs
- Meeting summaries generate from notes or transcripts
- A human reviews and presses send on anything client-facing

What good looks like: routine email drafting time drops by more than half, follow-ups never get forgotten, and everything still sounds like your team wrote it.

Self-score: ___ / 5

7. Operations

The pain. Onboarding checklists, invoice reminders, deliverable tracking, scheduling, none of it is complex, but together it quietly consumes 10+ hours a week. And 73% of agency owners say they lack the operational visibility to even see the leaks (AgencyAnalytics, 2024).

Checklist:

- Client onboarding (welcome, access, kickoff, documents) runs as an automated workflow
- Invoices and payment reminders generate from retainer schedules or milestones
- Deliverable deadlines are tracked with automatic reminders
- Every operational process is documented, with an owner and a trigger
- Leadership has a real-time view of agency health, not a gut feel

What good looks like: if a task does not require human judgment, it does not require human time.

Self-score: ___ / 5

Your Score, and What to Do Next

Add up your seven scores (out of 35):

28 to 35: You are ahead of nearly every agency. Optimise and compound.

18 to 27: Solid foundations with clear gaps. Two or three targeted systems would change your weeks.

8 to 17: Significant time is leaking every week. Prioritise reporting and communications first.

Under 8: You are running on stamina. The good news: agencies starting here see the most dramatic gains.

How we approach this (The Compound Method)

1. Audit (weeks 1-2). We map your workflows and quantify where time is lost. You get an Agency Operations Blueprint: a prioritised list of what to automate and what each item saves. **Then you choose what we build.**

2. Build (weeks 3-8). We build and integrate only what you chose, in stages, tested with your team as we go.

3. Support (ongoing). We train every team member, track adoption, and review performance monthly. Benchmark: your team runs everything independently within 90 days.

Get your tailored plan

The fastest next step is the free 5-minute assessment. It scores your agency across all seven areas and returns a personalised plan of what fits and what it would save you. No sales call required.

Take the assessment: agencymetrica.com/assessment

Or talk it through with Gary: gary@agencymetrica.com · david@agencymetrica.com

© 2026 AgencyMetrica. Figures reference internal Mindsheep Marketing data and cited industry research (HubSpot 2024, McKinsey 2023, Proposify 2024, Asana 2024, AgencyAnalytics 2024). This checklist is provided for guidance; individual results vary.