

AI Readiness Assessment

Unlock the Real Power of AI in Your Sage ERP & CRM Systems

Your business platforms, including your Sage ERP and CRM systems, already have AI capabilities - are you leveraging them to their full potential?

Our AI Readiness Assessment is designed specifically to help organizations like yours discover practical, impactful ways to use AI. We'll show you how to automate processes, improve decision-making, and drive significant ROI, all by maximizing the systems you already use.



What You'll Get From Our Assessment:



AI Use Case Discovery:

We analyze your unique business processes to pinpoint tangible, real-world AI opportunities, such as:

- ▶ Enhanced sales forecasting and pipeline optimization
- ▶ Automated customer insights for personalized experiences
- ▶ Predictive inventory management for reduced costs
- ▶ Intelligent workflow automation across departments



Data & System Readiness Review:

We conduct a thorough audit of your existing landscape, examining:

- ▶ Your current ERP/CRM stack (including Sage X3, Intacct, 300, 100, 500, Salesforce, Dynamics 365 CRM)
- ▶ Your integration readiness for AI tools
- ▶ Your data quality and governance frameworks
- ▶ Any existing AI tools and their current utilization



AI Maturity Scorecard:

You'll receive a clear, executive-friendly report that provides a comprehensive score for your organizations:

- ▶ Overall AI adoption readiness
- ▶ Process automation maturity
- ▶ Effective use of native platform copilots (like Sage Copilot)
- ▶ Potential for seamless integration of new AI capabilities



Strategic AI Roadmap:

We'll deliver a custom, actionable roadmap tailored precisely to your business, featuring:

- ▶ Prioritized, high-impact AI use cases
- ▶ Essential guidance on risk, compliance, and data governance for AI. You'll walk away with a clear, phased plan for the next 3, 6, and 12 months.
- ▶ A detailed integration plan incorporating cutting-edge technologies (including GPTs, Copilots, RPA)

Who Should Consider **This Assessment?**

This assessment is ideal for leadership and management teams looking to strategically integrate AI, including:

- ▶ CIOs & CTOs planning comprehensive digital transformation initiatives
- ▶ CFOs exploring AI to drive efficiency and automation in finance operations
- ▶ Sales or Marketing Heads aiming to maximize their CRM investments (Sage CRM, Salesforce, Dynamics 365 CRM)
- ▶ Operations teams utilizing Sage ERPs (X3, Intacct, 300, 100, 500) and other business platforms

Why Choose Greytrix?

We are uniquely positioned as **ERP & CRM experts** with deep AI capabilities.

- ▶ We know your specific systems, processes, and data inside-out.
- ▶ Benefit from our deep domain experience across Sage platforms, Dynamics 365 CRM, and Salesforce.
- ▶ Leverage our specialized expertise in Sage Copilot and Open AI integrations.
- ▶ Our strong focus is always on achieving tangible business outcomes, not just on technology adoption.



Ready to Start?

Whether you're exploring AI for the first time or need help expanding its use in your business, we'll provide the clarity and roadmap to move you forward, fast.

Contact us today to schedule your complimentary scoping call and begin your AI journey.