

Laying the Groundwork for Agentic AI Executive Narratives

Dashboards report the past; Agentic AI can explain what happened and what to do next through executive-ready narratives. Even small data fixes unlock big value—now's the time to clean them up.

Follow the path. Unlock Agentic AI.

START

1 Get Your Funnel Story Straight

Ensure every team works from the same playbook with crisp definitions for MQLs, SALs, SQLs, and opportunity stages.

2

Don't Franken-CRM It

Avoid custom objects. Custom fields are fine, but don't reinvent your CRM. Use a standard data model that works across systems and plugs into modern AI solutions.

3

Track Stage Timestamps

Track the exact timing of MQLs, meetings, and key funnel milestones. If a lead skips stages, backfill the dates—cohort analysis breaks with missing timestamps.

4

Tidy Up Your Sources

Standardize Lead Source and Detail fields to avoid duplicates and noise.

5

Keep Campaigns Consistent

Align on campaign names, types, and what counts as a true response.

6

UTMs Aren't Optional

Use consistent UTM naming to track early engagement before lead creation.

7

No Contacts, No Journey

Reps will do what it takes to close—make adding contacts required to advance the deal.

FINISH

About Mperativ

Ready to take the next step? Mperativ connects to your CRM to uncover the stories behind your data and surface data hygiene issues. Built for CMOs and GTM leaders, it turns disconnected GTM data into strategic narratives, clear attribution, and actionable insights. Learn more at www.mperativ.io.