

AI Enterprise Maturity Model

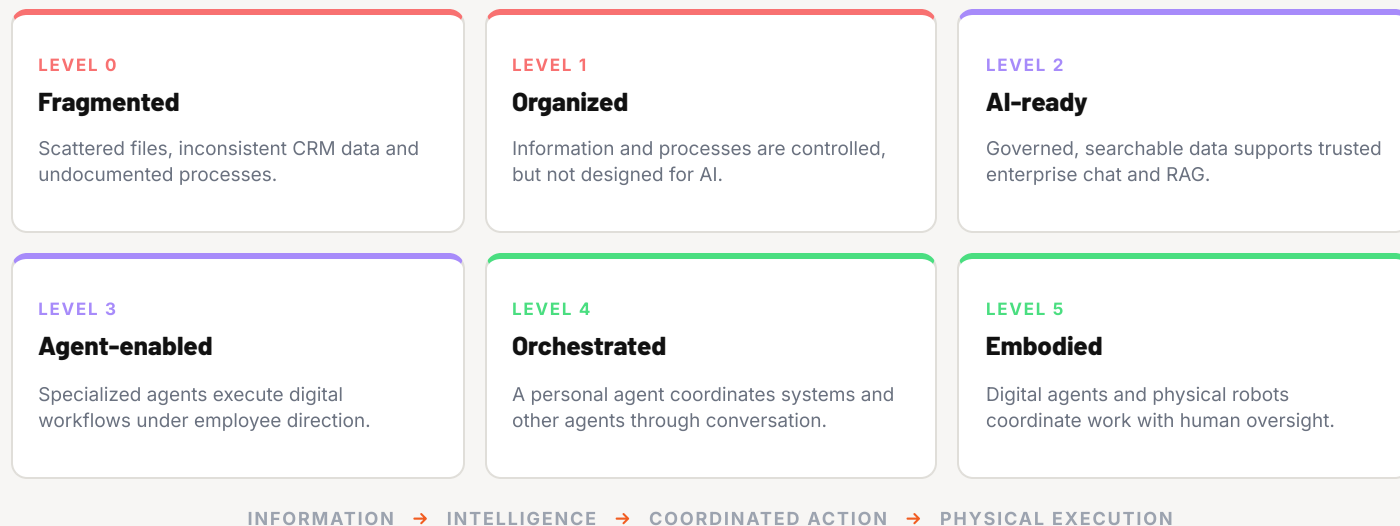
A practical vision for how companies evolve from fragmented information and manual processes to AI-orchestrated operations.

Makna Tech helps companies move from scattered information to intelligent execution.



From information to coordinated action

This model describes how an organization evolves from digitally active but fragmented operations into an AI-native operating model — from organizing information, to producing trusted answers, to executing work through agents, and eventually coordinating digital and physical systems.



A company may be mature in one area and immature in another. The model should therefore produce a **maturity profile across data, processes, technology, governance and people** — not only a single score.

Establish operational control

LEVEL 0

Fragmented

- Files are distributed across email, SharePoint, Google Drive and local computers.
- No consistent folder structure, naming convention or retention strategy.
- Duplicate, outdated and conflicting documents are common.
- Processes live primarily in employees' heads, with few documented SOPs.
- CRM information is incomplete, duplicated or unreliable.
- Access permissions and data ownership are unclear.

AI implication

AI cannot consistently produce reliable results because the underlying information is incomplete, contradictory or inaccessible.

Primary objective: Establish control over information and business processes.

LEVEL 1

Organized

- Defined file and folder structures, with document ownership and access controls.
- Documented SOPs for important processes.
- Consistent CRM usage and cleaner information.
- Reduced duplication and improved data quality.
- Core applications and information sources are identified.
- Gaps remain: limited metadata, no enterprise taxonomy, limited integration.

AI implication

Information is organized for people, but not yet structured, governed or connected for reliable AI use.

Primary objective: Transform organized information into governed, AI-ready information.

Turn information into execution

LEVEL 2

AI-ready

- Documents have useful metadata, ownership and classifications.
- Data sources are connected, indexed and searchable.
- AI systems respect source permissions and access controls.
- Information supports retrieval-augmented generation (RAG).
- AI usage policies and guardrails are established.
- Employees use enterprise chat to find, summarize and analyze information.

Employee experience

Employees can ask grounded questions about customers, decisions, policies, communications and upcoming meetings.

Primary objective: Provide trusted answers grounded in company information.

LEVEL 3

Agent-enabled

- Specialized agents prepare proposals, reports and communications.
- Agents update CRM records, process documents and analyze operational data.
- Agents monitor projects, deadlines and exceptions.
- Agents create tasks and trigger approval workflows through connected systems.
- Employees supervise agents from a unified work environment.
- Sensitive, financial, legal and high-impact actions retain human approval.

Human role

Define objectives, review exceptions, approve important decisions and improve agent behavior.

Primary objective: Move from information retrieval to controlled execution.

Coordinate the enterprise

LEVEL 4

AI-orchestrated

- Employees communicate through natural-language chat, voice, mobile or desktop experiences.
- The personal agent understands the employee's role, permissions, customers, projects and priorities.
- It delegates work to specialized agents and coordinates activities across the organization.
- It presents proposed actions and requests approval when required.
- Application-centric work gives way to intent-driven work.

Example

"Prepare me for this customer meeting, identify unresolved issues, check account status, update the opportunity and draft the follow-up email."

Primary objective: Create one conversational layer that coordinates the digital enterprise.

LEVEL 5

Embodied AI enterprise

- AI agents coordinate with robots, manufacturing equipment and warehouse systems.
- Agents interact with vehicles, drones, IoT devices and building controls.
- A digital inventory agent can identify a shortage and direct material movement.
- A maintenance agent can detect a problem, schedule service and guide a technician or robot.
- A logistics agent can coordinate orders, vehicles and physical loading operations.

Human role

Establish objectives, safety rules, ethical boundaries and operational oversight.

Primary objective: Coordinate digital and physical execution.

Five dimensions determine readiness

Makna Tech assesses each dimension independently to reveal where progress is blocked and where investment will create the greatest impact.

DIMENSION	WHAT MAKNA TECH EVALUATES	READINESS QUESTION
Data	Quality, metadata, classification, ownership, accessibility and retention	Can AI locate and trust the right information?
Processes	SOPs, consistency, automation opportunities, approvals and exceptions	Is the work defined well enough to automate safely?
Technology	Business applications, APIs, integrations, identity and infrastructure	Can systems securely exchange context and actions?
Governance	Security, privacy, permissions, auditability, risk and human oversight	Can AI operate within clear and enforceable boundaries?
People	Skills, responsibilities, adoption, training and organizational readiness	Can employees confidently supervise and improve AI-enabled work?

A maturity profile, not just a score

DATA	PROCESSES	TECHNOLOGY	GOVERNANCE	PEOPLE
Level 1	Level 0	Level 2	Level 1	Level 1

This example company has sufficient technology to begin selected AI work, but weak processes and inconsistent data would prevent dependable automation. The roadmap should address those constraints before expanding agent autonomy.

Five transitions from disorder to orchestration

01

Organize the business

FRAGMENTED → ORGANIZED

Create information discipline, document core processes and establish ownership.

02

Prepare the business for AI

ORGANIZED → AI-READY

Add metadata, governance, integration and trusted retrieval.

03

Turn intelligence into action

AI-READY → AGENT-ENABLED

Connect specialized agents to workflows with human approvals.

04

Create an orchestrated AI workforce

AGENT-ENABLED → AI-ORCHESTRATED

Coordinate systems and agents through a personal conversational layer.

05

Connect digital and physical operations

AI-ORCHESTRATED → EMBODIED

Extend governed intelligence into machines, devices and physical work.

The destination depends on the business. A professional-services company may reach its ideal operating model at Level 4. A manufacturer, warehouse or logistics company may gain additional value from Level 5. The goal is not maximum automation — it is the right combination of intelligence, control and human judgment.

MAKNA TECH VISION

From scattered information to intelligent execution.

Makna Tech helps organizations build the data foundations, operational discipline, secure integrations and intelligent agents required to progress confidently through each level.