

Agent Journey Audit

Northgate CRM

northgate-crm.example

Audit date	Reviewer	Site type	Journeys run
12 September 2026	Example reviewer	B2B software	10

Executive verdict

Agents can confirm Northgate's security posture, docs and free trial, but can't quote its prices, and its help center refuses agents that don't run a browser.

Journey outcomes



Top blockers to fix first

1. Put plan prices in the page HTML

JS ONLY

Assistants that don't run JavaScript can't quote Northgate's prices, so they may leave it out of a cost comparison or describe it as "contact sales".

Web team Effort: small Finding 1

2. Let agents read help-center articles

BLOCKED

When a customer asks an assistant how to do something in Northgate, the assistant may answer from forums or guess instead of using the official article.

Support operations Effort: small Finding 2

3. State plan limits on the pricing page

PARTLY

"Which plan do I need for 40 users?" is a common question. Without limits, an agent can't answer it and may recommend a competitor that states them.

Product marketing Effort: medium Finding 3

What already works

Security & compliance

CONFIRMED

Trust page states SOC 2 Type II and how to request the report.

Documentation

CONFIRMED

Docs reachable without login; lms.txt present.

Start a trial or book a demo

CONFIRMED

14-day free trial linked from homepage and pricing.

Re-test

Proposed 10 October 2026

All 10 journeys, same agent identities and location. Status: pending.



Journey overview

Every Agent Journey, and how it ended

Ordered by how much the journey matters to a buyer - not by outcome.

Journey	Outcome	Blocker or answer	Confidence
Understand the product "What does Northgate do, and who is it for?"	CONFIRMED	Homepage states the product and audience in plain HTML.	high
Find pricing "Where are Northgate's prices?"	CONFIRMED	Pricing page linked from the main navigation.	high
Read plan prices "How much does the Growth plan cost?"	JS ONLY	Prices appear only after JavaScript runs. See journey finding 1	high
Compare plans "What's the difference between Growth and Enterprise?"	PARTLY	Comparison table exists; plan limits say "Contact sales". See journey finding 3	medium
Security & compliance "Is Northgate SOC 2 compliant?"	CONFIRMED	Trust page states SOC 2 Type II and how to request the report.	high
Start a trial or book a demo "Can I try it before talking to sales?"	CONFIRMED	14-day free trial linked from homepage and pricing.	high
Documentation "Is there setup documentation?"	CONFIRMED	Docs reachable without login; llms.txt present.	high
Integrations & API "Does Northgate have an API?"	CONFIRMED ELSEWHERE	API reference hosted on a separate docs-provider domain.	high
Get support "How do I get help with an import?"	BLOCKED	Help center returns 403 to agents without a browser. See journey finding 2	high
Data residency "Can data be stored in the EU?"	COULDN'T CHECK	Answer is inside a gated PDF behind a form.	low

Couldn't check

Data residency: The answer is inside a PDF that requires submitting a form. We don't submit forms. Not counted against the site.

Access overview

How each kind of agent reaches the site

Agents don't all arrive the same way. Every journey was run as each of these.

	Homepage	Pricing	Trust center	Docs	Help center
Plain HTTP agent Reads the HTML it receives; runs no JavaScript.	Reached	Needs JavaScript Prices missing	Reached	Reached	Refused 403
Browser-based agent Operates a real browser; JavaScript on.	Reached	Reached	Reached	Reached	Reached
Declared for agents What the site publishes for agents directly.	Couldn't verify WebMCP	Not declared	Not declared	Declared llms.txt	Not declared

- Reached

The agent got the content it needed.
- Needs JavaScript

The content only appears after JavaScript runs.
- Refused

The site refused this kind of agent.
- Not declared

Nothing is published for agents here.
- Declared

Published for agents directly.
- Couldn't verify

We couldn't tell. Never counted as absent.

Reading this overview

Plain agents read the HTML they receive and run no JavaScript. Browser agents operate a real browser. "Declared for agents" is what the site publishes for agents directly (for example llms.txt or WebMCP). "Couldn't verify" is never counted as absent.

Journey finding 1 - Read plan prices

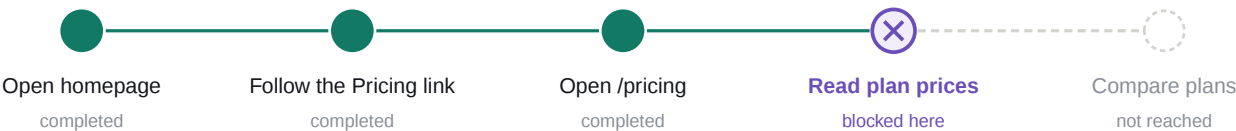
JS ONLY

Plan prices are only visible with JavaScript

Buyer question

"How much does the Growth plan cost?"

Journey trace



Blocker

The pricing page loads for every agent, but the plan prices are injected by a script. An agent that reads the HTML sees each plan name followed by an empty price.

Business impact

Assistants that don't run JavaScript can't quote Northgate's prices, so they may leave it out of a cost comparison or describe it as "contact sales".

Person view (browser)

200 - https://northgate-crm.example/pricing

Growth

€49 per user/month

Enterprise

Talk to sales

Agent view

200 - Plain HTTP agent · no JavaScript

Growth

– per user/month

Enterprise

Talk to sales

Structured-data read - No Offer, price or priceCurrency found

```
application/ld+json: { "@type": "Organization", "name": "Northgate CRM" }
```

Fix

Render each plan's price in the server HTML, or add schema.org Offer data with price and currency.

Acceptance test	Owner	Effort	Confidence
A plain HTTP fetch of /pricing contains "€49".	Web team	small	high

Trade-off: None found — the prices are already public in the browser. Confidence note: Checked three ways: plain fetch, browser session and structured data.

The help center refuses agents that don't run a browser

Buyer question

"How do I get help with an import?"

Journey trace



Blocker

The Help link leads to help.northgate-crm.example. A plain HTTP request gets a 403 from the help center's bot protection; a browser session gets the articles.

Business impact

When a customer asks an assistant how to do something in Northgate, the assistant may answer from forums or guess instead of using the official article.

Person view (browser)

200 - https://help.northgate-crm.example/hc/en/articles/import

Import customers from a CSV – Go to Settings > Data > Import and choose your file.

Agent view

403 - Plain HTTP agent · no JavaScript

403 Forbidden

Request blocked by bot protection.

Fix

Allow AI assistants' user agents to read help-center articles; keep rate limiting in place.

Acceptance test	Owner	Effort	Confidence
A plain HTTP fetch of /hc/en/articles/import returns 200 with the article text.	Support operations	small	high

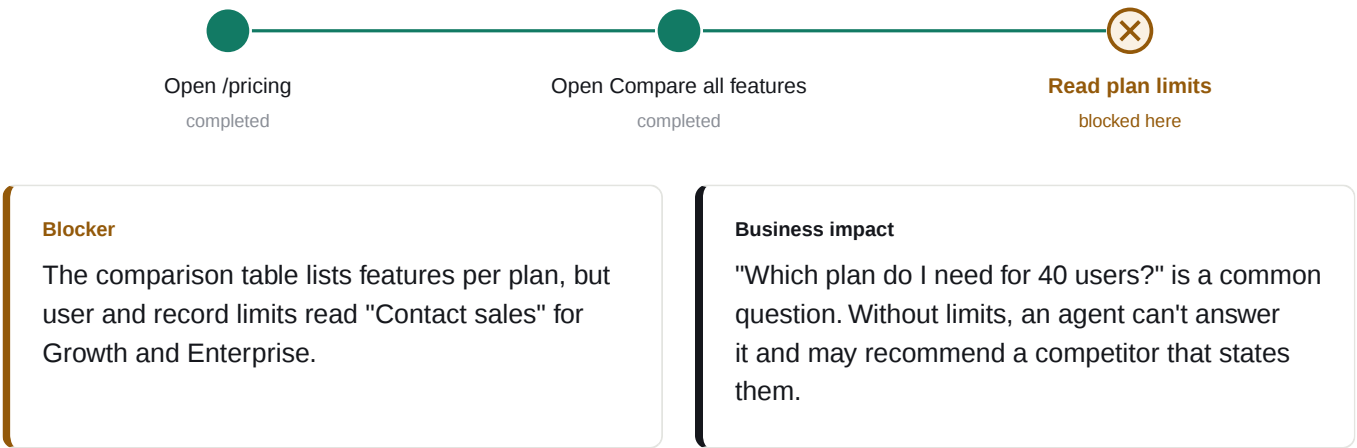
Trade-off: If the block is deliberate (for example to limit scraping), allow known AI assistants' user agents rather than removing protection. Confidence note: Reproduced three times from one location; other locations not tested.

The plan comparison doesn't state plan limits

Buyer question

"What's the difference between Growth and Enterprise?"

Journey trace



Agent view

200 - Plain HTTP agent · no JavaScript

Users included | Starter: 3 | **Growth: Contact sales** | Enterprise: Contact sales

Fix

Add default user, record and API limits to the comparison table.

Acceptance test	Owner	Effort	Confidence
The comparison table states a user limit for every self-serve plan.	Product marketing	medium	medium

Trade-off: Limits may be deliberately negotiable. Stating a default ("from 25 users") still answers the question. Confidence note: Limits could exist in the sales deck; the public site doesn't state them.

Fix brief

Ready for your backlog

FIX-1	Render plan prices in the initial HTML Server-render each plan's price, or add schema.org Offer data with price and priceCurrency. Done when: A plain HTTP fetch of /pricing contains "€49".	/pricing Web team Effort: small
FIX-2	Allow AI assistants to read help-center articles Add AI assistants' user agents to the bot-protection allowlist for article pages; keep rate limits. Done when: A plain HTTP fetch of /hc/en/articles/import returns 200 with article text.	help.northgate-crm.example Support operations Effort: small
FIX-3	State default plan limits Replace "Contact sales" limits with defaults (users, records, API calls) per plan. Done when: The comparison table states a user limit for every self-serve plan.	/pricing#compare Product marketing Effort: medium

Re-test plan

Proposed 10 October 2026 All 10 journeys, same agent identities and location. A before/after outcome table, with changes highlighted.		
Read plan prices	JS ONLY	then: pending
Compare plans	PARTLY	then: pending
Get support	BLOCKED	then: pending

Limits of this audit

- No sign-in, form submission or purchase.
- One location (Amsterdam, NL); access rules can differ by country.
- Search inside the site was not used.
- Results describe the site on the audit date.
Agents: Plain HTTP agent · no JavaScript; Browser-based agent · JavaScript on; Structured-data and protocol discovery.
Location: Amsterdam, NL. Window: 12 Sep 2026, 10:10-11:40 CEST.

Reviewed and signed off by

Example reviewer
12 September 2026

MCPWebsite
Audit method v0.8 (example)