[YOUR BUSINESS NAME]

RevOps Health Check

A diagnostic snapshot of your revenue engine:
where it's working, where it's leaking, and what to fix first.

PREPARED FOR	**Northwind Analytics**
DATE	**4 August 2026**
PREPARED BY	**[Your name]**

SUMMARY

Demand isn't your problem. You're generating more than enough qualified interest, and the team knows the market well. The constraint is everything that happens after a lead arrives. Because your deal stages aren't defined and each rep works their own way, the pipeline doesn't describe reality, which is why the forecast has missed three quarters running, and why the misses feel unpredictable rather than explainable. Fix the stages and the definitions and you'd have a forecast the board can lean on within a quarter, without adding headcount or tools.

REVENUE ENGINE MATURITY

Reactive | **Managed** | Repeatable | Optimised

You have hands on the wheel: parts of the engine are actively run and watched. What's missing is consistency — the same situation still gets handled differently depending on who's dealing with it.

4 of 5 areas need work

REVENUE ENGINE SCORECARD

Healthy — working as it should | **At risk** — functioning, but leaking | **Critical** — costing you revenue now

Area	Status	Assessment	What good looks like
CRM & data health	AT RISK	HubSpot is in place and the reps do use it, but required fields vary by person and nobody owns hygiene: two reps worked the same account last month.	One system of record the team trusts, with a named owner and a short list of mandatory fields.
Sales process & consistency	AT RISK	Stages exist in the CRM but aren't defined or written down, so all four reps run a different motion. New reps ramp by shadowing, which takes roughly five months.	Written stages with clear exit criteria that every rep follows, and a repeatable way to ramp a new hire.
Pipeline & forecasting	CRITICAL	The forecast is assembled from rep judgement in a spreadsheet. It has missed by 20% or more for three consecutive quarters, and you can't see where deals drop off.	An agreed method and shared definitions landing within 10–15% of the number, with visible stage-by-stage conversion.
Tool stack	AT RISK	A sensible stack overall, but the outbound tool doesn't sync activity back into HubSpot, so reporting on top-of-funnel effort is manual and partial.	A deliberate stack where every tool is adopted, integrated and clearly earning its cost.
Marketing, sales & CS alignment	HEALTHY	The handoff itself works, but marketing and sales define a qualified lead differently, and no single person owns churn or expansion.	One shared definition of a qualified lead, clean handoffs both ways, and a named owner for churn and expansion.

PRIORITY ACTIONS

01

Define your deal stages and exit criteria

Root cause of the forecast misses. Until every rep advances a deal on the same evidence, no forecast built on it can be trusted.

IMPACT · HIGH | EFFORT · MEDIUM

FIRST MOVE
Block 90 minutes with your two most senior reps and write the exit criteria for each stage.

EXPECTED OUTCOME
A forecast you can defend to the board within two quarters.

02

Agree one definition of a qualified lead

Marketing and sales measure different things, which inflates early-stage pipeline and hides where deals really drop off. Most forecast noise starts here.

IMPACT · HIGH | EFFORT · LOW

FIRST MOVE
One meeting with marketing to write the definition on a page, then load it into HubSpot.

EXPECTED OUTCOME
Both teams working to the same number, and honest early-stage pipeline.

03

Give CRM hygiene one owner and three required fields

Stops the duplicate-account problem immediately, and makes the reporting behind actions 1 and 2 possible at all. An afternoon's work.

IMPACT · MEDIUM | EFFORT · LOW

FIRST MOVE
Name the owner this week and make three fields mandatory on every deal in HubSpot.

EXPECTED OUTCOME
A pipeline that reflects reality, and reporting that's possible at all.

YOUR QUICK WIN THIS WEEK

Pick one owner for CRM data hygiene and agree three fields that are mandatory on every deal. It takes an afternoon, needs no budget or tooling, and it stops most of the data mess at source, including the duplicate accounts.

WHERE I CAN HELP

OPEN QUESTIONS

The questions a 30-minute conversation can't answer

- ? How much revenue is actually leaking, and at which stage.
- ? How much of the pipeline sitting in your CRM today is real, and how much is stale deals inflating the number.
- ? Which of the three actions above pays back first, given your deal sizes and cycle length.
- ? Whether slow ramp is a process problem or a hiring one — that needs win rates broken down by rep and by tenure.
- ? What your stack really costs against what's genuinely used: licences, seats and overlap.
- ? How your conversion rates compare with similar companies at your stage.

RECOMMENDED ENGAGEMENT

The RevOps Audit — four weeks

- A full audit of your CRM data, not a conversation about it
- Interviews with your reps and marketing, so the process is mapped as it's actually run
- Every stage quantified: conversion, drop-off, and where the revenue is lost
- Stage, definition and reporting design, built with your team
- A tooling review: what you pay for, what's used, and what can be cut
- A prioritised 90-day roadmap with owners
- A working session with your leadership team

Scope: five areas assessed in a 30-minute diagnostic conversation on 4 August 2026.
This is a snapshot of what was discussed — no data review or system access was involved.

[Your name]
[email] · [website]