

# RevOps Audit Checklist

## 1. GTM STRATEGY & ALIGNMENT

- Clear Ideal Customer Profile (ICP) and segmentation
- Documented value proposition per segment
- Alignment between Marketing, SDR, Sales and CS on definitions
- Agreed Qualification Criteria (MQL → SQL → Opportunity)
- Documented Handoffs across the funnel
- Commercial targets communicated & understood across teams

## 2. LEAD LIFECYCLE & FUNNEL DESIGN

- Defined lifecycle stages in CRM
- Consistent rules for stage entry / exit
- Clear ownership at each stage
- Visibility of conversion rates stuck between key stages
- Identified 'stuck' stages or leakage points
- Time-to-action SLAs for inbound and outbound leads

## 3. PIPELINE HEALTH

- Pipeline stages match your actual sales process
- Stage definitions are understood by all reps
- Pipeline ageing and velocity tracked
- Clear next steps logged on every active deal
- Dead/stale/duplicate deals regularly cleaned
- Pipeline coverage monitored (by segment + rep)

## 4. ROUTING, TERRITORIES & OWNERSHIP

- Clear routing rules for inbound (web, inbound SDR, marketing)
- Fair and structured outbound territories (if applicable)
- Lead ownership rules enforced within CRM
- Auto-assignment/round-robin set up where possible
- SLA monitoring for speed-to-lead and speed-to-response
- Visibility when leads sit untouched or assigned

## 5. DATA QUALITY & CRM HYGIENE

- No major duplicate accounts or contacts
- Required fields completed at each stage
- ICP attributes tracked (industry, size, region)
- Consistent naming conventions (accounts, deals, activities)
- Accurate close dates and forecast categories
- Team-wide adoption of CRM processes

## 6. FORECASTING & REPORTING

- Clear forecasting methodology (commit, best case, upside)
- Deal risk indicators captured (champion, use case, timeline)
- Visibility into rep-level vs. team-level forecasts
- Rolling 3-month forecast accuracy tracked
- Dashboards exist for pipeline, funnel, and forecast
- Leadership has a single source of truth for GTM metrics

## 7. SYSTEMS & TOOLING

- HubSpot / Salesforce/CRM configured to match current process
- Automated workflows for basic lifecycle transitions
- Integrations (meetings, sequencers, enrichment) working properly
- Activity tracking enabled (calls, emails, meetings)
- Tool stack reviewed for redundancy and cost

## 8. HANDOFFS & CUSTOMER SUCCESS ALIGNMENT

- Documented handoff from Sales → CS
- Clear definition of "closed-won readiness"
- Onboarding checklist for CS
- Feedback loop between CS and Sales
- Tracking of expansion, renewal and churn signals
- Consistent tagging of product usage or health scores

## 9. METRICS & INSIGHTS

- Core KPIs tracked (pipeline created, win rate, ACV, cycle length)
- Funnel conversion benchmarks known
- Rep performance metrics consistent and fair
- Retention and expansion metrics monitored
- Attribution definitions agreed
- Leadership has clarity on revenue drivers & bottlenecks

## 10. GOVERNANCE & REVOPS MATURITY

- Someone owns RevOps responsibilities internally
- A documented GTM operating rhythm (WBR, MBR, QBR) exists
- Change management is controlled (no ad-hoc field creation)
- Clear roadmap for improvements
- Accountability for processes and data hygiene
- External RevOps support in place (consultant) to guide long-term scale