



REVENUE REWIRED

Revenue Flow Audit



Identify, prioritize, and fix the friction slowing your revenue system.

Most companies do not stall because of effort. They stall because of drag. The fastest way to accelerate growth is not by doing more, but by fixing what slows you down. The Revenue Flow Audit helps you uncover friction inside your system, focus on the one bottleneck that matters most, and design a 90-day plan to restore momentum.

How to use this audit

1. Review the five bottlenecks below.
2. Score each statement on page 2 from 1 to 5 (1 means severe friction, 5 means smooth flow).
3. Add the three scores for each bottleneck for a total out of 15.
4. Identify your lowest-scoring area. That is where your next 90 days should start.
5. Use page 3 to design your Flow Fix and page 4 to build your 90-day plan.

The 5 Bottlenecks Slowing Your Revenue Flow

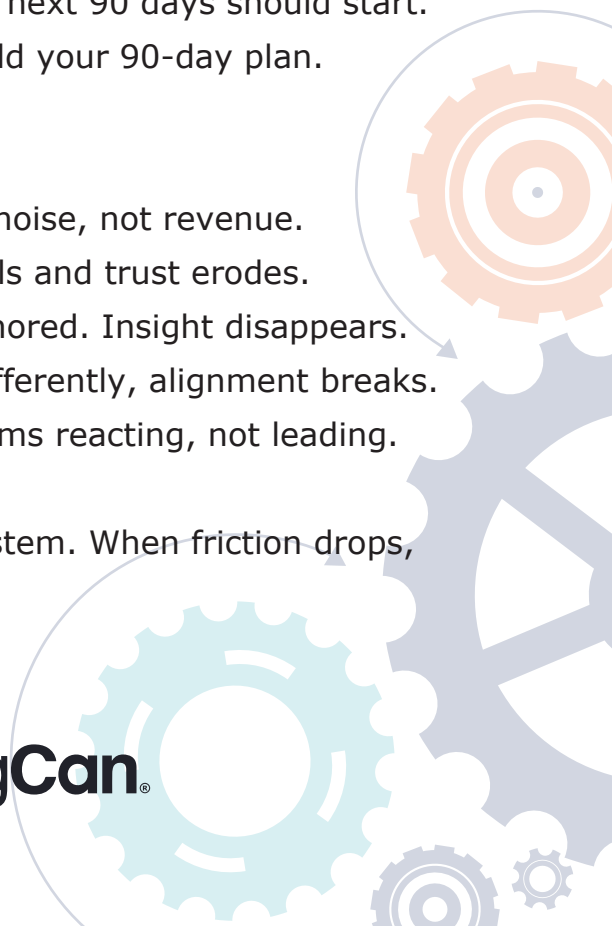
1. The Volume Trap – More leads without clarity create noise, not revenue.
2. The Ghost Handoff – Deals close, but onboarding stalls and trust erodes.
3. The CRM Swamp – Data is scattered, outdated, or ignored. Insight disappears.
4. The Metrics Misfire – Each team measures success differently, alignment breaks.
5. The Reactive Rhythm – No shared cadence keeps teams reacting, not leading.

Flow First isn't just a mindset. It's how you lead your system. When friction drops, velocity rises.

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The Flow Map: Where Friction Hides



Every revenue system runs through five zones. For each bottleneck below, rate the three statements from 1 to 5 based on how consistently they describe your business today (1 means severe friction, 5 means smooth flow). Add those three scores for a total out of 15.

Once you have scored all five bottlenecks, look for your lowest total. That is where friction is highest and where your next 90-day focus should begin.

Scoring Key

- 1 = Severe friction
- 2 = Inconsistent flow
- 3 = Functional but slow
- 4 = Mostly smooth
- 5 = Clean, fast, and aligned

Bottleneck 1: The Volume Trap (Marketing to Sales) _____ / 15

- We focus on lead quality, not volume. _____
- Sales and marketing agree on what defines a qualified lead. _____
- Our ICP drives every campaign decision. _____

Bottleneck 2: The Ghost Handoff (Sales to Operations) _____ / 15

- Every client transition happens within 24 hours of closing. _____
- Operations receives deal context before kickoff. _____
- Our onboarding process is consistent and documented. _____

Bottleneck 3: The CRM Swamp (Data & Systems) _____ / 15

- CRM data is current, complete, and trusted. _____
- We use clear deal stage definitions across all teams. _____
- Dashboards show accurate, real-time pipeline visibility. _____

Bottleneck 4: The Metrics Misfire (Leadership Alignment) _____ / 15

- All departments share a single revenue scorecard. _____
- Marketing metrics align with pipeline velocity, not vanity KPIs. _____
- Leadership reviews revenue outcomes, not departmental wins. _____

Bottleneck 5: The Reactive Rhythm (Cadence & Execution) _____ / 15

- We follow a consistent quarterly rhythm for planning and review. _____
- Weekly meetings surface friction, not just KPIs. _____
- Each team knows its role in maintaining system flow. _____

Your lowest total shows where drag is slowing your system most. Start there, fix that friction first, and you will feel the biggest lift in flow.

Design Your Flow Fix



Use this system to fix the one bottleneck slowing your revenue flow most. Once you install it, move to the next one.

Step 1: Name Your Focus Area

Which bottleneck are you addressing first?

- ☐ The Volume Trap
- ☐ The Ghost Handoff
- ☐ The CRM Swamp
- ☐ The Metrics Misfire
- ☐ The Reactive Rhythm

Step 2: Define the Friction

What exactly is happening that slows your flow in this area? Describe the main symptom in one sentence.

Step 3: Identify the Downstream Impact

Which part of your revenue flow is affected most by this friction? (Mark one)

- ☐ Lead conversion ☐ Deal velocity ☐ Customer onboarding ☐ Forecast accuracy
- ☐ Team efficiency ☐ Sales productivity ☐ Customer retention ☐ Customer growth

Step 4: Define the Fix

What change would remove this friction? Write your fix clearly and simply. Examples:

- Redefine MQL criteria
- Standardize sales-to-service handoff
- Clean and re-stage CRM pipeline
- Consolidate dashboards into one scorecard
- Align meeting rhythm and quarterly planning

Step 5: Assign Ownership and Timeline

Who owns this fix? _____

When will it be implemented? _____

How will success be measured? _____

Reminder

Each bottleneck can be improved with this same framework. Start with one, install the fix, and once flow improves, move to the next friction point. When flow improves, revenue follows.

Next 90 Days: Rewiring for Flow



The fastest path to momentum is focus. You do not need to fix everything. Start with one bottleneck, remove the friction, and build a rhythm that keeps it from returning.

Weeks 1–2: Map the Machine

Bring your revenue team together. Chart the full buyer journey from first touch to renewal. Mark every handoff and note where clarity fades or progress slows. Do not debate. Just identify friction.

Weeks 3–4: Choose One Fix

Select the bottleneck that creates the most downstream pain. Define ownership, success metrics, and timing. Make it visible to everyone on the team so accountability is shared.

Weeks 5–6: Implement Fast

Deploy your fix quickly. Perfect is slower than progress. The win comes from movement, not meetings.

Weeks 7–8: Inspect and Adjust

Track the effect. Ask your team, “Does this make our system feel lighter?” If not, adjust. The goal is ease, not just output.

Weeks 9–12: Install the Rhythm

Lock in what worked. Update your processes, dashboards, and training. Reinforce it until it becomes second nature. Then choose the next friction point and repeat.

Your 90-Day Flow Formula

1. One friction point at a time.
2. One system fix per quarter.
3. One unified rhythm across teams.

When you lead with flow, you do not just hit your number. You make it repeatable.

Need help building your 90-day flow plan? Let’s map it out together with clear steps and fast execution.

[Book a Revenue Flow Strategy Call](#)

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