GTMRH Advisory

REVENUE ORG AUDIT · PLAN AND CHECKLIST TEMPLATE

# How the entire GTM system converts customers into *durable revenue.*

A step-by-step plan for running the audit, with a checklist for every area: kickoff access, twelve audit areas, the three tests, and what leadership receives.

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THE 10-BOX FRAMEWORK

# Identifying *opportunity areas*

Every finding is viewed internally (how the team runs) and externally (how it meets the customer).

| LENS | INSIDE YOUR REVENUE TEAM | WHERE IT MEETS THE MARKET |
|---|---|---|
| People | Org design, roles, capability, enablement | ICP, buyer personas, multithreading |
| Process | Rules of engagement, pipeline and deal review, planning | Sales methodology, land-and-expand motion |
| Structure | Comp, incentives, handoffs | TAM/SAM, segmentation, territories, ABM |
| Tech & tooling | Stack audit, vendors, workflow integration | Data enrichment, customer and product feedback |
| Performance | KPIs, forecasting, QBR and board reporting | Health scores, conversion, churn root cause |

THE PLAN

# How an engagement *runs*

Map the current state before designing the future state.

1

WEEK 1

## Plan

Scope, success criteria, access, weekly executive check-in

2

WEEKS 2–6

## Current state

Interviews, operational audit, handoff mapping, org and comp baseline

3

WEEKS 6–12

## Target state

Org chart, roles and JDs, account allocation, comp plans, playbooks

4

MONTHS 3–6

## Implement

Rollout plan, comp contracts, training, communication, cutover

5

ONGOING

## Measure

Bi-weekly KPI updates, then monthly against success criteria

KICKOFF: DAY 1 CHECKLIST

# Most audits stall *waiting on access.*

Request everything on day one, and interview every level, not just leadership.

## Access

6 items

- [ ] Email and SSO
- [ ] CRM and wiki
- [ ] Slack, Gong, techstack
- [ ] HRIS and org tools
- [ ] Reporting and BI
- [ ] Finance contact for cost to serve

## Documents

8 items

- [ ] Sales and CS playbooks
- [ ] Org chart and book mapping
- [ ] Capacity model
- [ ] Roles, JDs, leveling
- [ ] Comp plans and quotas
- [ ] Account list with ARR and tier
- [ ] Training and onboarding
- [ ] Board and KPI packs

## Interviews

6 items

- [ ] CEO and exec team
- [ ] Sales, AM, CS leaders
- [ ] ICs at every level and tenure
- [ ] Onboarding and delivery
- [ ] RevOps and finance
- [ ] Product and HR

AUDIT AREAS · 1 OF 4

# *Foundation*

Business context, ownership, and path to value

## *01* Exec alignment

- ☐ Vision and top priorities
- ☐ ARR, growth, GRR and NRR
- ☐ Concentration and revenue at risk
- ☐ ICP, segments, ACV
- ☐ Primary constraint

*What does success look like in 6–12 months?*

## *02* GTM org and accountability

- ☐ Role charters versus reality
- ☐ Renewal, expansion, escalation ownership
- ☐ Ratios, books, and capacity
- ☐ Spans and reporting lines
- ☐ Duplication and shadow ownership

*Who owns the customer, revenue, and outcome at each stage?*

## *03* Customer journey and TTV

- ☐ Owner, SLA, exit criteria per stage
- ☐ Closed won to kickoff to go-live
- ☐ Go-live to first value
- ☐ Onboarding completion and slippage
- ☐ Shared KPIs at kickoff

*How long until the customer sees measurable value?*

# *Customer motion*

Where deals hand off, who gets served first, and who stays

## *04* Sales to post-sale handoff

- ☐ Business case, goals, sponsor documented
- ☐ Commitments visible to CS
- ☐ Internal kickoff with full delivery team
- ☐ RACI across sales, CS, delivery
- ☐ Approval steps on deliverables

*Could someone understand the deal from the CRM alone?*

## *05* Segmentation and prioritization

- ☐ Segment by ARR, ICP, complexity
- ☐ Cost to serve by segment
- ☐ Account tiering criteria
- ☐ Prioritization and expedite rules
- ☐ Coverage model and capacity

*When accounts compete for one team, who goes first?*

## *06* Retention, health, and risk

- ☐ GRR, NRR, churn reasons
- ☐ Leading versus lagging indicators
- ☐ SLAs tied to business outcomes
- ☐ Voice of customer ownership
- ☐ Save plans and forecast accuracy

*Can you predict churn 90–180 days out?*

# *Growth economics*

How the company grows accounts and rewards the right behavior

## *07* Expansion and lifetime value

- ☐ Expansion ARR and pipeline
- ☐ Signals and white space
- ☐ Reselling starts by month six
- ☐ Account maturity plan to month twelve
- ☐ QBR and EBR strategy

*Is post-sale a revenue engine or a service function?*

## *08* KPIs, comp, and incentives

- ☐ Variable comp by GTM role
- ☐ Renewal and expansion incentives
- ☐ Individual versus team goals
- ☐ Conflicts and double-crediting
- ☐ Tasks mapped to company KPIs

*Does pay reward the behavior you want?*

## *09* Operating cadence

- ☐ Weekly risk and renewal review
- ☐ Pipeline and account planning
- ☐ Product feedback review
- ☐ MBR, QBR, steering committee
- ☐ Owners and actions per meeting

*Does every meeting end with a decision?*

# *Systems and people*

The tools, feedback loops, and talent that make change stick

## *10* Process, tech, and automation

- ☐ CRM, CS, support, BI stack
- ☐ Data quality and integrations
- ☐ Manual and duplicate work
- ☐ Deliverables to centralize
- ☐ Vendor, renewal, infosec review

*Keep, fix, automate, centralize, offload, or eliminate?*

## *11* Product and customer feedback

- ☐ VOC capture and categories
- ☐ Revenue and risk on requests
- ☐ Prioritization cadence
- ☐ Closed-loop communication
- ☐ Roadmap visibility for GTM

*Does product hear data or the loudest voice?*

## *12* Talent, enablement, and change

- ☐ Competencies and career paths
- ☐ Manager training
- ☐ First-90-days coverage
- ☐ Certification and training
- ☐ Succession and change comms

*Can people run the new model?*

QUICK DIAGNOSTICS

# Three questions that *expose the system*

Run these early. The answers tell you where to dig first.

*01*

## CRM test

Pull ten recent closed-won deals. Can someone else tell why they bought, what success means, what was promised, and what happens next?

*02*

## Churn test

Can the company predict churn 90–180 days before renewal, or does it find out in the renewal conversation? Is there a pattern for why at least 80% of lost customers churn?

*03*

## Ownership test

Who owns the customer, the revenue, and the outcome at every point in the lifecycle?

DELIVERABLES

# What *leadership receives*

Five executive outputs, not one enormous audit document.

| | | |
|---|---|---|
| *01* | Current state | ☐ What happens today across people, process, tech, customers, economics |
| *02* | Findings | ☐ What works, what is broken, missing, or duplicated |
| *03* | Root causes | ☐ Why retention, TTV, expansion, and productivity behave as they do |
| *04* | Target state | ☐ The org, journey, and operating model to run on |
| *05* | Focus roadmap | ☐ Prioritized initiatives with impact, effort, owner, timing |

**REVIEW CADENCE** Kickoff · Monthly · Quarterly / ongoing · Phase 1 and 2 end

EXAMPLE FOCUS ROADMAP

# Prioritized *transformation roadmap*

Every initiative gets an impact rating, effort level, named owner, and timing.

| ISSUE / INITIATIVE | HORIZON | BUSINESS IMPACT | EFFORT | OWNER | TIMING |
|---|---|---|---|---|---|
| ICP work | Now | High | Low to medium | Named owner | 0–30 days |
| Expansion motion | Next | High | Medium | Named owner | 30–90 days |
| Handoff process | Build | High | High | Executive owner | 3–6 months |
| Manager trainings | Scale | Strategic | High | Executive team | 6–12 months |

FROM DIAGNOSIS TO DURABLE REVENUE

# Growth is a team sport. *Let's build yours.*

PHASE 1

## Diagnose → Design

Audit the current state, find root causes, and agree on the target model.

PHASE 2

## Build → Implement → Measure

Install playbooks, roles, and comp, then track KPIs until the change holds.

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