

The Revenue Readiness Self-Audit: Comprehensive Playbook

This comprehensive audit is a prescriptive framework designed to assess the maturity and scalability of your Go-to-Market (GTM) engine. It delivers a single, actionable metric - the **Revenue Readiness Score** (out of 10.0) - based on a rigorous, five-phase process.

1. The Revenue Readiness Health Scorecard (Summary)

The total possible score is points across the five phases. The Revenue Readiness Score is calculated as Total Points / 10.

Score Range (100 Points)	Revenue Readiness Score (10.0)	Interpretation & Action
80-100 Points	8.0 - 10.0 (A)	Ready to Scale. You have predictable economics, robust process, and an efficient team. Focus on hiring velocity and market expansion .
60-79 Points	6.0 - 7.9 (B)	Scaleup Potential. Your economics are sound, but process rigor is missing. Immediate Focus: Enforce Mandatory Exit Criteria and Weekly Deal Inspection .
40-59 Points	4.0 - 5.9 (C)	Uncertain Foundation. Core financial metrics (LTV:CAC) are likely stressed, or your team efficiency is low. Immediate Focus: Stop hiring. Redefine ICP/Messaging .
<40 Points	<4.0 (D)	Startup Chaos. Your revenue is unpredictable, and the business model may be unsustainable. Immediate Focus: Freeze all S&M spending. Refocus on achieving Product-Market Fit .

2. The 5-Phase Actionable Audit Walkthrough & Scoring

This section provides the step-by-step instructions, defining what data to pull, what to look for, and how to assign the points for each metric.

Phase 1: Financial & Scalability Health (Max 20 Points)

Goal: Validate the foundational economics of customer acquisition. Ensure you are buying customers profitably and efficiently. **Red Flags:** LTV:CAC ratio is below 3:1, or CAC Payback is greater than 12 months.



Metric	Required Data & Source	Max Points	Scoring Criteria
LTV:CAC Ratio	Calculated LTV and fully-burdened CAC (Marketing, Sales, Onboarding costs) from Finance/ERP .	8	$\geq 3:1$ (8 pts); 2:1 to <3:1 (4 pts); <2:1 (0 pts).
CAC Payback Period	CAC, Monthly Recurring Revenue (MRR), and Gross Margin % from Finance/ERP .	5	≤ 12 months (5 pts); 13–18 months (3 pts); >18 months (0 pts).
Net Revenue Retention (NRR)	Current month's revenue vs. same customers' revenue 12 months ago (including upsell, cross-sell, and churn) from Finance/CRM .	5	$\geq 110\%$ (5 pts); 100% to <110% (2 pts); <100% (0 pts).
Pipeline Coverage	Current qualified pipeline value vs. next quarter's total quota from CRM Forecasting Report .	2	$\geq 4x$ (2 pts); 3x to <4x (1 pt); <3x (0 pts).
Subtotal		20 Points	

Phase 2: Sales Process & Forecasting Rigor (Max 20 Points)

Goal: Map the current sales process, identify where deals stall, and assess the reliability of forecasting. **Red Flags:** Forecast Accuracy below 80%, or a significant percentage of deals stuck in a single stage (e.g., "Demo Scheduled").

Metric	Required Data & Source	Max Points	Scoring Criteria
Forecast Accuracy	Deviation between final 'Commit' forecast and actual revenue closed over the last 3 quarters from CRM Reporting .	8	$\leq 10\%$ deviation (8 pts); 11%–20% deviation (4 pts); >20% deviation (0 pts).

Funnel Conversion (SQL → Opp)	Rate of Sales Qualified Leads converting into open Opportunities in the CRM from CRM Funnel Report .	5	≥25% (5 pts); 15% to <25% (2 pts); <15% (0 pts).
Sales Process Defined	Audit sales documentation for a 5-7 stage process and verifiable Mandatory Exit Criteria for each stage (e.g., 'Champion Identified' to exit Stage 2).	4	Fully defined/enforced (4 pts); Defined, not fully enforced (2 pts); Not defined/Ad-hoc (0 pts).
Deal Hygiene (Next Step)	Percentage of open Opportunities that have a defined Next Step Date and Note in CRM (check 50 random deals).	3	≥90% (3 pts); 70% to <90% (1 pt); <70% (0 pts).
Subtotal		20 Points	

Phase 3: Market Clarity & Messaging (Max 20 Points)

Goal: Verify alignment between your Ideal Customer Profile (ICP), core value proposition, and competitive reality.
Red Flags: Win Rate below 20%, high variance in Win Rate between reps, or an ICP based on guesswork, not LTV data.

Metric	Required Data & Source	Max Points	Scoring Criteria	
ICP Definition Quality	Documentation of ICP, including demographic/firmographic data, confirmed by analysis of Top 10% LTV customers from CRM/Finance .	6	Clear, LTV-driven, and documented (6 pts); Defined but not LTV-driven (3 pts); Ambiguous/None (0 pts).	

Win Rate	Closed Won/(Closed Won+Closed Lost)	over the last 12 months from CRM Opportunity Report .	5	≥25% (5 pts); 15% to <25% (2 pts); <15% (0 pts).
Message Architecture	Review marketing and sales assets (website, decks) for a single, quantifiable statement of value (e.g., "We reduce processing time by 40%, not "We have best-in-class features").	5	Quantifiable & clear (5 pts); Clear but generic/feature-focused (2 pts); Unclear/inconsistent (0 pts).	
Pricing Friction Score	Analyse pricing model documentation: does it create low adoption friction and high expansion potential (upsell/cross-sell) for the ICP?	4	Low friction/High expansion potential (4 pts); Some friction/Some potential (2 pts); High friction/Low expansion (0 pts).	
Subtotal		20 Points		

Phase 4: Talent & Enablement Engine (Max 20 Points)

Goal: Assess the capability, structure, and coaching effectiveness of the sales team and management. **Red Flags:** Quota Attainment below 60%, high Voluntary Attrition, or a Ramp Time exceeding 6 months.

Metric	Required Data & Source	Max Points	Scoring Criteria
Quota Attainment	Percentage of fully-ramped AEs hitting 100% quota over the last 12 months from Sales Manager Reports .	7	≥60% (7 pts); 40% to <60% (3 pts); <40% (0 pts).

Sales Rep Ramp Time	Average months to reach 80% of quota for all AEs hired in the last 18 months from HR/Manager Records .	6	≤6 months (6 pts); 7–9 months (3 pts); >9 months (0 pts).
Voluntary Attrition Rate	Reps who choose to quit over 12 months (excluding performance terminations) from HR Data .	4	≤10% (4 pts); 11%–20% (2 pts); >20% (0 pts).
Coaching Cadence	Audit Sales Managers' calendars and 1:1 notes for structured Weekly Deal Inspection using a framework (MEDDIC, BANT, etc.).	3	Fully defined and weekly enforced (3 pts); Ad-hoc or missing framework (1 pt); None (0 pts).
Subtotal		20 Points	

Phase 5: Technology & Compliance (Max 20 Points)

Goal: Judge the reliability of the sales stack, data governance, and strategic alignment of compensation/territories. **Red Flags:** Lack of mandatory fields in CRM, redundant software licenses, or compensation plans that incentivise the wrong behavior (e.g., rewarding volume over LTV).

Metric	Required Data & Source	Max Points	Scoring Criteria
Data Integrity Automation	Check CRM rules: are mandatory fields/automation ensuring ≥90% data completeness for core fields ('Close Date', 'Next Step', 'Value Prop')?	8	Fully automated/Enforced (8 pts); Some enforcement/Manual checks needed (4 pts); None/Garbage in, garbage out (0 pts).
Tech Stack Efficiency	Review all current GTM licenses: is there redundancy or are core tools (e.g., data enrichment) missing?	6	Optimised MVP stack (6 pts); Functional but with redundancy (3 pts); Missing core tools (0 pts).

Compensation Clarity	Audit comp plan documents: Is the plan formally documented and tied to strategic goals (NRR/ICP), not just simple bookings?	4	Clear, documented, and aligned (4 pts); Documented but generic (2 pts); Informal/Verbal (0 pts).
Territory Strategy	Review the rules for account/lead split: are they simple, documented, and do they minimise rep conflict?	2	Defined and understood (2 pts); Undefined/Ad-hoc (0 pts).
Subtotal		20 Points	

3. The Operational Toolkit: Essential Deliverables

The audit's value is in its actionability. These are the mandatory templates and outputs that must be created or verified to score highly in the relevant sections.

A. Sales Process Rigor Tools (Phase 2)

Deliverable	Description & Goal
Standardised Discovery Call Script/Flow	A one-page document detailing the exact sequence for an initial call. It must include 5 mandatory questions that must be answered to progress a deal (e.g., Pain, Vision, Consequence, Budget, Decision Process). This standardises sales quality.
Mutual Action Plan (MAP) Template	A shared document template used in every qualified deal that outlines the buyer's steps, seller's steps, owners, and dates for the next 5-7 milestones. Goal: Shifts accountability to the buyer and reduces sales cycle time.

B. Manager Accountability Tools (Phase 2 & 4)

Deliverable	Description & Goal



Sales Manager Scorecard	A daily/weekly dashboard focusing on 3 leading indicators: 1) Pipeline Coverage, 2) Percentage of deals with a 'Next Step Date' set, and 3) Average Deal Age (to spot stagnation).
Voice of Customer (VoC) Requirement	Require 5 mandatory interviews with 1) a top-tier customer, 2) a recently churned customer, and 3) a deal lost to competition. Goal: Objectively validate the value proposition and identify real competitive threats.

C. Talent & Scaling Tools (Phase 4)

Deliverable	Description & Goal
30-60-90 Day Ramp Plan Template	A standardised plan for all new hires (AE/SDR). Includes specific, measurable goals for each month. Example: Day 30: Pass Product Certification, Day 60: 25% Quota, Day 90: 50% Quota.
Territory Assignment Policy	A simple, documented policy defining how leads/accounts are split (e.g., by company size, by industry vertical). Goal: Eliminate internal territory conflict and focus sales energy.

D. Benchmarks for Talent Decisions (For Context)

Metric	Target (B2B SaaS)	Action if Below Target
Quota Attainment	≥60% of fully-ramped AEs	Action: Review quotas, lead quality, and sales enablement/training.
AE Ramp Time	≤6 months	Action: Overhaul onboarding to focus on process and role-playing, not just product knowledge.
Voluntary Attrition	≤10%	Action: Immediately investigate compensation, culture, and management coaching quality.

Win Rate	20% to 30%	Action: If variance between reps is high, coach all reps on the exact process used by top performers. If overall rate is low, re-examine ICP/value prop.
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4. The 90-Day Action Plan Template (From Score to Action)

Use the three lowest-scoring sections (your **Critical Gaps**) to fill out this action plan. The goal is to address the most urgent operational/financial weaknesses first by implementing the necessary **Operational Toolkit Deliverables**.

Priority	Critical Gap (Lowest Scoring Phase)	Goal (Metric Improvement)	Deliverable Implemented (from Section 3)	30-Day Task (Setup)	60-Day Task (Rollout)	90-Day Task (Measurement)
#1	E.g., Phase 2: Process Rigor (Score: 5/20)	Improve Funnel Conversion Rate by 5%	Mutual Action Plan (MAP) Template	Design MAP Template and train Sales Managers.	Require MAP on 50% of qualified deals in CRM.	Review average Sales Cycle time for MAP deals vs. Non-MAP deals.
#2	E.g., Phase 4: Talent Engine (Score: 8/20)	Reduce AE Ramp Time by 2 months	30-60-90 Day Ramp Plan Template	Finalise 30-60-90 Day Plan and secure budget for coaching tools.	Onboard next 3 hires using the new plan exclusively.	Review the 90-day progress of new hires against the previous cohort.
#3	E.g., Phase 3: Market Clarity (Score: 10/20)	Increase Win Rate by 2%	Voice of Customer (VoC) Requirement	Conduct 5 mandated VoC interviews (Churn/Win/Loss).	Integrate 3 key findings into the Core Value Proposition statement.	Test the new Core Value Proposition in the next 10 Discovery Calls.