

# RevOps Audit

Your Businesses'  To Maximizing Revenue





## Introduction

Pilots use checklists to fly all sorts of planes and so do Astronauts. By using this checklist you can gain a quick understanding of the health of your marketing, sales and customer service operations. It's not a definitive review, but a good snapshot of where you are and where you need to be in the future.

## Why Use a Checklist

Harnessing the power of effective sales management necessitates the meticulous prioritization of tasks, coupled with vigilant tracking of their progression. This can often manifest in the form of a robust sales activities checklist, enabling an organized, panoramic view encompassing a spectrum of tasks.

When you use and share this checklist, you and your team will have clear transparency on objectives, streamlined workflows and ultimately better outcomes.

## How to Use this Checklist

Go through each of the 16 items in the checklist one at a time. Fill in the number of points in each box as it corresponds to each item within your organization.

Use the points system to tally up your points for each item. It's that simple.

**A perfect score would tally 160 points.**

Item Name	Description	Present 5 Points	Works Well 5 Points	Needs Work 3 Points	Total Points
<b>Playbook</b>	Is there a Playbook that documents your processes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>CRM</b>	Is there a CRM for all customer and prospect interactions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Analytics</b>	How are you measuring the performance of the business?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Onboarding</b>	What type of training is available to a new team?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>CRM Custom Field Definitions</b>	Is there a campaign schedule and calendar? For how long?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Role Specialization</b>	How are people organized across the functions, are they RPRS?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Compensation System</b>	How are compensation processes developed for each function and role?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Customer Success Playbook- Inbound Customer Communication</b>	How is your organization managing inbound customer requests?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Lead Scoring</b>	How does marketing determine if an inbound lead is ready to buy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Item Name	Description	Present 5 Points	Works Well 5 Points	Needs Work 3 Points	Total Points
<b>Campaign Schedule</b>	Is there a campaign schedule and calendar? For how long?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Content Strategy</b>	What are we doing for unique content?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Media Types</b>	What channels do we use to communicate with prospects and clients?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Sales Enablement System</b>	Do we have enablement tools like Outreach or Salesloft?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Channel Management System</b>	How are we managing channel sales, if at all?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Scripts for Calls</b>	Who's in charge of creation? How are they used? Who reviews?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Sequences/ Cadences</b>	Do we use these types of plays for inbound and Outbound purposes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## Here's what your Score means:

Less than 70 - you've got a lot of areas that need creation, improvement or repair.

Between 71 and 120 - you've got a lot of the main tools you need, but likely need to codify your processes and how you use them.

Between 121 and 140 - You're on the right track with your tools and processes, but likely need a second set of eyes to confirm that you've got a good system in place.

Over 141 - you're likely doing everything you need and just need to keep the flywheel in place.