REVENUE SYSTEMS AUDIT

Illustrative Preview

HARBORLINE COMMERCIAL SERVICES

A fictional established B2B facilities-services company

GETTING & CONVERTING	KEEPING & GROWING	RUNNING IT AS A SYSTEM

WHAT THIS PREVIEW SHOWS

The diagnosis, Journey Map, scorecard, evidence trail, and one selected recommendation from a complete Revenue Systems Audit. The full illustrative report contains 22 pages of findings, priorities, implementation guidance, measures, and leadership decisions.

Prepared by Pat McGraw

Revenue Systems Advisor for SMBs | pat-mcgraw.com

01 / EXECUTIVE DIAGNOSIS

The business does not need more demand first

Harborline creates enough interest to support growth, but momentum is lost after inquiry and leadership lacks the visibility needed to intervene consistently.

45	19 hrs	41%	28%
monthly inquiries	median response	active opportunities with no next action	proposal-to-close

Core diagnosis

Harborline's primary constraint is not awareness. It is the absence of explicit ownership and operating rules between inquiry, follow-up, and pipeline review. Experienced leaders recover problems manually, but the company cannot reproduce that behavior consistently.

WHAT WORKS	WHERE IT BREAKS	BUSINESS CONSEQUENCE
Relevant market position, steady referrals, credible delivery, and adequate inquiry volume.	No response standard; follow-up depends on memory; stages and next actions are incomplete.	Good opportunities receive uneven treatment and future revenue cannot be explained with confidence.

Leadership implication Do not approve a major campaign, CRM replacement, or sales hire until the current flow can be operated and measured consistently.

02 / REVENUE JOURNEY MAP

Where momentum breaks across the customer journey

The Journey Map connects the customer experience with internal ownership, systems, and the handoffs most likely to create avoidable loss.

1. DISCOVER	2. INQUIRE	3. EVALUATE
CUSTOMER Referral, search, partner	CUSTOMER Form, phone, inbox	CUSTOMER Scope, visit, comparison
OWNER Marketing partner	OWNER Office coordinator	OWNER Owner / estimator
BREAKPOINT Attribution incomplete	BREAKPOINT No response standard	BREAKPOINT Memory-based follow-up

4. BUY	5. ONBOARD	6. STAY & GROW
CUSTOMER Approve and schedule	CUSTOMER Kickoff and first service	CUSTOMER Renew, expand, refer
OWNER Owner -> operations	OWNER Operations manager	OWNER Informal account owner
BREAKPOINT Readiness varies	BREAKPOINT No shared 30-day standard	BREAKPOINT No lifecycle triggers

Highest-friction transition

INQUIRE-to-EVALUATE is the earliest and most consequential break. Increasing demand first would feed more opportunities into the same inconsistent process.

Interpretation

The problem is not one broken tactic. It is a series of weak handoffs with no shared operating rules. The first intervention should create ownership and observable behavior across those handoffs.

03 / REVENUE SYSTEMS SCORECARD

Twelve components. One connected diagnosis.

Scores summarize operating capability. The maturity band, supporting evidence, and business consequence matter more than a difference of a few points.

FUNCTION	COMPONENT	SCORE	BAND
Getting & Converting	**Lead Capture & Volume**	**64 / 100**	Foundation
Getting & Converting	**Speed to Lead**	**38 / 100**	Priority
Getting & Converting	**Follow-Up System**	**31 / 100**	Priority
Getting & Converting	**Conversion & Close**	**52 / 100**	Watch
Getting & Converting	**Messaging Alignment**	**68 / 100**	Foundation
Keeping & Growing	**Onboarding System**	**57 / 100**	Foundation
Keeping & Growing	**Retention & Lifecycle**	**61 / 100**	Foundation
Keeping & Growing	**Expansion & Upsell**	**42 / 100**	Watch
Keeping & Growing	**Customer Experience**	**70 / 100**	Foundation
Running as a System	**Revenue Predictability**	**35 / 100**	Priority
Running as a System	**Sales & Marketing Alignment**	**40 / 100**	Watch
Running as a System	**Operational Consistency**	**33 / 100**	Priority

How scores are produced

Each component is assessed across ownership, process definition, execution consistency, data visibility, measurement, and improvement cadence. The complete report includes the anchored rubric, a worked scoring example, evidence confidence, and interpretation guardrails.

Priority logic The lowest score is not automatically first. Priorities reflect business impact, evidence strength, dependencies, urgency, effort, and owner capacity.

04 / EVIDENCE-TO-ACTION TRACEABILITY

Why the priorities follow from the evidence

The audit trail allows leadership to challenge an assumption without discarding the entire diagnosis.

EVIDENCE	FINDING	PRIORITY	RESPONSE
19-hour median inquiry response	Response has no operating standard	**P1**	Owner, backup, response target
Only 36% received follow-up beyond first attempt	Follow-up is memory-based	**P1**	Sequence, disposition, next action
12 of 29 active opportunities lacked next action	Pipeline cannot direct action reliably	**P1/P2**	Required action, stage, exception review
Five proposals older than 21 days lacked disposition	Stage movement is not decision-grade	**P2**	Decision date, aging view, disposition
Three onboarding checklists differed	First-30-day experience varies	**P3**	Common readiness and milestones
Lifecycle opportunities required manual review	Retention and expansion are reactive	**P3**	Account-trigger pilot

Decision rule If implementation evidence contradicts a finding, revise the recommendation. The Audit is a structured decision hypothesis, not a doctrine.

What the preview intentionally withholds

- The complete findings across all three Revenue Functions.
- The prioritization matrix and economic sensitivity analysis.
- The second and third recommendations, 90-day plan, measures, cadence, dependencies, and decision session.

05 / SELECTED RECOMMENDATION

Create one response and follow-up control system

This is one of three complete recommendations. Its objective is to ensure every legitimate inquiry receives timely ownership, appropriate persistence, and an explicit disposition.

DESIGN ELEMENT	RECOMMENDED STANDARD
Single intake view	Route web forms, inbox inquiries, and logged phone inquiries into one visible queue.
Ownership	Assign an accountable owner and named backup coverage.
Response target	Test a two-business-hour acknowledgment target during coverage periods before publishing a promise.
Qualification disposition	Use qualified, nurture, disqualified, duplicate, or unable-to-serve with a short reason.
Next-action rule	No active opportunity remains open without an owner and dated next action.
Follow-up minimum	Standardize timing and stop conditions while allowing judgment in message content.
Exception path	Show overdue responses and missing actions in a daily view and weekly review.

How success would be tested

- Response-time distribution by channel.
- Owner and next-action completeness.
- Follow-up completion and documented dispositions.
- Qualified-opportunity conversion after the operating behavior becomes consistent.

Expected learning

Within 30 days, leadership should know whether response and follow-up inconsistency materially contributes to conversion loss. That is evidence—not a promised lift.

THE COMPLETE AUDIT

What leadership receives beyond this preview

The full deliverable is designed to increase a leader's capacity to make sound decisions grounded in the business's actual operating evidence.

FULL AUDIT COMPONENT	LEADERSHIP VALUE
Evidence inventory and limitations	What was reviewed, what remains uncertain, and how confidence affects decisions.
Complete diagnosis	Findings across Getting & Converting, Keeping & Growing, and Running It as a System.
Scoring methodology	Anchored maturity rubric, worked example, confidence levels, and interpretation guardrails.
Priority decisions	Constraint matrix, illustrative economics, dependencies, and an explicit not-now list.
Three recommendations	Owners, standards, measures, guardrails, and expected learning.
Ninety-day plan	Sequenced work, decision gates, capacity rules, and 30/60/90-day reviews.
Leadership working session	A facilitated decision process that tests the diagnosis, assigns owners, and establishes the first review date.

READY TO EXAMINE YOUR ACTUAL REVENUE SYSTEM?

Begin with a free 60-minute Strategic Briefing. We will clarify the decision you are facing, what evidence is available, and whether a Revenue Systems Audit is the right next step.

pat-mcgraw.com/strategic-briefing/

Harborline Commercial Services is fictional. This preview is not a client case study, testimonial, guarantee, or performance claim.