

Revenue Function

Self-Audit

Score your revenue function across five critical areas. Find out where the gaps are before you hire a consultant, a sales leader, or your next rep.

Ben Zarif

Fractional Commercial Leader · UNFYS Consulting
unfys.com

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HOW TO SCORE THIS AUDIT

Instructions

Each question is scored on a 1–4 scale. Answer based on the current reality of your business, not where you'd like it to be. Score 1 if the statement is largely false, 4 if it's largely true. There's no failing grade — the purpose is to surface where to focus.

Time required: 20–30 minutes. Do this alone or with a co-founder — not with your sales team present, as their answers tend to be more optimistic than the data supports.

1 Not in place / largely false	2 Partially in place / inconsistent	3 Mostly in place / mostly true	4 Fully in place / clearly true
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Five areas, *twenty questions*

O1 CRM & PIPELINE HEALTH
Max 16 pts

<p>80% or more of live deals are correctly staged based on verifiable evidence, not rep optimism</p> <p>Check: pick 10 random deals and assess whether each is accurately placed</p>	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/>
<p>Every open deal has a documented owner, value, expected close date, and clear next step</p> <p>Not just "following up" — a specific action with a date</p>	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/>
<p>Pipeline stages have documented exit criteria — a deal advances because specific evidence exists, not because the rep moved it</p> <p>Each stage should have 2–4 objective criteria that must be true before progression</p>	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/>
<p>You maintain a pipeline coverage ratio of 3x or more against your quarterly revenue target</p> <p>Total qualified pipeline ÷ quarterly target. Below 3x is a structural risk, not just a execution risk</p>	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/>
<p>AREA 1 SCORE</p>	<p>— / 16</p>

O2 SALES PROCESS DOCUMENTATION
Max 16 pts

<p>The sales process (from first contact to close) is written down and accessible to all reps</p> <p>A Google Doc counts. "In my head" or "we train verbally" does not</p>	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/>
<p>There is a written ICP with specific firmographic criteria, pain triggers, and negative examples (who not to pursue)</p> <p>Without negative examples, qualification tends to be optimistic by default</p>	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/>
<p>Discovery is run consistently using a documented framework — reps use it, not just the founder</p> <p>Consistent doesn't mean identical. It means the same structure, not the same script</p>	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/>

Win/loss analysis is conducted at least quarterly and the findings are actively shaping how you sell

Not just win rate tracking — understanding why deals are won or lost and adjusting accordingly

1	2	3	4
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AREA 2 SCORE

— / 16

03 METRICS & REVENUE VISIBILITY

Max 16 pts

You know your stage-to-stage conversion rates and can identify which stage has the biggest drop-off

This is the single most useful diagnostic tool in RevOps. Most founders can't answer this

1	2	3	4
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Forecast accuracy is within 20% on a rolling 90-day basis — you know this from data, not instinct

If you've been surprised by a quarter more than once in the last 12 months, score this low

1	2	3	4
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Win rate by deal source, size bracket, and segment is available from the CRM without manual calculation

You should be able to pull this in under 10 minutes

1	2	3	4
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Average sales cycle length is tracked and you know which deals (size, source, segment) close fastest

Understanding where your fastest, cleanest revenue comes from shapes where to invest in growth

1	2	3	4
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AREA 3 SCORE

— / 16

04 TEAM & COMMERCIAL LEADERSHIP

Max 16 pts

Reps can advance deals through the pipeline and close without requiring founder involvement

Even on deals above a certain size. If founder approval is required, score this 1 or 2

1	2	3	4
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New reps are ramping to full quota contribution within 4 months of starting

9–12 months is the industry average for poorly documented processes. 3–4 months is achievable with the right infrastructure

1	2	3	4
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There is a defined commercial lead (not the founder) who owns the sales number and runs the pipeline review

Fractional CRO, VP Sales, or Head of Sales. Someone with accountability for the revenue target

1	2	3	4
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Sales and marketing agree on a written definition of a qualified lead — and both teams actually use it

Ask both separately. If you get different answers, score this 1

1	2	3	4
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AREA 4 SCORE

— / 16

05 REVENUE PREDICTABILITY

Max 16 pts

You can produce a credible 90-day revenue forecast from the CRM alone, without manual adjustment or spreadsheet overlays

If you're adjusting the CRM forecast by gut feel, that's a data quality problem, not a forecasting problem

1	2	3	4
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Revenue does not materially depend on the founder being personally available — it continues at a comparable rate when the founder is absent for 1–2 weeks

The honest version of this question: what happens to deals in your pipeline when you're on holiday?

1	2	3	4
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Lead sources are documented and their contribution to closed revenue is tracked — you know which channels produce your best deals

Not just where leads come from, but which sources produce deals that close fastest and at the best margins

1	2	3	4
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You run a formal weekly pipeline review that produces a reliable view of the quarter — not an informal conversation about what the team is working on

A pipeline review has a fixed format, consistent data inputs, and produces a forecast number at the end

1	2	3	4
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AREA 5 SCORE

— / 16

YOUR RESULTS

Your overall *score*

01 · CRM & Pipeline Health

— / 16

02 · Sales Process Documentation

— / 16

03 · Metrics & Revenue Visibility

— / 16

What your score *means*

65–80

STRONG FOUNDATION

Your revenue function is well-structured. Focus on the two or three lowest-scoring areas — these represent the marginal gains. A RevOps engagement at this stage is optimisation work, not repair work.

45–64

FUNCTIONAL BUT FRAGILE

You have a revenue function, but it's held together by the founder and/or tribal knowledge. Growth is possible but unpredictable. Any significant headcount addition or fundraise will expose the gaps. Targeted infrastructure build required — start with your two lowest-scoring areas.

25–44

SIGNIFICANT GAPS

The revenue function is founder-dependent and under-documented. Growth beyond current levels is constrained by the infrastructure. A structured 90-day build is the right next step — with a clear sequence, starting with CRM data quality and process documentation before anything else.

Under 25

BUILD BEFORE YOU SCALE

There is no functioning revenue infrastructure yet. That's fine — it means you're building on a clean slate rather than fixing bad habits. But hiring sales headcount before the infrastructure exists will produce expensive ramp failures. Build the process first.

Know the gaps. Want a plan to close them?

Bring this audit to a conversation. Every UNFYS engagement starts with Discovery Week — a structured diagnostic that maps the current state of your revenue function in detail and produces a prioritised sequence for what to build first. If you've completed this audit and you're ready to act on what you found, this is the next step.

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