

Series A Sales *Infrastructure* Checklist

What your revenue function needs to look like before and immediately after a Series A. Covering CRM, process, metrics, team, and the 90-day post-raise build plan.

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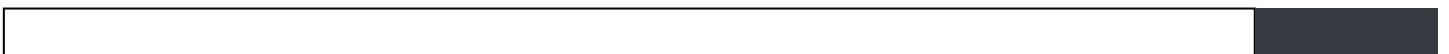
HOW TO USE THIS CHECKLIST

Work through each section and tick the items you can answer yes to. Anything you can't tick is a gap — either fix it before you raise, or have a clear plan for how you'll address it in the first 90 days post-close. Investors will probe for most of these.

Timings: If you're 6+ months from a raise, you have time to build properly. If you're 0–3 months out, focus on the items under CRM and Metrics first — these are what diligence surfaces fastest. The process and team items matter too, but CRM data quality and forecast accuracy are the most scrutinised.

Use the scoring row at the bottom of each section to track your readiness across areas.

PART 1 · PRE-RAISE BASELINE



Before Series A:

the baseline to reach

01 CRM & PIPELINE

___ / 6

- Every active deal is in the CRM with a deal owner, stage, value, and expected close date
- Pipeline stages have **documented exit criteria** — not vague labels like "Proposal" or "Negotiation"
- Stage progression is based on objective evidence, not rep optimism or inertia
- Deal records include discovery notes, key stakeholders, budget confirmed, and documented next steps
- CRM data is clean enough to produce a **credible 90-day forecast without manual adjustment**
- Historical stage-to-stage conversion rates are available and tracked (min. 12 months of data)

Priority: If you can't produce a credible 90-day forecast from the CRM alone, this is the first thing to fix. "We manage it in a spreadsheet" will end a diligence conversation.

02 SALES PROCESS

___ / 6

- Discovery process is documented and used consistently — not just in the founder's head
- Qualification criteria are explicit, written down, and applied at a defined pipeline stage
- Proposal process is documented: template, sign-off authority, and commercial parameters
- Objection handling is written down and shared with all customer-facing team members
- Win/loss analysis is being conducted quarterly and is informing process improvement
- Reps can advance deals to a defined pipeline stage without founder involvement**

The hard one: The last item is the one most founders can't tick. If the founder is still required to review or advance deals above a certain size, document that explicitly and have a mitigation plan ready.

03 METRICS & REPORTING

___ / 6

- Monthly recurring revenue (MRR) or ARR is tracked, calculated consistently, and verifiable from source data

- Win rate by source, deal size, and segment is available (not estimated)
- Average sales cycle length is calculated and benchmarked against internal targets
- Customer acquisition cost (CAC) is tracked or calculable within a week
- Pipeline coverage ratio is maintained at 3–4x target ARR in qualified pipeline going into any quarter
- Forecast accuracy is within 20% on a rolling 90-day basis (tracked, not estimated)

These aren't aspirational. They're the baseline that makes investor conversations productive. If you're guessing at any of these, build the reporting before you start fundraising — not during.

04 TEAM & LEADERSHIP

___ / 4

- Sales team has defined roles and written performance expectations — not informal arrangements
- Rep ramp time is understood, tracked, and improving (not stuck at 9–12 months)
- There is a defined senior commercial lead (Fractional CRO, VP Sales, or Head of Sales) who isn't the founder
- Founder-dependence risk is documented and has a credible mitigation plan attached to it

Be honest about this one. A founder who says "I'm still in a lot of deals but here's the plan to change that" is in a far better position than one who says it's fine when it clearly isn't. Investors will find out.

Your readiness *score*

Tally your score from each section and calculate your total out of 22:

CRM & Pipeline	___ / 6	Sales Process	___ / 6
Metrics & Reporting	___ / 6	Team & Leadership	___ / 4

TOTAL SCORE

___ / 22

20–22

RAISE-READY

Your revenue function will withstand diligence. Focus on presentation and narrative, not gaps.

15–19

NEARLY THERE

2–3 targeted improvements needed. Identify which items are missing and build them before starting conversations.

10–14

SIGNIFICANT GAPS

90 days of focused work required. Prioritise CRM accuracy and metrics reporting first — these are what investors actually look at.

Under 10

BUILD FIRST, RAISE SECOND

The infrastructure isn't ready. Start the build now — the sooner this is in place, the stronger your position when the raise comes.

PART 2 · POST-RAISE BUILD PLAN

After Series A: *the first 90 days*

The money is in the bank. The most common mistake post-raise is hiring before the process is ready to support the headcount. Use this 90-day plan to sequence the build correctly.

DAYS 1–30

Fix the foundation

- Audit the CRM: deal record completeness, stage accuracy, contact data quality
- Define ICP and qualification criteria formally in writing — new reps need a written standard
- Set up weekly pipeline review cadence before new reps join it
- Establish board reporting template for commercial metrics
- Identify which deals in the pipeline will convert vs. need to be marked as lost

DAYS 30–60

Hire in the right sequence

- SDRs before AEs if your model requires outbound — don't hire closers without a source of opportunities
- Build onboarding documentation before the first new hire starts: product knowledge, ICP, discovery guide, objection handling, CRM training, ramp milestones

→ Establish the management structure — 3+ reps requires a sales lead who isn't the founder

→ Define rep ramp plan with clear performance milestones at 30/60/90 days

DAYS 60–90

Review and adjust

→ Pipeline coverage vs. plan: is the pipeline sufficient to hit the targets in the investment plan?

→ Rep performance vs. ramp milestones: coaching gap, process gap, or hiring mistake?

→ Produce first board commercial report from live CRM data (no spreadsheet adjustments)

→ Assess whether top-of-funnel volume matches the growth trajectory you've committed to

WORK WITH UNFYS

Missing more than three items?

That's fixable — but it needs a clear plan and the right sequence. Every UNFYS engagement starts with Discovery Week: a structured diagnostic that maps exactly what's in place, what's missing, and what to build first. If you're heading towards a raise and want the revenue function to hold up under scrutiny, this is the conversation to have now.

GET IN TOUCH