

THE DILIGENCE FIX

Revenue System Handoff Audit: *Five questions at each transition point*

Use this before a QBR, a cross-functional meeting, or any time you want a quick read on where your revenue system is leaking.

MARKETING → SALES

- How quickly are qualified leads being followed up on — and is that consistent?
- Does the sales team know what marketing promised or implied in the prospect's journey?
- Where do sales and marketing disagree most often about lead quality?

IMPLEMENTATION → CUSTOMER SUCCESS

- Does customer success have the full account history, or just what's in the CRM?
- Are there recurring handoff failures on this transition that nobody has formally named?

SALES → IMPLEMENTATION / ONBOARDING

- What client intelligence gathered during the sales cycle is transferred at close — and how?
- Does the implementation team know the client's top three expectations before the first call?
- Is the selling rep involved in the transition, or does the client start over with a stranger?

CUSTOMER SUCCESS → RENEWAL / EXPANSION

- How early does sales get visibility into at-risk renewals?
- Are expansion conversations being missed because nobody owns the signal?

YOUR HONEST OVERALL RATING On a scale of 1–5, how well does information flow across your entire revenue arc right now? _____

What's the one handoff you'd fix first?

