



CONFIDENTIAL BUSINESS GROWTH AUDIT

SALES, MARKETING & LEAD GENERATION SYSTEMATIC PROCESS AUDIT

A practical assessment to identify growth gaps, process breakdowns, missed opportunities, and the highest-priority actions needed to build a more predictable revenue engine.

Build the system. Create consistency. Generate opportunity.

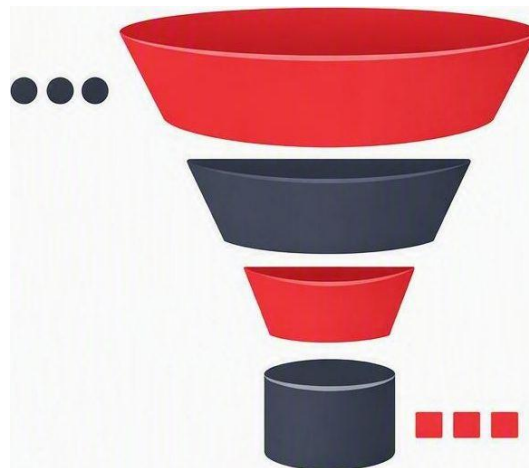
deltapointpartners.com



Audit Details

Complete the assessment honestly. The value is in identifying gaps, not achieving a perfect score.

Company Name	
Completed By / Title	
Date	
Email / Phone	



Audit Outcome: Rate each statement from 1 to 5 based on how consistently it is true today. At the end, total each section, identify your three biggest gaps, and convert them into a focused 90-day improvement plan.

Scoring Scale

Use the notes column to capture examples, evidence, concerns, ownership questions, or ideas for improvement.

SCORE	RATING	WHAT IT MEANS
1	Not in Place	No defined approach, ownership, or repeatable activity.
2	Inconsistent	Some activity occurs, but it depends on individuals and is not dependable.
3	Developing	A process exists, but adoption, measurement, or execution is incomplete.
4	Strong	The process is documented, consistently used, and produces measurable value.
5	Optimized	The process is integrated, measured, continuously improved, and scalable.

Total each section out of 60, then combine all five sections for a growth readiness score out of 300.



Business Growth Snapshot

Establish the context behind your current goals, market position, and revenue priorities.

Primary growth goal for the next 12 months	
Current annual revenue range	
Target annual revenue / growth percentage	
Top three products or services to grow	
Primary target markets / buyer types	
Average sale size / contract value	
Average sales cycle length	
Current monthly marketing and business development investment	

Sales Strategy & Execution

Evaluate whether your sales function has clear direction, structure, accountability, and repeatable execution.

AUDIT STATEMENT	SCORE 1-5	NOTES / EVIDENCE
1. We have clearly defined annual and quarterly revenue goals by market, offering, or salesperson.	_____	
2. Our ideal customer profiles and highest-value prospect segments are documented and understood.	_____	
3. Our value proposition clearly explains why a prospect should choose us over alternatives.	_____	
4. Our sales team uses a consistent qualification method to determine fit, urgency, authority, and budget.	_____	
5. We have a defined sales process with clear stages, exit criteria, and required next steps.	_____	
6. Every active opportunity has an owner, expected value, probability, and next action date.	_____	
7. Our sales team follows a consistent prospecting and follow-up rhythm each week.	_____	
8. Proposals, presentations, discovery questions, and sales messaging are standardized and current.	_____	
9. Leadership regularly coaches sales conversations, pipeline quality, and conversion performance.	_____	
10. We understand the primary reasons opportunities are won, lost, delayed, or abandoned.	_____	
11. Our sales forecast is based on reliable data rather than intuition or optimism.	_____	
12. We have strategies for account expansion, cross-selling, renewals, referrals, and reactivation.	_____	

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Sales Strategy & Execution — Findings

Summarize what is working, where the gaps are, and the single next action you will commit to.

SECTION 1 SCORE

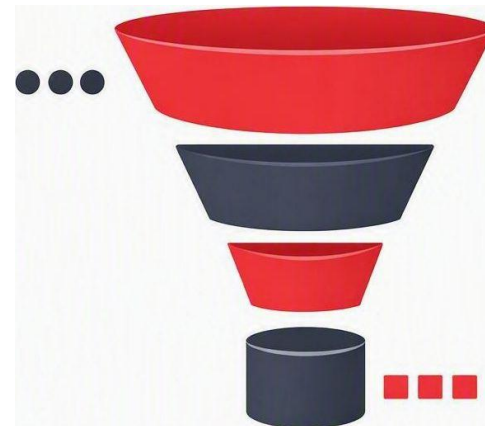
____ / 60

What is working well:

Primary gaps, risks, or inconsistencies:

Immediate improvement action:

Owner and target completion date:



Marketing Strategy & Market Visibility

Assess how effectively marketing supports credibility, differentiation, demand creation, and sales conversion.

AUDIT STATEMENT	SCORE 1-5	NOTES / EVIDENCE
1. Our marketing strategy is directly connected to revenue goals and priority markets.	_____	
2. Our brand positioning is clear, differentiated, and consistent across all channels.	_____	
3. Our website clearly communicates who we help, the problems we solve, and the next step to engage us.	_____	
4. Our website is designed to convert visitors into inquiries, downloads, meetings, or other trackable actions.	_____	
5. We consistently publish educational content that addresses the questions and challenges of target buyers.	_____	
6. Our email, social media, website, and sales outreach reinforce the same core messages.	_____	
7. We maintain a current content calendar with clear ownership, cadence, and target audience.	_____	
8. We use case studies, testimonials, proof points, and measurable outcomes to build trust.	_____	
9. We understand which marketing channels produce visibility, engagement, qualified leads, and revenue.	_____	
10. Our marketing database is segmented by market, persona, relationship, interest, and opportunity stage.	_____	
11. We have a process for nurturing prospects who are interested but not ready to buy.	_____	
12. Marketing performance is reviewed regularly and adjusted based on results.	_____	

2

Marketing Strategy & Market Visibility — Findings

Summarize what is working, where the gaps are, and the single next action you will commit to.

SECTION 2 SCORE

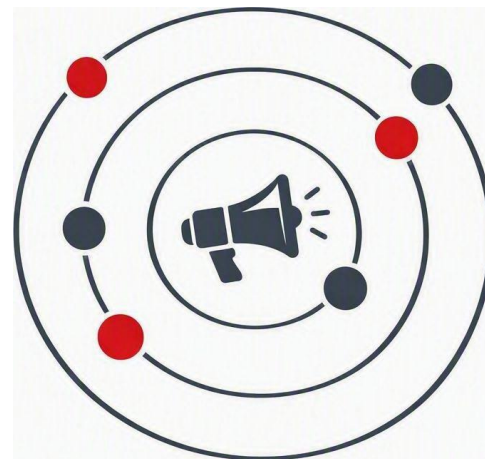
____ / 60

What is working well:

Primary gaps, risks, or inconsistencies:

Immediate improvement action:

Owner and target completion date:



Lead Generation & Opportunity Creation

Determine whether your organization can consistently identify, engage, qualify, and convert new prospects.

AUDIT STATEMENT	SCORE 1-5	NOTES / EVIDENCE
1. We have a documented lead generation plan with monthly activity and opportunity targets.	_____	
2. We use multiple lead sources rather than depending heavily on referrals or one channel.	_____	
3. Our prospect lists are accurate, segmented, current, and aligned with our ideal customer profile.	_____	
4. We know the key decision-makers, influencers, and buying roles for our target accounts.	_____	
5. Our outreach provides useful, relevant value rather than relying only on promotional messaging.	_____	
6. We use coordinated email, phone, LinkedIn, networking, partnerships, events, and content outreach where appropriate.	_____	
7. We have a defined response process for website visitors, email clickers, event attendees, and engaged prospects.	_____	
8. New inquiries and marketing-qualified leads receive timely, personalized follow-up.	_____	
9. We track lead source, cost, quality, conversion, and revenue contribution.	_____	
10. We have referral and strategic partnership programs that actively create introductions and opportunities.	_____	
11. We regularly reactivate older leads, dormant accounts, past prospects, and former clients.	_____	
12. Lead generation activity continues consistently even when the team is busy serving current customers.	_____	

3

Lead Generation & Opportunity Creation — Findings

Summarize what is working, where the gaps are, and the single next action you will commit to.

SECTION 3 SCORE

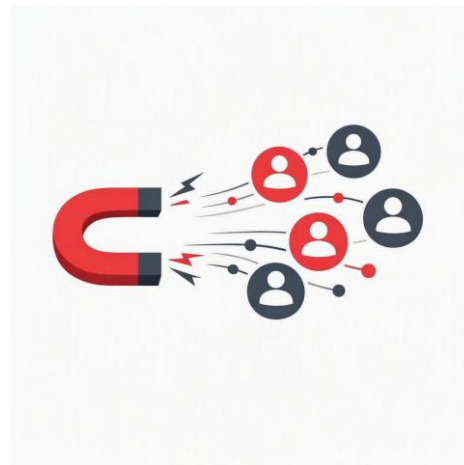
_____ / 60

What is working well:

Primary gaps, risks, or inconsistencies:

Immediate improvement action:

Owner and target completion date:



Systematic Process, CRM & Follow-Through

Evaluate the systems, workflows, technology, and accountability that turn activity into predictable results.

AUDIT STATEMENT	SCORE 1-5	NOTES / EVIDENCE
1. Our CRM is the central source of truth for prospects, contacts, activities, opportunities, and next steps.	_____	
2. Everyone uses the same definitions for lead stages, opportunity stages, statuses, and outcomes.	_____	
3. Required CRM fields and data-entry expectations are clearly defined and consistently followed.	_____	
4. Follow-up tasks, reminders, and next actions are created for every meaningful interaction.	_____	
5. Automated workflows support lead routing, nurturing, reminders, and stalled-opportunity follow-up.	_____	
6. We have service-level expectations for responding to leads, prospects, proposals, and client requests.	_____	
7. Our sales and marketing processes are documented so they do not depend on one person's memory.	_____	
8. Leadership can quickly see pipeline value, sales activity, conversion rates, aging, and bottlenecks.	_____	
9. We regularly clean duplicate, outdated, incomplete, or inaccurate contact and opportunity data.	_____	
10. We have a structured process for onboarding new sales, marketing, or business development team members.	_____	
11. Our systems connect marketing activity to sales opportunities and closed revenue.	_____	
12. We routinely review and improve workflows based on performance, feedback, and changing priorities.	_____	

Systematic Process, CRM & Follow-Through — Findings

Summarize what is working, where the gaps are, and the single next action you will commit to.

SECTION 4 SCORE

_____ / 60

What is working well:

Primary gaps, risks, or inconsistencies:

Immediate improvement action:

Owner and target completion date:



Alignment, Metrics & Leadership Accountability

Measure whether leadership, sales, and marketing are aligned around shared priorities and evidence-based decisions.

AUDIT STATEMENT	SCORE 1-5	NOTES / EVIDENCE
1. Leadership has established clear ownership for strategy, execution, reporting, and results.	_____	
2. Sales and marketing agree on target markets, lead definitions, qualification, and handoff expectations.	_____	
3. We have a small set of meaningful weekly and monthly growth metrics that drive action.	_____	
4. Activity metrics are balanced with quality, conversion, pipeline, revenue, and retention metrics.	_____	
5. Regular growth meetings result in decisions, owners, deadlines, and documented next steps.	_____	
6. We compare performance against goals and take corrective action quickly when results fall behind.	_____	
7. Compensation, incentives, and performance expectations support the behaviors we need.	_____	
8. Our team has adequate time, tools, talent, budget, and leadership support to execute the plan.	_____	
9. We identify process bottlenecks and root causes instead of simply asking people to work harder.	_____	
10. We know the cost of missed follow-up, slow response, poor data, inconsistent visibility, and weak conversion.	_____	
11. We have a realistic 90-day growth plan that prioritizes the highest-impact opportunities.	_____	
12. Our growth system can continue to function when the owner or a key employee is unavailable.	_____	

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Alignment, Metrics & Leadership Accountability — Findings

Summarize what is working, where the gaps are, and the single next action you will commit to.

SECTION 5 SCORE

_____ / 60

What is working well:

Primary gaps, risks, or inconsistencies:

Immediate improvement action:

Owner and target completion date:



Overall Scorecard & Growth Readiness

Translate your findings into priorities, ownership, and measurable next steps.

#	AUDIT AREA	SCORE	PRIORITY
1	Sales Strategy & Execution	_____ / 60	High / Med / Low
2	Marketing Strategy & Market Visibility	_____ / 60	High / Med / Low
3	Lead Generation & Opportunity Creation	_____ / 60	High / Med / Low
4	Systematic Process, CRM & Follow-Through	_____ / 60	High / Med / Low
5	Alignment, Metrics & Leadership Accountability	_____ / 60	High / Med / Low
TOTAL GROWTH READINESS SCORE		_____ / 300	_____ %

Top three growth gaps:

Most important process to standardize first:

Growth Readiness Interpretation

Use your total percentage to understand where your revenue engine stands today.

80-100%	Strong foundation. Focus on optimization, scaling, and removing isolated bottlenecks.
60-79%	Developing system. Several processes are working, but inconsistency may be limiting predictable growth.
40-59%	Significant gaps. Revenue may depend heavily on individuals, referrals, or reactive activity.
Below 40%	High risk. Immediate structure, ownership, process, and measurement are needed to create consistency.



Biggest immediate opportunity:

90-Day Improvement Plan

Prioritize a manageable number of actions that will create momentum and measurable improvement.

#	PRIORITY ACTION	OWNER	DUE DATE	SUCCESS METRIC	STATUS
1					
2					
3					
4					
5					

Recommended 90-Day Focus

First 30 Days

Clarify target markets, goals, ownership, sales stages, messaging, and baseline metrics.

Days 31-60

Implement priority workflows, CRM expectations, outreach cadence, content, and lead follow-up standards.

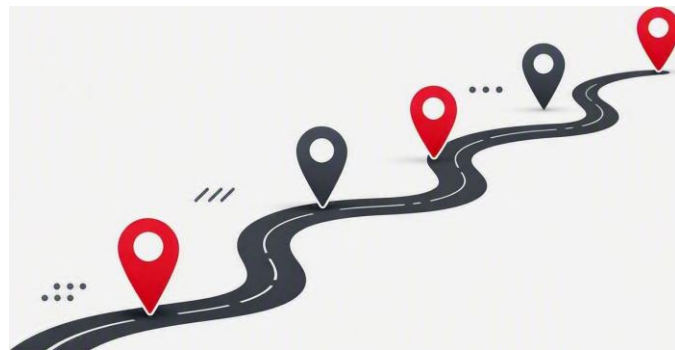
Days 61-90

Measure adoption and conversion, coach the team, correct bottlenecks, and build the next-quarter plan.



TURN YOUR AUDIT INTO A PRACTICAL GROWTH ROADMAP

DeltaPoint Partners helps organizations identify the gaps, build the systems, and create the consistent sales, marketing, and lead generation activity needed for predictable revenue growth.



Schedule a Growth Strategy Conversation
deltapointpartners.com

This assessment is intended as a business planning tool. Results should be reviewed in the context of your organization, market, resources, and objectives.