

SET THE SCOPE

TRACE THE WORK

CHECK THE SYSTEM

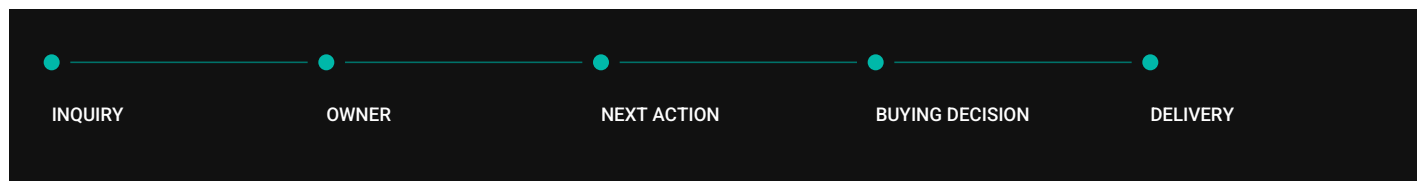
NAME THE GAPS

CHOOSE A NEXT STEP

A PRACTICAL REVIEW OF THE SALES SYSTEM AROUND YOUR CRM

Can your CRM show what happens next?

Trace recent inquiries, spot where work gets stuck, and choose what to investigate first. Built for owners and small teams who already have a CRM but still rely on memory, inboxes and workarounds.



Business

CRM / tools in use

Reviewed by

Review date

Sales process or service being reviewed

WORK FROM RECORDS YOU CAN CHECK

Start with 10 consecutive recent inquiries, including those that never became deals. If you have fewer, use what is available and record the count. Use record IDs or short references, not customer contact details.

A small sample can reveal issues; it does not measure your whole business. Record unknowns honestly. Keep this worksheet with your business records. It is a starting point for investigation, not a completed implementation scope.

Type into the fields and save a copy, or print and complete by hand.

01 / FOLLOW THE INQUIRY

Trace what actually happened.

Use the same sample throughout. Owner means the person responsible, including you if you handle sales yourself. For closed records, note the outcome instead of inventing a next action.

Sample date range

Number reviewed (up to 10)

REF.	SOURCE	OWNER	STAGE / STATUS	NEXT ACTION + DUE DATE	GAP / UNKNOWN

WHAT COULD YOU NOT RECONSTRUCT?

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02 / TEST THE CONNECTIONS

Check the system behind the records.

Mark each check using the sample: S = supported, G = gap found, U = unknown, N/A = not applicable. Add a record reference or short example. Do not add up the marks into a score.

CHECK	MARK	EVIDENCE / RECORD REF.
Intake Can you find each inquiry in the CRM?		
Ownership Is responsibility clear at each step?		
Pipeline Does the stage match what the buyer has actually done?		
Useful data Is the information needed for the next action present and consistent?		
Follow-up Does each open opportunity have a next action and due date?		
Connected tools Does the reminder or connected tool deliver the expected next step?		
Handoff When work changes hands or moves into delivery, are the owner and needed details clear?		
Visibility Can your normal pipeline view show what needs attention without checking separate notes?		

Supported means you found evidence in this sample. A gap or unknown is a prompt to investigate the cause before choosing a fix.

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03 / NAME WHAT NEEDS ATTENTION

Keep the findings specific.

Capture up to three findings. Separate what you observed from what you suspect. For the consequence, explain what became harder, slower or easier to miss; avoid estimating revenue without evidence.

FINDING 01

Leave blank if no additional finding is supported.

What happened + record/example

Observed consequence or suspected risk

Person to investigate

FINDING 02

Leave blank if no additional finding is supported.

What happened + record/example

Observed consequence or suspected risk

Person to investigate

FINDING 03

Leave blank if no additional finding is supported.

What happened + record/example

Observed consequence or suspected risk

Person to investigate

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04 / TURN ONE FINDING INTO ACTION

Choose the first change to investigate.

Pick one finding you can support. Define the behavior you want, the information still needed, and who will check the result. Confirm the cause before changing records or automation.

Finding to address + desired behavior

First action to investigate the cause

Information, access or dependency needed

Person responsible

Review date

How will you check that it worked?

Get the diagnosis and a defined build plan.

The \$3,000 Sales System Diagnostic includes a CRM and sales-process audit, a proposed sales system, and an implementation scope in one document, plus a findings readout.

Two weeks once required access and interviews are ready. Implementation is priced separately.

[Book an intro call](#)

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