SAMPLE REPORT

SALES PROCESS & CRM LEAK AUDIT

SAMPLE REPORT

Prepared for

Prairie Peak Remodeling

Residential remodeling

SALES PROCESS SCORE

34/60

Significant revenue leakage likely

Core question: Where are viable opportunities being lost inside the sales process because ownership, follow-up, CRM discipline, or next actions are inconsistent?

Fictional sample. All company details, records, metrics, and examples are invented for demonstration purposes.

EXECUTIVE SUMMARY

Executive Summary

Prairie Peak Remodeling has a functioning lead-generation and sales process, but several important opportunities are being left to individual memory and discretion. The CRM is not the primary problem. The larger issue is that ownership, follow-up standards, next actions, and stale-opportunity review are not consistently enforced.

The highest-priority correction is simple: require every active lead to have one clear owner and one scheduled next action. That single operating rule would improve accountability, reduce forgotten estimates, and make stale opportunities easier to identify.

The business scored 34 out of 60, which falls into the significant revenue leakage likely range. Most of the identified gaps can be improved through clearer operating rules and a short weekly pipeline review.

Sales Process Scorecard

Lead Capture	**7/10**
Response & Assignment	**6/10**
Follow-Up Discipline	**4/10**
CRM / Pipeline Management	**6/10**
Ownership & Accountability	**6/10**
Lost-Lead Recovery	**5/10**

Current flow

New inquiry -> office acknowledgement -> owner/estimator handoff -> contact attempt -> appointment -> estimate -> won/lost

HIGHEST-PRIORITY LEAKS

REVENUE LEAK #1 - INCONSISTENT LEAD OWNERSHIP

IMMEDIATE

Finding

Not every active lead has one clearly visible owner in the CRM.

Evidence

Office staff forwards inquiries to the owner or one of two estimators, but assignment is not always explicitly recorded. Multiple people may be involved without one accountable owner.

Recommended correction

Require exactly one named owner from initial assignment until the opportunity is won, lost, or moved to reactivation. Keep ownership visible directly in the CRM.

REVENUE LEAK #2 - FOLLOW-UP ENDS TOO EARLY

IMMEDIATE

Finding

Follow-up after the first contact attempt is inconsistent and often stops after only one or two additional attempts.

Evidence

Most leads receive one phone attempt and one text/email attempt. Additional follow-up depends on the estimator; no documented minimum cadence exists.

Recommended correction

Create a simple minimum follow-up cadence defining number of attempts, channels, and when an opportunity can move to dormant status.

PIPELINE VISIBILITY & RECOVERY

REVENUE LEAK #3 - ESTIMATES LACK A REQUIRED NEXT ACTION

Finding

An estimate can remain active without a scheduled next action.

Correction

Require every active estimate to have a next-action date and one owner. Separate Estimate Delivered from Decision Pending.

REVENUE LEAK #4 - STALE OPPORTUNITIES ARE HARD TO SEE

Finding

The CRM does not make stale opportunities obvious; leads can remain in Contacted or Estimate Sent for extended periods.

Correction

Create views for opportunities with no activity and for overdue next actions; review them weekly.

REVENUE LEAK #5 - NO SYSTEMATIC DORMANT-LEAD REACTIVATION

Finding

Older prospects, postponed projects, and stale estimates are not reviewed through a repeatable reactivation process.

Correction

Create a Dormant / Reactivation stage and a simple monthly review, starting with older estimates and postponed projects.

RECOMMENDED OPERATING SYSTEM

Recommended Sales Process

1. Capture every inquiry in one system.
2. Assign one owner immediately.
3. Attempt first contact within the agreed response standard.
4. Record every contact attempt and outcome.
5. Follow the minimum no-response cadence.
6. When qualified, schedule consultation / estimate work.
7. After estimate delivery, assign a next-action date.
8. Close as Won, Lost with reason, or Postponed / Reactivation.

Recommended Pipeline

- New Lead
- Contact Attempted
- Contact Made / Qualified
- Consultation Scheduled
- Estimate in Progress
- Estimate Delivered
- Decision Pending
- Won / Lost / Reactivation

Minimum Follow-Up Framework

- Attempt 1: call + text/email acknowledgement
- Attempt 2: within one business day
- Attempt 3: alternate channel
- Attempt 4: final short follow-up, then dormant
- Every delivered estimate gets a scheduled next action
- Postponed projects move to Reactivation with review date

Operating rule: One owner + one next action for every active opportunity.

30-DAY ACTION PLAN

30-Day Priority Action Plan

DAYS 1-7

- Require one owner for every active lead.
- Define a minimum follow-up cadence for unresponsive new leads.
- Require a next-action date for every active estimate.
- Make “one owner + one next action” the operating rule.

DAYS 8-14

- Separate Estimate Delivered from Decision Pending.
- Create stale-opportunity views for no activity and overdue next actions.
- Standardize a short list of lost reasons.

DAYS 15-30

- Run a 15-20 minute weekly stale/overdue review.
- Segment older postponed projects and estimates into Reactivation.
- Run the first small reactivation batch and record outcomes.

QUICK WINS

1. One owner per active lead.
2. One scheduled next action per opportunity.
3. One weekly stale-pipeline review.

WHAT NOT TO CHANGE YET

- Do not replace the CRM.
- Do not buy complex automation yet.
- Do not add unnecessary pipeline stages.
- Do not start with a large database cleanup.

Final recommendation

Start by enforcing one visible owner and one scheduled next action for every active lead and estimate. Then add a short weekly stale-opportunity review and a documented minimum follow-up cadence.