

The Five-Question Revenue Check — Worksheet

Five numbers most companies never look at. Find each one with your own team. You don't need to share them with anyone. What matters is whether you like what you find. If nobody can find a number, write that down: it's a finding of its own.

1 Pipeline

Would you bet your own money on this quarter's pipeline number?

GO FIND

Pull 10 open deals at random, with no clean-up first. For each one, check three things with the rep: is the amount right, is the close date real, and is the stage where the buyer actually is?

GOOD LOOKS LIKE

8 or more of the 10 are right on all three. Fewer than 6 means the forecast is built on guesses. (Starting point from experience)

WHAT I FOUND

DO I LIKE IT?

☐ Yes ☐ No ☐ Couldn't find it

2 CRM coverage

Does your CRM follow the whole customer life, from first lead through renewal or reorder, not just new deals?

GO FIND

Pick three customers who signed more than a year ago. In the CRM, can you see where each one came from, the deal, what has happened since the sale, and their next renewal or reorder date with an owner?

GOOD LOOKS LIKE

All three, start to finish, each with a next renewal or reorder date and an owner. (Starting point from experience)

WHAT I FOUND

DO I LIKE IT?

☐ Yes ☐ No ☐ Couldn't find it

3 Existing customers

Does anyone track which existing customers are likely to buy more, buy again, or leave?

GO FIND

Ask who tracks this, and to see the list. Then look at last year: of the customers who bought more, and the ones who left or cut back, how many were on that list beforehand?

GOOD LOOKS LIKE

A current list with an owner that covers both sides, growth and risk, and most of last year's changes, roughly 3 in 4, were on it first. (Starting point from experience)

WHAT I FOUND

DO I LIKE IT?

☐ Yes ☐ No ☐ Couldn't find it

4 Lead follow-up

Do you know whether every new lead gets a quick follow-up, not just most of them?

GO FIND

Take your last 20 inbound leads. For each one, note when it came in, when a person first reached out, and whether anyone tried again if there was no answer. Look at the slowest five and any that got no reply at all, not the average.

GOOD LOOKS LIKE

All 20 reached by a person, most within an hour, none waiting more than one business day. Companies that responded within an hour were about seven times as likely to qualify the lead as those that waited longer (Harvard Business Review, 2011). (One business day is a starting point from experience)

WHAT I FOUND

DO I LIKE IT?

☐ Yes ☐ No ☐ Couldn't find it

5 Selling time

Do you know how many hours a week your salespeople spend selling, compared with meetings and admin?

GO FIND

Take one typical rep's calendar for last week. Count the hours spent selling: calls, meetings and demos with prospects, and follow-up on a specific deal. Divide by the hours they worked.

GOOD LOOKS LIKE

Better than the industry average of 28–30% of the week (Salesforce, State of Sales, 2024). Above 40% is a well-protected team. (40% is a starting point from experience)

WHAT I FOUND

DO I LIKE IT?

☐ Yes ☐ No ☐ Couldn't find it

When you have your numbers: book a free 20-minute call at jeffrandall.co/find.html, or email hello@jeffrandall.co. I'll tell you plainly whether it's worth acting on, including when it isn't.

"Starting point from experience" means a working figure, not published research; your own last year is often the better comparison. jeffrandall.co