



IS YOUR CRM WORKING FOR YOU—OR ARE YOU WORKING AROUND IT?

A QUICK REVENUE SYSTEM GAP FINDER

Most companies don't have a CRM problem. They have a revenue system problem.

Use this 5-minute checklist to identify gaps, workarounds, and manual processes that may be costing your team time, money, and growth.



WHY THIS MATTERS

When sales and marketing aren't aligned and systems aren't connected, your team creates workarounds. Those workarounds become the real system—and that's where revenue leaks out.

HOW TO USE THIS GUIDE

- 1 Check all the warning signs that apply to your team.
- 2 Rate how often your team performs manual workarounds.
- 3 Calculate the time your team is losing each week.

Use your results on page 2 to identify your biggest gaps and the next best steps.

PART 1: WARNING SIGNS (Check all that apply)

SALES TEAM

- Salespeople maintain spreadsheets outside the CRM
- Opportunities are not updated consistently
- Forecasts require manual adjustments
- Customer information is stored in emails or notebooks
- Management questions the accuracy of CRM reports
- Salespeople complain the CRM takes too much time

MARKETING TEAM

- Leads are generated but rarely followed up
- Marketing cannot prove campaign ROI
- Email campaigns are largely manual
- Lead nurturing is inconsistent
- Marketing and sales disagree on lead quality
- Reporting requires exporting data to Excel

TECHNOLOGY

- Systems do not integrate properly
- Data exists in multiple locations
- Team members enter the same information multiple times
- Reports require manual compilation
- Customer information is difficult to find
- Important activities happen outside company systems



www.AcadiaLMS.com

mem@acadialms.com

937 654 3084



PART 2: THE REVENUE LEAKAGE TEST How often does this happen?

ACTIVITY	NEVER	SOMETIMES	FREQUENTLY
Export CRM data to Excel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Re-enter information in multiple systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Build manual reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for information that should already exist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ask coworkers for customer updates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track activities outside the CRM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



WHAT THIS MEANS

- The more "Frequently" boxes you check, the more your team is relying on manual workarounds.
- Workarounds create delays, errors, and missed opportunities.

PART 4: WHERE DO YOU STAND?

0-3 WARNING SIGNS CHECKED	Your revenue system is relatively healthy.
4-8 WARNING SIGNS CHECKED	Operational friction is slowing growth.
9-15 WARNING SIGNS CHECKED	Your team is relying on workarounds instead of systems.
16+ WARNING SIGNS CHECKED	Your CRM isn't the problem. Your revenue system needs attention.

PART 3: THE REAL COST CALCULATOR Estimate hours lost per week on each activity.

Manual Reporting	_____
Spreadsheet Maintenance	_____
Data Cleanup	_____
Searching for Information	_____
Duplicating Data Entry	_____
Missed Follow-Up Activities	_____

TOTAL HOURS LOST PER WEEK _____

TOTAL HOURS LOST PER YEAR _____
(Multiply weekly total by 50)



THE ACADIA INSIGHT

The spreadsheets, sticky notes, manual reports, and side systems are symptoms—not the cause. The real challenge is building a revenue system where people, process, and technology work together.

When that happens, your team spends less time managing systems—and more time growing revenue.



READY TO STOP THE REVENUE LEAKS?

Let's identify where revenue is leaking from your sales and marketing process.

Schedule a complimentary 45-minute Revenue System Review.



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