

Sales and Marketing Shouldn't Compete.

They Should Work as **One** Revenue System.



SALES



ONE REVENUE SYSTEM



MARKETING

Revenue System Friction Check

Revenue problems rarely begin where they become visible. Check each statement that is true in your organization today. The goal is not to diagnose the system, but to reveal where a closer look may be warranted.

- 1 ☐ RFQ, estimate, customer, or opportunity information is manually entered in more than one system.
- 2 ☐ Leads or opportunities sometimes stall because the next owner or required action is unclear.
- 3 ☐ Sales, marketing, technical, or estimating teams use different definitions for a qualified opportunity.
- 4 ☐ Important customer information lives in spreadsheets, inboxes, personal notes, or employees' memory.
- 5 ☐ CRM stages do not consistently reflect what is actually happening in the sales process.
- 6 ☐ Pipeline or forecast reports require manual cleanup, explanation, or spreadsheet reconciliation.
- 7 ☐ Leaders spend meeting time validating the numbers before they can make decisions from them.
- 8 ☐ Teams have created workarounds because the documented process or technology does not fit the work.
- 9 ☐ Follow-up expectations differ by salesperson, territory, channel, or lead source.
- 10 ☐ A staffing, leadership, product, or territory change would disrupt how opportunities are tracked and advanced.

WHAT YOUR RESPONSES MAY INDICATE

0-2 CHECKED

Monitor

Few visible warning signs. Continue watching for recurring exceptions or manual work.

3-5 CHECKED

Review

Friction may be affecting handoffs, data quality, or leadership visibility.

6+ CHECKED

Investigate

Multiple symptoms may share an underlying workflow or ownership constraint.

WHERE IS FRICTION MOST VISIBLE TODAY?

- ☐ Workflow ☐ Handoffs ☐ CRM/data ☐ Reporting ☐ Ownership ☐ Not sure yet

The next step is to find the constraint - not treat another symptom.

Schedule a Revenue Systems Diagnostic Conversation to discuss where friction is showing up and whether the visible problem points to a deeper system issue.

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