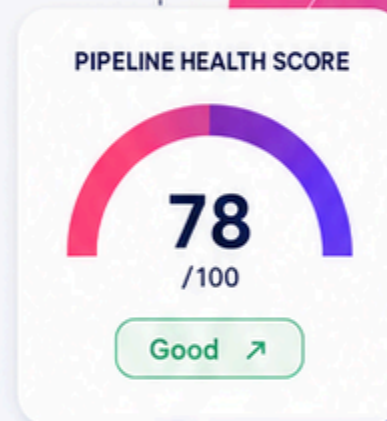


Ultimate B2B Sales Pipeline Audit Checklist

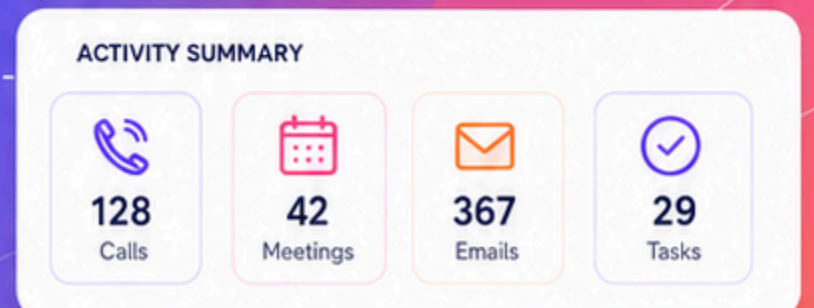
Step-by-step diagnostic checklist used by RevOps leaders to evaluate pipeline health, identify bottlenecks, improve forecast accuracy, and eliminate revenue leakage.

-  Evaluate Pipeline Health
-  Audit CRM & Data Quality
-  Improve Forecast Accuracy
-  Identify Bottlenecks
-  Eliminate Revenue Leakage



TOP OPPORTUNITIES

Opportunity	Stage	Amount	Close Date
Acme Corp	Proposal	\$125,000	May 15, 2025
Globex Inc.	Negotiation	\$98,000	May 28, 2025
Initech	Qualification	\$75,000	Jun 10, 2025
Stark Industries	Proposal	\$62,000	Jun 18, 2025



PDF Workbook



Executive Edition



18 Pages

Prepared by

LeadPilot

How to Use This Checklist

This checklist is designed to help RevOps leaders perform a comprehensive audit of their sales pipeline and operations. Follow these simple steps to evaluate, score, and improve.



01



Complete one section at a time

Work through each section carefully and answer every checklist item honestly.

02



Score every category

Give yourself a score out of 10 for each section based on your current performance.

03



Total your score

Add up your scores to get your overall Pipeline Health Score out of 100.

04



Identify improvement areas

Review your lowest scoring sections to find the biggest opportunities.

05



Build your action plan

Create a practical action plan to close gaps, eliminate bottlenecks, and drive revenue.

PIPELINE HEALTH SCORE


 Good

A score of 75 or above indicates a strong pipeline foundation with opportunities to optimize.



Pro Tip

Be honest in your assessment. This checklist is a diagnostic tool, not a test. The more accurate your audit, the better your results will be.



Goal: Build a cleaner, faster, and more predictable revenue engine with a healthy pipeline.



Pipeline Health Scorecard

Score each area on a scale of 0–10 based on your current performance. Add up your total score out of 100.



Area	What It Measures	Your Score (0–10)
 Pipeline Coverage	The volume and quality of opportunities in your pipeline.	___/10
 CRM Hygiene	The accuracy, completeness, and cleanliness of your CRM data.	___/10
 Deal Qualification	The depth and quality of qualification using MEDDPICC.	___/10
 Forecast Accuracy	The reliability and precision of your revenue forecasts.	___/10
 Pipeline Velocity	How quickly opportunities move through your pipeline.	___/10
 Sales Activity	The effectiveness and consistency of your team's activities.	___/10
 Automation	The adoption and impact of AI and automation in your sales process.	___/10
 Reporting	The quality and visibility of your reports and dashboards.	___/10
 Coaching	The effectiveness of sales management and coaching.	___/10
 Revenue Operations	The alignment, processes, and systems that drive predictable revenue.	___/10

Overall Pipeline Health Score



90–100

World-Class Revenue Engine

75–89

Strong Pipeline

60–74

Needs Optimization

Below 60

Immediate RevOps Attention Required

Deal Qualification Checklist

Well-qualified deals are more likely to close.
Use MEDDPICC to evaluate the quality and completeness of your opportunities.

MEET

ECONOMIC BUYER

DECISION CRITERIA

DECISION PROCESS

IDENTIFY PAIN

CHAMPION

COMPETITION

OPPORTUNITY SNAPSHOT

Acme Corp

Proposal

Owner

Close Date

Stage

Amount

YOUR SCORE

___/100

To be calculated

MEDDPICC Element	Checklist Item	Yes	No	N/A	Notes
M – Metrics Quantify the opportunity	Have you identified measurable business impact?	☐	☐	☐	
E – Economic Buyer Engage the right person	Have you identified and engaged the economic buyer?	☐	☐	☐	
D – Decision Criteria Understand what matters	Do you understand the decision criteria for this opportunity?	☐	☐	☐	
D – Decision Process Map the buying process	Do you understand the decision process and key stakeholders?	☐	☐	☐	
P – Identify Pain Uncover business pain	Have you uncovered and validated their key business pain?	☐	☐	☐	
I – Champion Build internal advocacy	Do you have an internal champion advocating for you?	☐	☐	☐	
C – Competition Identify and differentiate	Do you know who your competitors are and how you differentiate?	☐	☐	☐	
C – Close Plan Create a clear plan to win	Do you have a clear plan to close this deal?	☐	☐	☐	

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall qualification score.

SCORING GUIDE

90 – 100

Excellent

Well-qualified opportunities with low risk.

75 – 89

Strong

Solid opportunities with minor qualification gaps.

50 – 74

Needs Work

Moderate risk; strengthen key areas.

Below 50

At Risk

High risk of poor conversion and forecast inaccuracy.

Pro Tip

Review your opportunities regularly and update your qualification to improve conversion and forecasting.

Right People

Right Process

Better Forecasts

More Revenue

Forecast Accuracy Checklist

Accurate forecasts drive better decisions, resource planning, and investor confidence. Use this checklist to evaluate the reliability of your forecasts.

Forecast Overview

Forecast (Period)

Committed (Period)

Best Case (Period)

YOUR SCORE

___/100

To be calculated

Checklist Item	What to Evaluate	Yes	No	N/A	Notes
Forecast Methodology	Is your forecasting methodology documented and consistently used?	☐	☐	☐	.....
Data Quality	Are forecasts based on clean, complete, and real-time data?	☐	☐	☐	.....
Stage Probability	Are win probabilities assigned appropriately by stage?	☐	☐	☐	.....
Deal Coverage	Are all active deals included in the forecast?	☐	☐	☐	.....
Time Horizon	Does the forecast cover the right time periods (month, quarter, year)?	☐	☐	☐	.....
Adjustments	Are adjustments and overrides documented with clear reasons?	☐	☐	☐	.....
Historical Accuracy	How accurate were past forecasts vs. actual results?	☐	☐	☐	.....
Review Cadence	Is the forecast reviewed and updated regularly by the team?	☐	☐	☐	.....
Stakeholder Alignment	Are stakeholders aligned and confident in the forecast?	☐	☐	☐	.....
Variance Analysis	Do you analyze forecast vs. actual variance regularly?	☐	☐	☐	.....

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall forecast accuracy score.

SCORING GUIDE

90 – 100

Excellent

– Highly accurate and trusted forecasts.

75 – 89

Good

– Minor gaps. Keep improving consistency.

50 – 74

Needs Work

– Moderate inaccuracy. Address key gaps.

Below 50

At Risk

– Low accuracy. High risk to revenue outcomes.

Pro Tip

Use historical accuracy, variance analysis, and data quality to continuously improve forecast reliability.

Improve Accuracy

Boost Confidence

Better Decisions

Drive Revenue

Conversion Optimization Checklist

Improve conversion rates by identifying friction points, strengthening your value proposition, and optimizing the buyer journey. Use this checklist to evaluate and enhance your conversion performance.



Checklist Item	What to Evaluate	Yes	No	N/A	Notes
 Value Proposition	Is your value proposition clear, compelling, and differentiated?	☐	☐	☐	
 Buyer Journey	Is the buyer journey mapped and optimized at each stage?	☐	☐	☐	
 Content Effectiveness	Does your content address buyer pain points and objections?	☐	☐	☐	
 Landing Pages	Are landing pages optimized for clarity, trust, and action?	☐	☐	☐	
 Forms & CTAs	Are forms simple and CTAs clear, relevant, and visible?	☐	☐	☐	
 Response Time	Is initial response time fast and consistent?	☐	☐	☐	
 Objection Handling	Are sales objections identified and effectively addressed?	☐	☐	☐	
 Follow-up Process	Do you have a structured and consistent follow-up process?	☐	☐	☐	
 A/B Testing	Are you continuously testing and improving key conversion elements?	☐	☐	☐	
 Conversion Metrics	Are conversion metrics tracked, reviewed, and acted upon?	☐	☐	☐	

YOUR SCORE



Add up the points based on your responses and compare with the scoring guide to determine your overall conversion optimization score.

SCORING GUIDE

90 – 100	Excellent	– Optimized conversion process with best-in-class performance.
75 – 89	Good	– Strong conversion process with minor improvement areas.
50 – 74	Needs Work	– Moderate conversion rate with several opportunities.
Below 50	At Risk	– Low conversion efficiency. Immediate optimization required.



Pro Tip
Small improvements at each stage of the buyer journey can lead to significant conversion gains.



Strengthen Value Proposition



Reduce Friction Points



Test & Optimize Continuously



Increase Deal Wins

Sales Process Effectiveness Checklist

A strong sales process ensures consistency, predictability, and scalability. Use this checklist to evaluate the effectiveness of your sales process and identify areas for improvement.

Sales Process Overview

Active Deals

Avg. Sales Cycle (Days)

Win Rate (%)

Pipeline Value (AED)

Deals Won (This Month)

Revenue Won (AED)

Process Health Score

___/100

To be calculated

Process Stages

1
Prospecting

2
Qualify

3
Propose

4
Negotiate

5
Close

Checklist Item	What to Evaluate	Yes	No	N/A	Notes
Process Definition	Is your sales process clearly defined and documented?	☐	☐	☐	.....
Stage Exit Criteria	Are clear exit criteria defined for each stage?	☐	☐	☐	.....
Activities & Tasks	Are key activities and tasks defined for each stage?	☐	☐	☐	.....
Sales Playbooks	Do you have playbooks, templates, and best practices for your team?	☐	☐	☐	.....
Roles & Responsibilities	Are roles and responsibilities well-defined across the sales team?	☐	☐	☐	.....
Lead Qualification	Do you have a consistent lead qualification method?	☐	☐	☐	.....
Proposal Quality	Are proposals tailored, value-driven, and compelling?	☐	☐	☐	.....
Objection Management	Are objections identified early and handled effectively?	☐	☐	☐	.....
Forecasting Discipline	Is forecasting done consistently and accurately?	☐	☐	☐	.....
Continuous Improvement	Do you review and improve your sales process regularly?	☐	☐	☐	.....

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall sales process effectiveness score.

SCORING GUIDE

90 – 100

Excellent

–

Highly effective, documented, and consistently followed process.

75 – 89

Good

–

Effective process with minor gaps to address.

50 – 74

Needs Work

–

Moderate effectiveness; several areas need improvement.

Below 50

At Risk

–

Ineffective and inconsistent process; significant improvements needed.

Pro Tip
Document, train, follow, and refine your sales process. A repeatable process creates predictable results.

Document Your Process

Train Your Team

Follow Consistently

Measure & Improve

Drive Predictable Growth

LeadPilot

Audit. Optimize. Accelerate Revenue.

Customer Experience Excellence Checklist

Exceptional customer experiences build loyalty, drive referrals, and accelerate growth. Use this checklist to evaluate the quality and consistency of your customer experience across all touchpoints.

Customer Experience Overview

Customer Satisfaction

To be calculated

Net Promoter Score (NPS)

To be calculated

Avg. Response Time

To be calculated

First Contact Resolution

To be calculated

Customer Retention Rate

To be calculated

Customer Lifetime Value

To be calculated

YOUR SCORE

___/100
To be calculated

Checklist Item	What to Evaluate	Yes	No	N/A	Notes
Customer Understanding	Do you deeply understand your customers' needs, challenges, and expectations?	☐	☐	☐	.....
Communication	Is your communication clear, timely, and relevant across all channels?	☐	☐	☐	.....
Response Time	Do you respond to inquiries promptly and acknowledge customer requests?	☐	☐	☐	.....
Service Quality	Do you consistently deliver high-quality service and solutions?	☐	☐	☐	.....
Customer Journey	Is the customer journey smooth, intuitive, and hassle-free?	☐	☐	☐	.....
Personalization	Do you personalize interactions based on customer data and preferences?	☐	☐	☐	.....
Issue Resolution	Do you resolve customer issues effectively and follow up?	☐	☐	☐	.....
Feedback & Listening	Do you actively seek customer feedback and act on it?	☐	☐	☐	.....
Loyalty & Advocacy	Do you create experiences that encourage repeat business and referrals?	☐	☐	☐	.....
Experience Measurement	Do you measure and track customer experience metrics regularly?	☐	☐	☐	.....

YOUR SCORE

___/100
To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall customer experience excellence score.

SCORING GUIDE

90 – 100

Excellent

–

Exceptional experience that drives loyalty and advocacy.

75 – 89

Good

–

Strong experience with minor gaps to improve.

50 – 74

Needs Work

–

Inconsistent experience; several areas need attention.

Below 50

At Risk

–

Poor experience; immediate improvements required.

Pro Tip
Small improvements in customer experience can lead to significant increases in retention and referrals.

Listen Actively

Respond Quickly

Solve Completely

Personalize Interactions

Delight Consistently

Performance Measurement Effectiveness Checklist

Effective measurement drives accountability, informs decisions, and accelerates growth. Use this checklist to evaluate how well you measure and leverage performance across your sales and marketing activities.













Performance Overview



Total Leads

To be calculated



Conversion Rate (%)

To be calculated



Revenue (AED)

To be calculated



Avg. Deal Size (AED)

To be calculated



Sales Cycle Length (Days)

To be calculated



Win Rate (%)

To be calculated

YOUR SCORE



___/100

To be calculated



Checklist Item	What to Evaluate	Yes	No	N/A	Notes
 Goal Alignment	Are KPIs aligned with business goals and priorities?	☐	☐	☐	-----
 KPI Relevance	Do KPIs measure activities that drive desired outcomes?	☐	☐	☐	-----
 Data Accuracy	Is the data accurate, reliable, and updated regularly?	☐	☐	☐	-----
 Timeliness	Is performance data available in a timely manner?	☐	☐	☐	-----
 Dashboard & Reporting	Are dashboards and reports clear, actionable, and easy to understand?	☐	☐	☐	-----
 Insight Generation	Do you derive insights that lead to better decisions?	☐	☐	☐	-----
 Accountability	Are owners assigned for each KPI with clear accountability?	☐	☐	☐	-----
 Action & Follow-up	Do you take action based on performance insights?	☐	☐	☐	-----
 Trend Analysis	Do you analyze trends over time to identify opportunities and risks?	☐	☐	☐	-----
 Continuous Improvement	Do you review and refine your KPIs and metrics regularly?	☐	☐	☐	-----

YOUR SCORE



Add up the points based on your responses and compare with the scoring guide to determine your overall performance measurement effectiveness score.

SCORING GUIDE

90 – 100

Excellent

–

Highly effective measurement driving strong results.

75 – 89

Good

–

Effective measurement with minor gaps to improve.

50 – 74

Needs Work

–

Moderate effectiveness; several areas need attention.

Below 50

At Risk

–

Weak measurement; immediate improvements required.



Pro Tip

Focus on the right metrics, review them regularly, and use insights to drive continuous improvement.



Track What Matters



Review Regularly



Act on Insights



Align with Goals



Improve Continuously

LeadPilot

Audit. Optimize. Accelerate Revenue.

Financial Impact Assessment Checklist

Understand the true financial impact of your sales and marketing efforts. Use this checklist to evaluate ROI, profitability, and the efficiency of your revenue engine.

\$

Bar Chart

Calculator

Pie Chart

Target

Financial Impact Overview

Total Revenue (AED)
To be calculated

Total Costs (AED)
To be calculated

Net Profit (AED)
To be calculated

ROI (%)
To be calculated

Customer Acquisition Cost (CAC) (AED)
To be calculated

Customer Lifetime Value (CLV) (AED)
To be calculated

YOUR SCORE

___/100

To be calculated

Checklist Item	What to Evaluate	Yes	No	N/A	Notes
Revenue Attribution	Can you clearly attribute revenue to campaigns, channels, and activities?	☐	☐	☐	_____
Cost Tracking	Are all sales and marketing costs tracked accurately?	☐	☐	☐	_____
ROI Calculation	Do you calculate ROI for campaigns, channels, and initiatives?	☐	☐	☐	_____
Customer Acquisition Cost	Do you know your current CAC and monitor it regularly?	☐	☐	☐	_____
Customer Lifetime Value	Do you calculate and track CLV of your customers?	☐	☐	☐	_____
CLV to CAC Ratio	Is your CLV to CAC ratio healthy (typically 3:1 or higher)?	☐	☐	☐	_____
Profitability Analysis	Do you analyze profitability by product, segment, or channel?	☐	☐	☐	_____
Discount Impact	Do you measure the impact of discounts on profitability?	☐	☐	☐	_____
Payback Period	Do you know the payback period of your sales and marketing investments?	☐	☐	☐	_____
Financial Reporting	Are financial impact reports reviewed regularly with stakeholders?	☐	☐	☐	_____

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall financial impact assessment score.

SCORING GUIDE

90 – 100

Excellent

– Strong financial impact with high ROI and profitability.

75 – 89

Good

– Good financial performance with minor improvement areas.

50 – 74

Needs Work

– Moderate financial impact; several areas need attention.

Below 50

At Risk

– Weak financial impact; immediate improvements required.

Pro Tip
Regularly measure and optimize your financial performance to maximize profitability and sustainable growth.

Track All Costs Accurately

Focus on High ROI Activities

Improve CLV to CAC Ratio

Review & Optimize Continuously

Align with Business Goals



Sales & Marketing Alignment Checklist

Alignment between sales and marketing teams drives better lead quality, shorter sales cycles, and predictable growth. Use this checklist to evaluate and strengthen your Smarketing alignment.



Alignment Overview

Shared Goals
____/100
To be calculated

Lead Quality
____/100
To be calculated

Communication
____/100
To be calculated

Process Alignment
____/100
To be calculated

Content Alignment
____/100
To be calculated

Performance Transparency
____/100
To be calculated

Alignment Maturity

1

Siloed

2

Aware

3

Aligned

4

Integrated

5

Optimized

YOUR SCORE

____/100

To be calculated



Checklist Item	What to Evaluate	Yes	No	N/A	Notes
 Shared Goals & KPIs	Do sales and marketing share common goals and KPIs?	☐	☐	☐	.....
 Lead Definition	Is there a clear, agreed-upon definition of a qualified lead (MQL/SQL)?	☐	☐	☐	.....
 Communication Cadence	Do sales and marketing have regular communication and feedback loops?	☐	☐	☐	.....
 Process Alignment	Are lead handoff and follow-up processes well-defined and followed?	☐	☐	☐	.....
 Content Alignment	Is content created based on buyer journey and sales needs?	☐	☐	☐	.....
 Campaign Collaboration	Do both teams collaborate on campaign planning and execution?	☐	☐	☐	.....
 Lead Quality	Is the quality of leads generated meeting sales expectations?	☐	☐	☐	.....
 Feedback Loop	Does sales provide feedback on lead quality and content effectiveness?	☐	☐	☐	.....
 Performance Transparency	Are performance metrics and results visible and shared across teams?	☐	☐	☐	.....
 Continuous Improvement	Do both teams review performance and improve processes together?	☐	☐	☐	.....

YOUR SCORE

____/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall sales & marketing alignment score.

SCORING GUIDE

90 – 100

Excellent

75 – 89

Good

50 – 74

Needs Work

Below 50

At Risk

– Fully aligned and operating as one revenue team.

– Well aligned with minor gaps to address.

– Moderate alignment; several areas need improvement.

– Poor alignment; immediate action required.

Pro Tip

Alignment isn't a one-time project. Keep communicating, sharing wins, and refining processes together.

Align on Goals and KPIs

Communicate Regularly

Focus on Lead Quality

Measure and Share Results

Improve Together Continuously



Sales Process Optimization Checklist

Continuously optimize your sales process to eliminate bottlenecks, improve efficiency, and accelerate predictable revenue growth. Use this checklist to identify opportunities for optimization.

Sales Process Health Overview

Process Efficiency
___/100
To be calculated

Cycle Time
___/100
To be calculated

Conversion Efficiency
___/100
To be calculated

Automation Level
___/100
To be calculated

Data Quality
___/100
To be calculated

Scalability
___/100
To be calculated

Optimization Impact

→ → → →

YOUR SCORE

___/100

To be calculated

Checklist Item	What to Evaluate	Yes	No	N/A	Notes
Process Clarity	Is the sales process clearly documented and easy to follow?	☐	☐	☐	.....
Bottleneck Identification	Have bottlenecks and delays in the sales process been identified?	☐	☐	☐	.....
Cycle Time Optimization	Are you actively working to reduce sales cycle length?	☐	☐	☐	.....
Approval Processes	Are approval steps necessary, simple, and not causing unnecessary delays?	☐	☐	☐	.....
Automation	Are repetitive tasks automated where possible?	☐	☐	☐	.....
Data Management	Is customer and sales data accurate, complete, and up to date?	☐	☐	☐	.....
Tools & Technology	Are tools well-integrated and enabling your team?	☐	☐	☐	.....
Sales Training	Is the sales team trained on best practices and process updates?	☐	☐	☐	.....
Performance Tracking	Are KPIs used to monitor process performance?	☐	☐	☐	.....
Continuous Improvement	Do you regularly review and improve the sales process?	☐	☐	☐	.....

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall sales process optimization score.

SCORING GUIDE

90 – 100

Excellent

– Highly optimized process driving maximum efficiency and results.

75 – 89

Good

– Well-optimized process with minor areas to enhance.

50 – 74

Needs Work

– Moderate optimization; several opportunities for improvement.

Below 50

At Risk

– Inefficient process; immediate optimization required.

Pro Tip
Small, consistent improvements compounded over time lead to significant results.

Map Your Process

Identify & Remove Bottlenecks

Automate Repetitive Tasks

Measure Performance

Optimize Continuously

Customer Retention & Loyalty Strength Checklist

Strong retention and loyalty drive repeat business, higher lifetime value, and sustainable growth. Use this checklist to evaluate your retention and loyalty strategies and execution.

Retention Overview

Customer Retention Rate

___/100

To be calculated

Repeat Purchase Rate

___/100

To be calculated

Loyalty Program Engagement

___/100

To be calculated

Customer Satisfaction

___/100

To be calculated

Churn Rate (Lower is Better)

___/100

To be calculated

Net Promoter Score (NPS)

___/100

To be calculated

Loyalty Health Indicator

1

2

3

4

5

Very Weak

Weak

Average

Strong

Excellent

YOUR SCORE

___/100

To be calculated

Checklist Item	What to Evaluate	Yes	No	N/A	Notes
Onboarding Experience	Is the onboarding process smooth, helpful, and sets clear expectations?	☐	☐	☐	.....
Value Delivery	Do you consistently deliver value that meets or exceeds customer expectations?	☐	☐	☐	.....
Customer Engagement	Do you engage customers regularly with relevant communications and updates?	☐	☐	☐	.....
Loyalty Programs	Do you have a loyalty program that rewards and encourages repeat business?	☐	☐	☐	.....
Feedback & Listening	Do you actively seek customer feedback and act on it?	☐	☐	☐	.....
Customer Support	Is support easy to reach, responsive, and effective in resolving issues?	☐	☐	☐	.....
Retention Analytics	Do you track retention, churn, and repeat purchase metrics regularly?	☐	☐	☐	.....
Personalization	Do you personalize experiences and offers based on customer behavior and preferences?	☐	☐	☐	.....
Win-back Strategy	Do you have a win-back strategy for inactive or at-risk customers?	☐	☐	☐	.....
Loyalty Culture	Is loyalty a shared goal across your team and reflected in company culture?	☐	☐	☐	.....

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall retention & loyalty strength score.

SCORING GUIDE

90 – 100

Excellent

–

Exceptional retention and loyalty driving sustainable growth.

75 – 89

Good

–

Strong retention and loyalty with minor areas to improve.

50 – 74

Needs Work

–

Moderate retention and loyalty; several gaps need attention.

Below 50

At Risk

–

Weak retention and loyalty; immediate action required.

Pro Tip
Retention is built on consistent value, strong relationships, and a customer-first mindset.

Deliver Consistent Value

Engage Regularly

Listen & Act on Feedback

Reward Loyalty Meaningfully

Monitor & Improve Continuously

Data Quality & Management Checklist

High-quality data is the foundation of accurate insights, effective automation, and better decisions. Use this checklist to ensure your data is accurate, consistent, secure, and well-managed.











Data Quality Overview

Data Accuracy
___/100
To be calculated

Data Completeness
___/100
To be calculated

Data Consistency
___/100
To be calculated

Duplicate Rate
___/100
To be calculated

Data Timeliness
___/100
To be calculated

Data Validity
___/100
To be calculated

Data Security
___/100
To be calculated

Data Governance
___/100
To be calculated

Data Quality Health

1

2

3

4

5

Poor

Fair

Average

Good

Excellent

YOUR SCORE

___/100

To be calculated



Checklist Item	What to Evaluate	Yes	No	N/A	Notes
 Data Accuracy	Is the data free from errors and accurately reflects reality?	☐	☐	☐	.....
 Data Completeness	Is all required data captured and no important fields left blank?	☐	☐	☐	.....
 Data Consistency	Is data consistent across different systems and sources?	☐	☐	☐	.....
 Duplicate Management	Are duplicate records identified, merged, and prevented?	☐	☐	☐	.....
 Data Timeliness	Is data updated regularly and available when needed?	☐	☐	☐	.....
 Data Validity	Does data follow defined formats, rules, and validation checks?	☐	☐	☐	.....
 Data Security	Is sensitive data protected with proper access controls?	☐	☐	☐	.....
 Data Governance	Are data ownership, policies, and responsibilities defined?	☐	☐	☐	.....
 Data Quality Monitoring	Do you regularly monitor and measure data quality?	☐	☐	☐	.....
 Data Improvement	Are data issues tracked and improved continuously?	☐	☐	☐	.....

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall data quality & management score.

SCORING GUIDE

90 – 100

Excellent

– Data is accurate, complete, secure, and well-governed.

75 – 89

Good

– Data quality is strong with minor improvements needed.

50 – 74

Needs Work

– Moderate data quality; several gaps need attention.

Below 50

At Risk

– Poor data quality and management; immediate action required.



Pro Tip

Good data quality leads to better decisions, efficient automation, and stronger customer relationships.



Validate Data at Entry



Regularly Clean and Update Data



Monitor Quality Continuously



Enforce Data Governance



Use Data to Drive Decisions

LeadPilot

Audit. Optimize. Accelerate Revenue.

Automation & Workflow Excellence Checklist

Automation and smart workflows save time, reduce manual effort, improve accuracy, and ensure nothing falls through the cracks. Use this checklist to evaluate and enhance your automation and workflow capabilities.

Automation Maturity Overview

Workflow Automation ___/100 To be calculated	Email Automation ___/100 To be calculated	Task Automation ___/100 To be calculated	Integration Automation ___/100 To be calculated
Trigger & Timing Accuracy ___/100 To be calculated	Error Handling & Recovery ___/100 To be calculated	Automation Performance ___/100 To be calculated	ROI from Automation ___/100 To be calculated

Automation Maturity Scale

1

Manual

2

Basic

3

Structured

4

Advanced

5

Intelligent

YOUR SCORE

___/100

To be calculated

Checklist Item	What to Evaluate	Yes	No	N/A	Notes
Workflow Automation	Are key workflows automated to reduce manual steps and handoffs?	☐	☐	☐	.....
Email Automation	Are email sequences and follow-ups automated and personalized?	☐	☐	☐	.....
Task Automation	Are tasks created, assigned, and updated automatically?	☐	☐	☐	.....
Integration Automation	Are data syncs and integrations automated across systems?	☐	☐	☐	.....
Trigger Accuracy	Are automation triggers set up accurately and firing as expected?	☐	☐	☐	.....
Error Handling	Are errors detected, alerted, and handled gracefully?	☐	☐	☐	.....
Automation Performance	Are automations running efficiently without unnecessary delays?	☐	☐	☐	.....
ROI from Automation	Is automation delivering measurable time savings and business impact?	☐	☐	☐	.....
Notification Automation	Are notifications and alerts automated and relevant?	☐	☐	☐	.....
Continuous Optimization	Are automations reviewed and optimized regularly?	☐	☐	☐	.....

YOUR SCORE

___/100

To be calculated

Add up the points based on your responses and compare with the scoring guide to determine your overall automation & workflow excellence score.

SCORING GUIDE

90 – 100	Excellent	- Intelligent automation delivering outstanding results.
75 – 89	Good	- Well-automated with minor improvement opportunities.
50 – 74	Needs Work	- Moderate automation; several areas need attention.
Below 50	At Risk	- Low automation maturity; immediate improvements required.

Pro Tip

Automate smarter, not just more. Focus on high-impact, repetitive tasks first and continuously refine your workflows.

Map & Document Workflows

Automate Repetitive Tasks

Monitor & Measure Performance

Handle Errors Proactively

Optimize & Scale Continuously

Your Priority Action Plan

Focus on what matters most.

Use this action plan to turn your checklist insights into high-impact actions that drive real improvement and results.

How to Use This Plan



- 1. Review**
Go through your checklist results and identify gaps.
- 2. Prioritize**
Select the top 3–5 areas that need immediate attention.
- 3. Plan**
Define actions, owners, and target dates for each priority.
- 4. Execute**
Take action and mobilize your team.
- 5. Review**
Track progress and adjust your plan regularly.

★ **Focus on Progress, Not Perfection.**
Small, consistent actions create big results over time.





My Priority Action Plan

Priority Rank	Focus Area (From Checklist)	Why It's Important	Key Action	Owner	Target Date	Status
1	 Add your top priority focus area	Explain the impact and benefit of improving this area	What specific action will you take?	 _____	 _/_/___	Not Started
2	 Add your second priority focus area	Explain the impact and benefit of improving this area	What specific action will you take?	 _____	 _/_/___	Not Started
3	 Add your third priority focus area	Explain the impact and benefit of improving this area	What specific action will you take?	 _____	 _/_/___	Not Started
4	 Add your fourth priority focus area	Explain the impact and benefit of improving this area	What specific action will you take?	 _____	 _/_/___	Not Started
5	 Add your fifth priority focus area	Explain the impact and benefit of improving this area	What specific action will you take?	 _____	 _/_/___	Not Started



Celebrate Every Win!
Acknowledge progress and keep the momentum going.



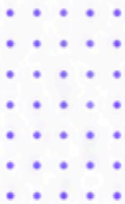
Review Cadence
Review this plan weekly to track progress, remove roadblocks, and update priorities.



My Notes & Next Steps



Final Pipeline Score



This is your overall pipeline score based on your audit results across all critical areas. Calculate your score, rate your pipeline health, and identify where to focus next.

YOUR FINAL PIPELINE SCORE



____ /100

CALCULATE YOUR FINAL SCORE

AUDIT AREA			SCORE (OUT OF 10)
1		CRM Data Hygiene	____ / 10
2		Pipeline Coverage	____ / 10
3		Deal Qualification	____ / 10
4		Pipeline Velocity	____ / 10
5		Forecast Accuracy	____ / 10
6		Sales Activity	____ / 10
7		AI & Automation	____ / 10
8		Reporting & Dashboards	____ / 10
9		Sales Management	____ / 10
10		Pipeline Risks	____ / 10

OVERALL SCORE

TOTAL

____ /100

PIPELINE HEALTH RATING

- ☐ 90 – 100 → World-Class Revenue Engine
- ☐ 75 – 89 → Strong Pipeline
- ☐ 60 – 74 → Needs Optimization
- ☐ Below 60 → Immediate RevOps Attention Required



TOP 5 STRENGTHS

- _____
- _____
- _____
- _____
- _____



TOP 5 IMPROVEMENT AREAS

- _____
- _____
- _____
- _____
- _____



EXECUTIVE NOTES

- _____
- _____
- _____
- _____
- _____

REVIEWED BY

Name

Title

Date

Signature

_____/_____/_____

You've Completed Your Pipeline Audit

Well done on taking the time to audit your sales pipeline.

This workbook is designed to give you clarity, identify gaps, and help you take action. Use your insights to strengthen your pipeline, drive predictable revenue, and achieve sustainable growth.

Audit. Optimize. Accelerate Revenue.

WHAT'S NEXT?



Implement Your Action Plan

Focus on the top priorities and improvement areas you identified.



Track Progress Consistently

Review your metrics regularly and measure what truly matters.



Align Your Team

Ensure everyone is aligned on goals, processes, and expectations.



Optimize & Automate

Leverage automation and smart workflows to drive efficiency and results.



Drive Predictable Growth

Build a strong pipeline today for a more predictable revenue tomorrow.

“ A strong pipeline isn't luck.
It's built with clarity, focus, and action.

Keep refining. Keep improving. And keep your pipeline healthy and full of high-quality opportunities.



Need Help Taking Action?

We're here to help you turn your audit insights into real results.



Book a Strategy Call

Let's build your revenue engine together.



YOUR FINAL NOTES
