The 8-Zone GTM OS Audit Checklist

A diagnostic tool for leadership teams to identify revenue friction and alignment gaps.

Zone 1: Executive Leadership Engagement

Primary KPI: Net Revenue Retention (NRR)

- [ ] Unified vision across C-Suite regarding ICP and growth strategy.
- [ ] Leadership is active in strategic account renewals and expansion.
- [ ] Resource allocation is data-driven based on retention metrics.

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., Siloed departments, lack of executive presence in key accounts

Zone 2: Marketing & Demand Generation

Primary KPI: Pipeline Velocity

- [ ] Marketing is measured on pipeline speed/volume, not just lead count.
- [ ] Messaging creates immediate urgency and reduces "Education" time.
- [ ] Clear attribution exists to identify high-velocity channels.

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., High lead volume but low intent, "Franken-messaging"

Zone 3: Lead Gen to Pipeline Building

Primary KPI: SQL to Opportunity Conversion Rate

- [ ] Sales/Marketing SLA is in place for lead follow-up timing.
- [ ] SDRs/BDRs effectively disqualify to protect AE calendars.
- [ ] Standardized criteria exists for what defines a "Real Opportunity."

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., Leads dying in "no man's land," inconsistent qualification

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Zone 4: Continuous Process Improvement

Primary KPI: Sales Cycle Length

- [ ] Regular "Win/Loss" analysis is performed and shared.
- [ ] Sales playbooks are updated based on actual field performance.
- [ ] Friction points in contracting/legal have been minimized.

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., Deals stalling at the 11th hour, manual/clunky legal reviews

Zone 5: Leverage Technology

Primary KPI: Sales Productivity

- [ ] Administrative tasks (data entry, logging) are automated.
- [ ] Data flows seamlessly between CRM, Marketing, and Success tools.
- [ ] Reps spend >60% of their day on Revenue Generating Activities.

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., "Siloed" tools, reps spending hours on manual CRM updates

Zone 6: Individual Contributor Excellence

Primary KPI: Salesperson Quota Attainment

- [ ] Revenue is distributed across the team, not just a few superstars.
- [ ] Onboarding hits "Full Productivity" in <4 months.
- [ ] Weekly coaching focuses on skill development, not just pipeline updates.

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., High turnover, 80% of revenue coming from 20% of reps

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Zone 7: Partnership Programs

Primary KPI: Partner-Influenced Revenue

- [ ] Partnerships are a proactive revenue channel, not just reactive referrals.
- [ ] Co-selling motions are established with key ecosystem partners.
- [ ] Partners are enabled to pitch the value prop accurately.

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., Partnerships exist on paper but don't drive real pipeline

Zone 8: Customer Success

Primary KPI: Gross Revenue Retention (GRR)

- [ ] Formal handoff from Sales to CS preserves customer trust.
- [ ] Health scores are predictive of churn 90 days in advance.
- [ ] Delivery consistently meets the "Initial Value" promised during the sale.

Score: ____ / 5 **Priority (H / M / L): ____**

Notes & Blockers:
e.g., High churn due to overselling, reactive customer support

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The GTM OS Summary Table

Zone	Primary Metric	Score (1–5)	Priority (H/M/L)
1. Executive	Net Revenue Retention		
2. Marketing	Pipeline Velocity		
3. Lead Gen	SQL to Opp Conversion		
4. Process	Sales Cycle Length		
5. Tech	Sales Productivity		
6. Talent	Quota Attainment		
7. Partners	Partner-Influenced Revenue		
8. Success	Gross Revenue Retention		

Audit Totals

Total Score: _____ / 40

Top 3 Gaps Identified:

Next step: Bring your scores to a 30-minute working session with a REVGEN Operating Partner — calendly.com/revgengtm/30

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