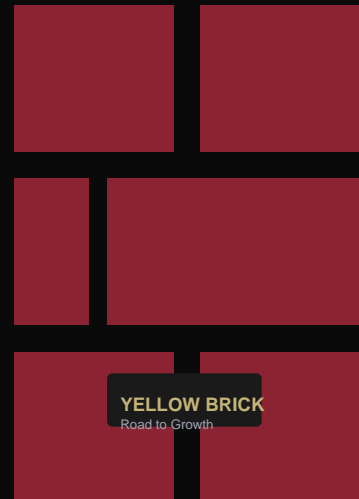


2026

Revenue Efficiency Assessment



DIAGNOSE | PLAN | SCALE

What you get:

- A diagnostic that finds where revenue leaks and budget waste hide.
- A step-by-step framework to audit operations, software, and pipeline.
- 20 actions to fix what the diagnostic finds. Documented, measurable.

TL;DR

***Revenue efficiency diagnostic:
The questions that expose where money
and time bleed.***

TARGET MARKET

- Have you defined your market segments with measurable criteria?
- Do you know your customers' pain points, buying triggers, and budget cycles?

VALUE PROPOSITION

- Can a prospect explain what you do and why it matters in one sentence?
- Does your value prop name a specific outcome, not a capability?

PRODUCT-MARKET FIT

- Have you confirmed fit through sales data or direct customer feedback?
- Are your products solving the problem customers hired them for?

***If you were your customer, would you buy from your business?
Why or why not?***

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Your revenue has a leak. This diagnostic finds it.

Most companies know something is off. Revenue is flat. Tools cost more every year. The team works harder but the pipeline stays the same.

The problem is rarely one big thing. It is dozens of small ones: a CRM nobody trusts, a marketing stack with zero attribution, manual processes that eat 40 hours a week, software licenses renewed on autopilot.

This diagnostic asks the questions that expose where money and time bleed. Not theory. Direct questions about your operations, your tools, your sales process, your team.

Answer honestly. Score yourself. The gaps will be obvious.

Yellow Brick exists to fix what this diagnostic finds. We audit the waste, spec the replacement, build it, migrate you off the old system, and support what we built. Five phases. Milestone payments. You own everything we deliver.

If you want help interpreting your results, or if you already know where the problems are: book 15 minutes. No deck. No pitch. The numbers.

Ravi Karwal

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02

Go-to-Market Strategy

(High Priority)

Market understanding

- Have you defined and prioritized your target market segments?
- Do you understand your customer personas: pain points, goals, buying triggers?
- Have you conducted a competitive analysis covering strengths and positioning?
- Are you tracking market trends that could change your strategy?

Value proposition

- Is your value proposition simple, specific, and focused on outcomes?
- Does it clearly differentiate you from competitors?
- Have you validated it through direct customer feedback?

Product-market fit

- Have you achieved measurable traction that confirms product-market fit?
- Are your offerings consistently meeting customer expectations?
- Do you have a product roadmap informed by customer feedback?

ACTIONABLE QUESTION

If you were your customer, would you buy from you? Why or why not?

03

Go-to-Market Strategy

(High Priority)

Strategic objectives

- Are your objectives specific, measurable, achievable, relevant, and time-bound?
- Have you defined clear KPIs and benchmarks to measure progress?
- Is there alignment across teams on strategic objectives?

Execution plan

- Does your plan include clear, actionable steps for each phase?
- Are roles, responsibilities, and dependencies well-defined?
- Have you set realistic timelines and milestones?

Budget and resources

- Is your budget aligned with go-to-market objectives?
- Have you secured sufficient resources for execution?
- Are you reviewing budget allocation based on ROI?

04

Operations

(Medium Priority)

Process efficiency

- Are your workflows streamlined and automated where possible?
- Do you maintain documented SOPs for critical processes?
- Are you identifying and addressing bottlenecks?

Technology integration

- Are your systems integrated for clean data flow between teams?
- Are you using automation to reduce manual work and errors?
- Is your infrastructure secure and aligned with operational goals?

Data and analytics

- Do you have a unified data platform for accurate, timely decisions?
- Are you using analytics to surface trends and opportunities?
- Are clear governance policies in place to protect your data?

ACTIONABLE QUESTION

Where does your team spend the most time on work a system should handle?

05

Software & Tools

(Medium Priority)

Sales and marketing platforms

- Are your CRM and marketing tools fully used and integrated?
- Do your tools support personalization and pipeline attribution?
- Is there a regular process to evaluate and consolidate tools?

Customer success tools

- Do you have systems to manage onboarding, support, and retention?
- Are feedback tools providing insights you act on?
- Are you using predictive analytics to reduce churn?

Reporting and analytics

- Are reporting tools providing real-time insights?
- Do stakeholders have role-specific dashboards?
- Do analytics platforms identify trends automatically?

ACTIONABLE QUESTION

How much are you paying annually for software your team complains about?

06

Marketing

(High Priority)

Strategy and planning

- Is your marketing strategy aligned with business objectives?
- Does your plan outline clear goals, KPIs, and tactics backed by data?
- Are customer insights driving your strategy?

Execution and campaigns

- Are campaigns driving awareness, engagement, and conversions?
- Are you using a multi-channel approach?
- Do you A/B test and optimize based on performance?

Performance measurement

- Are KPIs well-defined to track marketing effectiveness?
- Do attribution models measure channel impact accurately?
- Are strategies adjusted based on performance data?

07

Sales

(High Priority)

Sales strategy

- Is your sales strategy aligned with business goals?
- Is your sales process documented with clearly defined stages?
- Are you using data and insights to refine tactics?

Sales team performance

- Is the team consistently hitting quotas?
- Do you offer structured onboarding, training, and coaching?
- Are tools in place to track individual and team performance?

Sales operations

- Are sales operations optimized and automated for efficiency?
- Do you provide the right enablement tools?
- Are forecasting tools used to manage pipelines?

ACTIONABLE QUESTION

If your top rep left tomorrow, could someone else follow the process and close?

08

Sales Team

(Medium Priority)

Team structure

- Is your team structured to maximize coverage and specialization?
- Are roles, responsibilities, and handoff points documented?
- Do you adjust structure based on performance data?

Skills and training

- Does your team have the skills to exceed their targets?
- Are you offering personalized training and coaching?
- Have you implemented a mentorship program?

Motivation and culture

- Are comp plans aligned with strategic sales goals?
- Have you built a high-performance culture?
- Do you recognize top performers consistently?

09

Customer Success

(Medium Priority)

Customer onboarding

- Is onboarding designed to deliver a value-driven experience?
- Are you balancing self-service with high-touch support?
- Do you track onboarding success with clear metrics?

Retention and renewal

- Are you monitoring customer health to address risks early?
- Do you have structured check-in and success plan processes?
- Are analytics refining retention and renewal strategies?

Customer advocacy

- Are you activating satisfied customers through referrals and case studies?
- Have you established a formal advocacy program?
- Do you engage customers through community and feedback channels?

ACTIONABLE QUESTION

What percentage of customers would refer you today without being asked?

10

Action Planning

(Implementation)

Prioritize initiatives

- Have you ranked initiatives by strategic alignment and impact?
- Are you focusing on quick wins that deliver immediate value?
- Is your approach phased to tackle high-priority areas first?

Build a detailed plan

- Have you created a 30-60-90 day plan with measurable objectives?
- Are tasks broken into weekly and monthly milestones?
- Have you assigned deadlines and ownership for each task?

Assign ownership

- Are responsibilities assigned to specific people or teams?
- Have you assembled a cross-functional team for execution?
- Are communication processes in place for coordination?

20 Actions with Yellow Brick

What we do with what the diagnostic finds

Conduct a full operational audit

Review go-to-market strategy, processes, and tools end to end. Identify waste, gaps, and opportunities.

Align strategic objectives

Partner with your CEO to align revenue targets with business goals. Coordinate departments to execute.

Refine your value proposition

Update your value prop to address current market needs. Validate with key customer segments.

Map your market

Research customer behaviors, preferences, and trends. Feed insights into strategy decisions.

Build targeted campaigns

Data-driven campaigns for high-priority segments. Multi-channel, measured by attribution.

Optimize your sales process

Simplify workflows for higher efficiency. Implement best practices for lead gen and deal closure.

Equip your sales team

Updated tools, training, and resources. Centralized content for consistent execution.

Launch customer success programs

Programs that increase satisfaction and retention. Use feedback to refine your approach.

Apply analytics to decisions

Analytics and AI to surface insights. Predictive models for trends and untapped opportunities.

Integrate your technology stack

Connect CRM, marketing automation, and ops tools. Automate repetitive tasks to free up time.

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20 Actions with Yellow Brick

What we do with what the diagnostic finds

Build role-specific dashboards

Actionable insights for each stakeholder. Data that is accessible and useful, not decorative.

Align budget to strategy

Map budgets to objectives. Review spending against ROI and performance regularly.

Fix internal communication

Streamline channels to align teams. Build transparency across functions.

Monitor industry trends

Track market trends and competitor moves. Adjust strategies to maintain position.

Reduce software waste

Audit every tool. Identify overlap, underuse, overpricing. Replace where the math supports it.

Build a content engine

Replace manual workflows with a single system. One input, many channels. Documented and supported.

Automate operational bottlenecks

Find the manual processes that eat the most hours. Build purpose-built automation you own.

Implement lead scoring

Models based on your data, not templates. Prioritize pipeline by probability and deal size.

Design post-acquisition integration

For PE/VC: standardize ops, consolidate tools, build shared infrastructure across the portfolio.

Establish review cadence

Weekly dashboards, monthly reviews, quarterly strategy adjustments. Milestone accountability.

Book 15 minutes. No deck. No pitch. The numbers.

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