REVOPS AUDIT TEMPLATE

RevOps audit checklist

Is your revenue engine ready to scale? Work through the four pillars of a RevOps audit, check for the six most common revenue leaks, then place your organization on the maturity model. Tick what's in place and note the evidence.

1
Gather the team
Leaders from Marketing, Sales, CS, RevOps and every system owner.

2
Check each pillar
Tick only what you can prove, and note the evidence.

3
Rank the gaps
Fix the unticked items with the highest revenue impact first.

THE FOUR PILLARS

PILLAR	THE QUESTION IT ANSWERS	CHECKS
01 People & alignment	Are teams working toward one revenue goal?	5
02 Processes & handoffs	Is your revenue engine operationalized?	5
03 Technology & systems	Is your tech stack working for you or against you?	14
04 Data & reporting	Do you have a single source of truth?	7

PLUS A REVENUE LEAK CHECK AND A MATURITY SCORE AT THE END.

PILLAR 01 OF 04

People & alignment

Are teams working toward one revenue goal?

LEADERSHIP

	CHECK	NOTES / EVIDENCE
☐	Leadership shares one definition of pipeline quality, stage definitions, customer health and revenue goals.	
☐	Priorities are coordinated across department heads, not set in isolation.	

ROLES AND ACCOUNTABILITY

	CHECK	NOTES / EVIDENCE
☐	Every lifecycle stage has a clear owner.	
☐	SLAs exist between Marketing, Sales and Customer Success.	
☐	Handoffs follow consistent, documented rules.	

PILLAR 02 OF 04

Processes & handoffs

Is your revenue engine operationalized?

FUNNEL ARCHITECTURE

	CHECK	NOTES / EVIDENCE
☐	MQL, SQL and SQO definitions are consistent across teams.	
☐	Qualification criteria are documented.	
☐	Conversion paths are measurable.	

HANDOFFS AND CUSTOMER JOURNEY

	CHECK	NOTES / EVIDENCE
☐	Handoffs between teams are documented, automated and monitored.	
☐	Onboarding, renewal and expansion run the same way across segments.	

PILLAR 03 OF 04

Technology & systems

Is your tech stack working for you or against you?

CRM HEALTH

	CHECK	NOTES / EVIDENCE
☐	Data is complete.	
☐	Pipeline is accurate.	
☐	Automation logic is correct.	
☐	Stages are used consistently.	
☐	Fields are clean and well-maintained.	

MARKETING AUTOMATION AND ENABLEMENT

	CHECK	NOTES / EVIDENCE
☐	Lead scoring and routing work as intended.	
☐	Nurture flows are current.	
☐	Data syncs accurately between systems.	
☐	Sales enablement triggers fire correctly.	
☐	System logic is documented.	

TECH BLOAT AND TOOL OVERLAP

	CHECK	NOTES / EVIDENCE
☐	You know which tools are actually used.	
☐	Overlapping systems are identified.	
☐	Broken integrations are found and fixed.	
☐	Duplicated workflows are removed.	

PILLAR 04 OF 04

Data & reporting

Do you have a single source of truth?

HYGIENE AND GOVERNANCE

	CHECK	NOTES / EVIDENCE
☐	Naming conventions, field requirements, lifecycle statuses and deduplication are standardized across systems.	

REPORTING FRAMEWORK

	CHECK	NOTES / EVIDENCE
☐	All departments use the same KPIs, definitions and reporting structure.	

FORECASTING ACCURACY

	CHECK	NOTES / EVIDENCE
☐	Conversion is consistent across stages.	
☐	Sales cycle length is stable.	
☐	Pipeline coverage is sufficient.	
☐	Past forecasts were accurate.	
☐	Expansion and churn signals are tracked.	

REVENUE LEAK CHECK

Where money quietly slips away

Each leak looks small on its own. Together they slow down the whole revenue engine. Tick each one you've checked and note what you found.

	CHECK	WHAT YOU FOUND
☐	Slow lead response times	
☐	Poor qualification discipline	
☐	Deals without next steps	
☐	Poorly managed renewals	
☐	Missed expansion opportunities	
☐	Inconsistent onboarding experiences	

MATURITY SCORE

Where does your revenue engine stand?

Tick the level that best describes you today. A scale-ready organization has predictable processes, clear roles, clean data, aligned leadership, and systems that support revenue movement.

	LEVEL	WHAT IT LOOKS LIKE
☐	**Early**	Processes undocumented, systems fragmented, data unreliable.
☐	**Emerging**	Some structure exists, but alignment and tech gaps remain.
☐	**Established**	Strong processes, consistent data, functional automation.
☐	**Advanced**	High operational discipline, clean data, automated workflows, strong forecasting.

WANT AN OUTSIDE VIEW?

DevriX runs RevOps audits across people, processes, technology and data, and stays to fix what we find. Request the audit at devrix.com/revenue-operations/auditing.