

Revenue Health Check (RHC)

Find your 3 biggest revenue leaks in 2 weeks

A fast diagnostic for growth-stage SaaS, AI, and industrial-tech vendors selling into asset-intensive markets. You leave with clarity on what to fix first so your team can move faster.

1. Does this look familiar

- Pipeline starts the quarter under 2x coverage
- Win rate under 20% or demo-to-close under 10%
- Deals sit in legal or finance for 45+ days
- Forecast variance swings more than 25% versus commit
- Discounts above 15% cut into margin
- "No decision" shows up too often in loss reasons

If two or more sound familiar, the Health Check shows exactly where revenue is leaking and what to prioritize.

BEFORE RHC	AFTER RHC
Thin pipeline, late-stage stalls, forecast you don't trust	Baselines that matter, a ranked problem map, and a 90-day plan

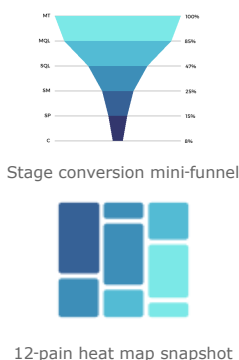
2. What is the Revenue Health Check

Two weeks. Light lift for your team. A clear picture of where pipeline, deals, and forecast discipline are breaking down, plus a short plan to focus the next 90 days.

This is a diagnostic and roadmap. Your team runs execution. I advise and coach leaders to move quickly.

3. In 2 weeks, you walk away with

- **Baselines that matter**
Stage conversion, win rate, and forecast variance you can track from here on.
- **A ranked problem map**
A 12-pain heat map that separates Critical from Nice-to-Fix.
- **A short, actionable plan**
Top 3 fixes with effort and ROI ranges, owners, and a clear 90-day plan.
- **Decision meeting**
A 60-minute executive readout to align the team and lock next steps.



4. How it works

- **Week 1: Interviews and analysis**
CRM and forecast review. Conversion analysis. Four targeted stakeholder interviews to ground the findings.
- **Week 2: Findings and plan**
Baselines, the 12-pain heat map, the Top 3 fixes, and the executive readout.

This sprint is engineered to give your team clarity in two weeks.

5. Designed for tech vendors selling into asset-intensive industries

This Health Check is for **technology vendors**. That includes SaaS platforms, AI software, connected hardware, and advanced industrial equipment providers that sell into asset-intensive markets.

My customers usually sell into:

- Manufacturing and Materials
- Infrastructure and Construction
- Energy and Utilities
- Metals and Mining

Primary geographies United States, Canada, United Kingdom. Select work in Europe and Latin America. English and Spanish.

6. Why leaders book this

- Give your board a forecast you can stand behind
- Reduce surprises in the numbers and protect margin
- Shift managers from super-rep mode to a system they can coach
- Get an outside read on execution risk and a 90-day plan

Less costly than a missed quarter. Faster than a CRO search.

7. Who benefits most

- **For founders:** a forecast you can stand behind
- **For sales leaders:** one operating rhythm the team follows
- **For finance:** fewer surprises and cleaner margin
- **For investors:** a clear plan you can track

8. Proven track record

In past leadership roles I've helped scale companies by:

- **3x ARR** in <12 months at two scale-ups
- **7x Pipeline Growth** year over year
- **30% Shorter Cycles** with stronger qualification
- **\$20M+ Contracts** with global leaders

While the Health Check itself is diagnostic, it applies the same operator-level lens that drove those results.

9. What we'll need to start

- Read-only CRM access
- Last-quarter forecast
- Top 3 active deals
- Four stakeholder interviews scheduled in Week 1

Many teams use the Health Check output to launch the 90-day Sales Engine Accelerator. **If you start the Accelerator within 30 days, I'll credit 50% of the Health Check fee.**

Let's talk

Ready to see where your revenue is leaking?

Book a 20-minute intro. We'll confirm fit, align the questions for your Revenue Health Check, and reserve a two-week window.

**Book a
20-minute
intro**

