

LEAD DIAGNOSTIC / 24 POINTS

THE REVENUE VELOCITY CHECKLIST

The 3-step system we use to turn marketing from an expense line into a revenue lever.

1000+ BUSINESSES SCALED

23+ YEARS

\$1B+ REVENUE GENERATED

01

POTENTIAL

Do you know the size of the prize?

Tick what is true today, not what you intend to fix.

02

PERFORMANCE

Do you know which lever is broken?

Fill in every number. Estimates are fine, blanks are not.

03

PROGRESSION

Do you know the math that decides scale?

Total your score on page 6.

STEP 01

POTENTIAL

Guessing the size of your market is expensive. Size the prize before you fund the plan.



TAM, TOTAL ADDRESSABLE MARKET (ORGS)

SAM, AFTER GEOGRAPHY AND MODEL FIT

SOM, YEAR ONE WINNABLE

AVERAGE CLIENT VALUE

CLOSE RATE

\$

%

SOM REVENUE = SOM X ACV X CLOSE RATE

\$

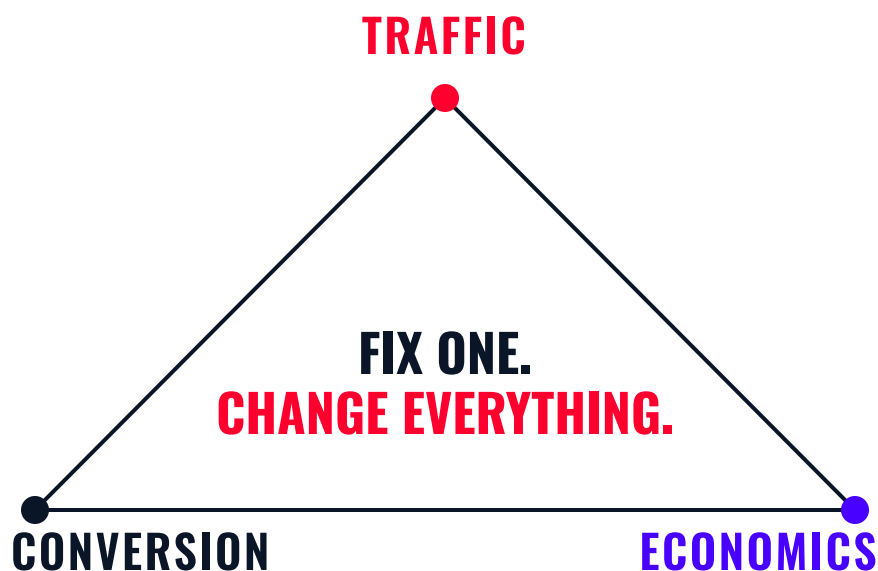
WORKED EXAMPLE. TAM 5,000 ▶ SAM 1,200 ▶ SOM 300 ▶ x \$25,000 x 25% = **\$1,875,000**

TICK WHAT IS TRUE TODAY. /6

- ☐ Have you defined your TAM with a source, not a guess?
- ☐ Have you filtered TAM to SAM using geography, model fit, and sales capacity?
- ☐ Have you defined a SOM with a dollar figure you would defend in a board meeting?
- ☐ Do you know which segment inside your SOM closes fastest?
- ☐ Does your current plan operate at SOM, not at TAM?
- ☐ Has anyone on your team revisited these numbers in the last 12 months?

MOST TEAMS PLAN AT TAM, FORECAST AT SAM, AND OPERATE IN SOM. THE GAP IS WHERE CAPITAL DISAPPEARS.

PERFORMANCE



TRAFFIC

MONTHLY QUALIFIED VISITORS

- ☐ Do you know which channel produces your highest closing leads?
- ☐ Can you separate fit traffic from volume traffic?
- ☐ Do you track lead source all the way to signed revenue?

CONVERSION

VISITOR TO LEAD LEAD TO CLOSE

- % %
- ☐ Does every page have one clear next step?
 - ☐ Do you respond to inbound leads within five minutes?
 - ☐ Is your proposal process documented and repeatable?
 - ☐ Do you know where prospects drop out of your funnel?

ECONOMICS

CAC LTV

- \$ \$
- LTV TO CAC RATIO
- ☐ Do you know your cost to acquire one client?
 - ☐ Does lifetime value cover acquisition cost with margin to spare?
 - ☐ Do you know your margin per client, not per project?

Pouring more traffic into a broken funnel makes you spend money faster. Which one is broken? Circle it.

TRAFFIC / **CONVERSION** / **ECONOMICS**

STEP 03

PROGRESSION

Sustained growth is engineered, not accidental.

ACV

Average client value, full relationship

\$ _____

CRP

Close rate percentage, last 90 days

_____ %

TTC

Time to close, in days

OPP

Opportunities per month

THE VELOCITY EFFECT

$$\text{Revenue Velocity} = (\text{OPP} \times \text{ACV} \times \text{CRP}) / \text{TTC}$$

YOUR REVENUE VELOCITY \$ _____ PER DAY

40 OPP x \$25,000 x 25% / 30 DAYS

\$8,333

PER DAY



40 OPP x \$25,000 x 25% / 120 DAYS

\$2,083

PER DAY

Same deals, four times slower, momentum gone.

TICK WHAT IS TRUE TODAY. /4

☐ Do you know your close rate to the percentage point, right now?

☐ Do you know your time to close in days, not roughly?

☐ Do you know what one new client is worth over the full relationship?

☐ Do you review these three numbers monthly?

PERMISSION TO SCALE

DOUBLE DOWN IS A CHECKLIST, NOT A GUT CALL

Most teams scale too early. All four conditions have to be true before you add pressure.



CLOSE RATE IS PREDICTABLE

Three months of consistent CRP from the same lead source.



CAC IS STABLE ACROSS VOLUME

Acquisition cost holds when you double the spend.



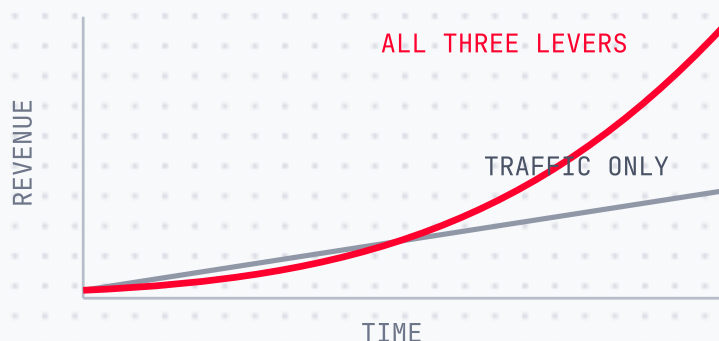
LTV SUPPORTS THE CEILING

Lifetime value covers acquisition cost with margin to spare.



TTC IS MANAGEABLE AND SHORTENING

Pipeline moves faster quarter over quarter.



Adding traffic alone delivers a modest, steady return. Improving all three levers together bends the curve upward.

ALL FOUR TICKED?

You have earned the right to apply pressure.

FEWER THAN FOUR?

Fix the gap first.

YOUR SCORE

TOTAL THE SHEET

THIS IS THE NUMBER

One point per ticked box. Write each step total in the box, then add them up.

POTENTIAL

_____ /6

PERFORMANCE

_____ /10

PROGRESSION

_____ /4

SCALE READY

_____ /4

TOTAL _____ /24

READ YOUR DIAGNOSIS.

LOWEST IN POTENTIAL

You are funding activity without a defined prize. Start with market sizing.

**LOWEST IN
PERFORMANCE**

You have a choke point. Fix the lever before you add spend.

**LOWEST IN
PROGRESSION**

You are scaling without the math. Confirm the economics first.

BE HONEST WITH YOURSELF. WHICH STEP IS YOUR BUSINESS STUCK ON? THAT IS WHERE WE START.

FOUR ACTIONS FROM HERE

01 SIZE YOUR POTENTIAL

Define TAM, SAM, and SOM with real numbers.

02 FIND YOUR CHOKE POINT

Audit traffic, conversion, and economics.

03 CONFIRM ECONOMICS, THEN SCALE

Validate ACV, CRP, and TTC before you add spend.

04 BOOK YOUR POTENTIAL ASSESSMENT

We run the numbers with you. No charge, no obligation.

YOUR TURN.

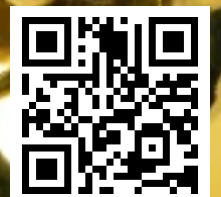
**MARKETING IS A MATH PROBLEM
WITH A CREATIVE WRAPPER. GET THE
MATH RIGHT AND THE CREATIVE
WORK GETS EASIER.**

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SCAN TO BOOK

