

ILLUSTRATIVE SAMPLE — FICTIONAL COMPANY, NOT A REAL CLIENT

# Where the pipeline leaks, and what to fix first

An illustrative sample built on a fictional company, to show the format and depth of the deliverable. Every figure is invented.

## SAMPLE SCENARIO

**Northwind Signal** — fictional Series A B2B SaaS, ~£6M ARR, HubSpot + Salesforce, two AEs, one marketing manager, no dedicated ops hire.

Reported at kickoff: “Marketing hits its MQL target every month; sales says the leads are junk. The board asked why paid spend is up 40% but new pipeline is flat.”

## DIAGNOSTIC SCORECARD — ALL SIX LENSES

| LENS                                   | RATING | READ                                                                                                               |
|----------------------------------------|--------|--------------------------------------------------------------------------------------------------------------------|
| 01 · CRM architecture & hygiene        | 3 / 5  | Workable model; 11% duplicate contacts, ownership gaps on ~1,900 records.                                          |
| 02 · Lead lifecycle & the handoff      | 2 / 5  | MQL = form-fill only; no routing SLA; median speed-to-lead 19h.                                                    |
| 03 · Data quality & enrichment         | 3 / 5  | 34% of MQLs missing company size — routing keys off that field, so those leads can’t be sized or routed correctly. |
| 04 · Attribution & reporting integrity | 2 / 5  | HubSpot and Salesforce report different quarterly numbers; board deck rebuilt by hand.                             |
| 05 · The integration layer             | 3 / 5  | Contact sync healthy; 6 field mappings silently dropping on opportunity stage.                                     |
| 06 · Automation & AI quick wins        | 4 / 5  | Good foundation; three workflow wins available inside two weeks.                                                   |

**Headline.** The leak is concentrated in lenses 02 and 04 — the handoff, and the reporting that hides it. Paid spend rose; the extra volume died in a handoff with no SLA, and the reporting disagreement meant nobody could see it.

Finding L2-03 — no routing SLA; high-intent leads wait a median 19 hours

**Evidence (observed).** 1,204 MQLs created Apr–Jun (HubSpot export, timestamped). Median MQL→first sales touch: 19h 12m; 90th percentile 3.1 days. Demo-request leads — the highest intent — sat in the same unsegmented queue (median 17h).

**Observation vs judgement (kept separate).** Observed: no lifecycle automation routes demo requests differently from content MQLs. Judgement: this is the largest recoverable leak — high-intent leads are treated identically to newsletter sign-ups.

**Illustrative impact.** ~120 demo-intent leads per quarter waiting >5h. The point of the finding is the fix, not a promised number — but even a conservative recovery dwarfs the audit fee.

**Roadmap.** Item R1 below — high impact, low effort.

90-DAY ROADMAP — PRIORITISED, IMPACT VS EFFORT

| FIX                                                                       | IMPACT | EFFORT | WINDOW     |
|---------------------------------------------------------------------------|--------|--------|------------|
| R1 · Split demo-intent from content MQLs; 1-hour routing SLA + alert      | High   | Low    | Weeks 1–2  |
| R2 · Single source of truth for quarterly reporting; reconcile HubSpot↔SF | High   | Med    | Weeks 2–5  |
| R3 · Repair 6 dropped opportunity-stage field mappings                    | Med    | Low    | Week 2     |
| R4 · Dedupe + ownership backfill (~1,900 records)                         | Med    | Med    | Weeks 3–6  |
| R5 · Enrichment on the company-size gap to make routing reliable          | Med    | Med    | Weeks 4–8  |
| R6 · Three automation quick wins (lens 06)                                | Low    | Low    | Weeks 6–10 |

Sequenced so the highest-impact, lowest-effort fixes land first — and so R1/R2 (the actual leak) aren’t blocked waiting on housekeeping. Even if your own audit surfaces fewer issues, you keep the scorecard and a baseline your team can track against every quarter.

This is what your audit would look like.

Book a pipeline health check →