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Find your revenue bottleneck

Choose one evidence-based improvement to test.

Use with sales, finance and delivery. Select one customer segment and a comparable opportunity cohort. Record the period and outcomes; keep open deals separate. This is a practical discussion aid, not a validated assessment.

How to use this worksheet

1. Inspect targeting, opportunity creation, conversion, economics, capacity and retention.

2. Separate observations from explanations. Compare a stalled deal with a useful win.

3. Choose one constraint hypothesis and an alternative explanation.

4. Agree one change, an owner, a review date and evidence of progress.

Worked illustration

Illustrative example: 20 completed opportunities include five wins, nine competitive losses and six no-decisions. With no-decisions recorded as losses, the win rate is 5/20 = 25%. Missing implementation detail suggests testing a pre-proposal delivery discussion. It does not prove why every deal was lost.

No industry benchmark is implied. Match the observation window to the sales cycle. Changes in revenue alone do not establish causation.

Your working record

Segment and offer / owner / review date

Cohort period, observation window and stage definitions

Wins / competitive losses / no-decisions / open opportunities (separate)

Where progress stops and evidence from work samples

Constraint hypothesis and alternative explanation

One intervention / responsible person / resources

Behavior to observe and commercial indicator to monitor

Result, other changes, and next decision: continue / adapt / stop