CHECKLIST: Sales Report Audit

Tick each question that applies to your business

1. Lead Source & Attribution

- ☐ Are all leads accurately tagged by source (e.g. paid, organic, referral, outbound)?
- ☐ Can you track revenue back to the original marketing campaign or touchpoint?
- ☐ Do you use a consistent attribution model (first-touch, last-touch, or multi-touch)?
- ☐ Are marketing and sales aligned on how attribution is defined?

2. Funnel & Deal Stage Visibility

- ☐ Can you view conversion rates between each stage of your sales pipeline?
- ☐ Is there clear visibility into where leads are stalling or dropping off?
- ☐ Are funnel stages consistently defined and used across your sales team?
- ☐ Do you review stage-level performance regularly to identify bottlenecks?

3. Pipeline Velocity & Sales Cycle

- ☐ Do you track average sales cycle length by product, persona, or deal size?
- ☐ Are you able to measure pipeline velocity over time?
- ☐ Can you identify trends in how long deals sit in each stage?
- ☐ Is your velocity data used in forecasting or sales planning?

4. Sales Rep Performance

- ☐ Do your reports track win rates and deal value per sales rep?
- ☐ Can you compare rep performance across deal stages?
- ☐ Are there benchmarks in place to identify under- or over-performance?
- ☐ Is rep-level data used for coaching and resource allocation?

5. Forecasting & Accuracy

- ❑ Are your forecasts based on historical sales data and real-time deal progress?
- ❑ Can you compare forecasted vs. actual revenue on a regular basis?
- ❑ Do you track close probability or deal health as part of your reporting?
- ❑ Is your sales forecasting process consistent and repeatable?

6. Data Quality & Reporting Tools

- ❑ Are your sales reports pulling from clean, reliable data sources?
- ❑ Do your reports update automatically or require manual input?
- ❑ Are marketing and sales using the same source of truth?
- ❑ Can your reporting platform segment data by channel, persona, region, or product?

7. Actionability

- ❑ Are your reports reviewed regularly (e.g. weekly, monthly) by leadership?
- ❑ Can you easily spot underperforming channels or reps?
- ❑ Are insights from your reports used to adjust strategy, content, or outreach?
- ❑ Does your team feel confident using these reports to make decisions?

Scoring

0–15 checked boxes: Your reporting foundation needs work. You're flying blind on key revenue insights.

16–23 checked boxes: You're on the right track but missing key pieces to unlock full visibility and performance.

24+ checked boxes: You have a strong reporting system. Now it's time to optimize, automate, and scale.

Let our experts help you automate smarter.
Book your free CRM strategy session with Flux Digital Labs.