REVENUE LEAKAGE CHECKLIST

Find where revenue slips between closed deal and cash collected.

24 yes-or-no questions across six stages of the B2B customer lifecycle. It takes about 10 minutes, and every “no” points to a place worth a closer look.

Why revenue leaks

Revenue rarely disappears in one big mistake. It slips through small gaps: a contract term that never reaches billing, a credit applied without approval, an invoice waiting on someone who has moved on, or two systems that disagree about the same customer. Each gap is small. Together, they add up, and they usually stay hidden until a customer disputes an invoice or the numbers don't reconcile at month-end.

How to use this checklist

> Answer for how things work today, not how they're supposed to work.

> Mark “Yes” only if it happens consistently, not just most of the time.

> If you're not sure, mark “No.” Not knowing is a finding too.

> Count your “No” answers in each stage, then add them up on the last page.

STAGE 01

Sales handoff

Where most leaks start: what was sold doesn't fully reach the teams that deliver and bill it.

	QUESTION	YES	NO
1	Do closed deals reach onboarding and billing with every contract term filled in, including pricing, start date, billing frequency, and discounts?	☐	☐
2	Is there one place where the signed contract and its terms live?	☐	☐
3	Are non-standard terms, such as custom pricing, free months, or special payment terms, flagged before the deal closes?	☐	☐
4	Does someone own checking that what was sold matches what will be billed?	☐	☐

"No" answers in this stage: _____

STAGE 02

Onboarding and first invoice

The first invoice sets the tone for the whole account.

	QUESTION	YES	NO
5	Is there a defined trigger for the first invoice, such as signature, go-live, or a set date?	☐	☐
6	Does every new customer have a billing contact and correct billing details before the first invoice goes out?	☐	☐
7	When implementation is delayed, is billing notified if it affects the start date?	☐	☐
8	Does the first invoice go out on time for nearly every new customer?	☐	☐

"No" answers in this stage: _____

STAGE 03

Account changes

Upgrades, downgrades, credits, and cancellations are where small amounts disappear quietly.

	QUESTION	YES	NO
9	Do upgrades, downgrades, and add-ons reach billing without someone having to remember?	☐	☐
10	Do credits, refunds, and discounts require approval before they're applied?	☐	☐
11	Are renewals and cancellations tracked with dates billing can see in advance?	☐	☐
12	Can you see who approved each change and why?	☐	☐

"No" answers in this stage: _____

STAGE 04

Systems and data sync

When systems disagree about the same customer, invoices go out wrong or not at all.

	QUESTION	YES	NO
13	Do your CRM, billing platform, and accounting system agree on each customer's plan, price, and status?	☐	☐
14	Is it clear which system is the source of truth for each piece of customer data?	☐	☐
15	When a sync between systems fails, does someone get notified?	☐	☐
16	Are records across systems reconciled on a regular schedule, at least monthly?	☐	☐

"No" answers in this stage: _____

STAGE 05

Collections

Earned revenue isn't revenue until it's collected.

	QUESTION	YES	NO
17	Does every past-due account have a named owner?	☐	☐
18	Is there a consistent follow-up schedule for past-due invoices?	☐	☐
19	Are disputed invoices tracked and resolved together with Customer Success, not by Billing alone?	☐	☐
20	Do you review accounts receivable aging at least monthly?	☐	☐

"No" answers in this stage: _____

STAGE 06

Data hygiene and reporting

Clean records are what make every other stage work.

	QUESTION	YES	NO
21	Are duplicate and incomplete customer records reviewed and cleaned on a regular schedule?	☐	☐
22	Could you produce an accurate list of active customers and what each one pays within an hour?	☐	☐
23	Does billed revenue match contracted revenue when you compare them?	☐	☐
24	Is the process documented well enough that a new hire could follow it?	☐	☐

"No" answers in this stage: _____

Your score

Total “No” answers (out of 24): _____

0–3: Strong foundation

Your lifecycle is in good shape. Keep reviewing it monthly so new gaps don't creep in as you grow.

4–8: Likely leaking in specific areas

Start with the stage that has the most “No” answers. That's usually where the biggest gap is.

9 or more: Leaking across multiple handoffs

Revenue is probably slipping in several places at once. A full review of the lifecycle is worth the time.

What to do with your results

Pick the stage with the most “No” answers and fix one thing there first. Most gaps come down to three causes: no clear owner, no defined trigger, or two systems that don't talk to each other. Naming the owner and the trigger often fixes more than a new tool would.

Want a second set of eyes?

The Operations Assessment is a one-time review of how your customer lifecycle runs today, from sales handoff through collections, including data hygiene and revenue leakage. You get clear findings and prioritized recommendations. For more details, visit www.onestopsourcinggroup.com.

Book a 30-minute call at www.onestopsourcinggroup.com