

FREE DIAGNOSTIC TOOL

# The GTM Workflow *Audit Checklist.*

The same diagnostic framework we use to identify AI opportunities and execution gaps inside growth-stage B2B teams. **Twenty-four questions across four pillars.** Answer honestly. The pattern of "no" answers is your roadmap.

## How to use this checklist

Walk through each pillar with the leader who owns that function. Check the box only if the answer is a confident yes. Tally your unchecked items at the end and use the scoring guide to identify where to focus first.

## 01 Strategy & Positioning

*Does your team agree on who you serve and why you win?*

- We can articulate our ICP in one sentence and exclude buyers who don't fit it.
- Our positioning is documented and used consistently across Marketing, Sales, and Product.
- We have a current competitive battle card that reflects this quarter — not last year.
- Pricing and packaging are codified and the sales team can defend them without escalation.
- Our messaging hierarchy (problem, value, proof, CTA) is mapped to each stage of the buyer journey.
- We've reviewed and refined positioning within the last six months.

## 02 Content & Messaging Operations

*Can your team produce on-brand content without bottlenecks?*

- We have a content calendar that maps to revenue priorities, not just publishing cadence.
- Approved messaging is stored where Sales, Marketing, and CSMs can find it in under 60 seconds.
- We can produce a launch one-pager, customer email, and sales deck without a 2-week scramble.
- AI is used to draft, repurpose, or synthesize content — not just as a novelty.
- Content performance is tied to a measurable GTM outcome (pipeline, conversion, retention).
- Our voice and tone hold up across writers, channels, and quarters.

### 03 Sales Enablement & Workflow

*Can your sellers execute consistently without reinventing the wheel?*

- New AEs are productive within 60 days because enablement is documented, not tribal.
- Discovery questions, objection handling, and demo flows are standardized and updated quarterly.
- Marketing and Sales agree on what a qualified lead looks like — and the data backs it up.
- Sales is using AI for call summaries, follow-ups, or proposal drafts — not just for fun.
- Handoffs between SDR → AE → CS are documented with clear ownership.
- We can show sales-cycle length and win rate by segment, by quarter, without manual digging.

### 04 RevOps, Reporting & AI Readiness

*Is your team operating on data — or on instinct dressed up as data?*

- Our CRM is the source of truth — not a spreadsheet someone maintains on the side.
- Weekly pipeline review uses live dashboards, not a deck someone rebuilds every Monday.
- We've identified at least three repetitive workflows that AI could meaningfully accelerate.
- Tools we pay for are actually used — and we know the adoption rate of each one.
- Leadership reporting is automated, not assembled by a person at midnight on Sunday.
- We have a documented AI policy — what's approved, what's off-limits, and who owns it.

#### Scoring & Interpretation

20–24 boxes checked	DIALED IN
14–19 boxes checked	FUNCTIONAL, WITH GAPS
8–13 boxes checked	EXECUTION DRAG
0–7 boxes checked	FOUNDATIONAL REWORK

#### NEXT STEP

## Want a second pair of eyes on your results?

Book a free 15-minute strategy call. Share your unchecked items and we'll walk you through where to focus first — whether or not we end up working together.

[BOOK YOUR FREE GTM AUDIT](#)