



# Revenue Plateau Diagnostic

*Is your business hitting a ceiling — or breaking through one?*

This worksheet takes 10 minutes. Answer every question honestly — not how you wish things were, but how they actually are right now. Your answers will tell you exactly where your sales function is breaking down and what to fix first.

## SECTION 1 — Revenue & Pipeline Health

<p><b>Has your revenue grown meaningfully in the last 24 months?</b> <i>"Meaningfully" = more than 10% year over year, consistently.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
<p><b>Can you accurately forecast next quarter's revenue right now?</b> <i>Not best-case. A real number you'd stake your planning on.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
<p><b>Do you know your current pipeline value — without looking it up?</b> <i>If the number isn't top of mind, it's not being managed.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
<p><b>Does your pipeline include deals you didn't personally source?</b> <i>If every deal traces back to you, the system isn't working yet.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure

<p><b>What does your revenue look like over the last 3 years?</b> <i>Write in approximate annual revenue for each year — even rough numbers help.</i></p>	
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## SECTION 2 — Sales Process

<p><b>Do you have a documented sales process — even a simple one?</b> <i>Documented = written down somewhere a new hire could actually follow.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
<p><b>Could a new rep follow your sales process without you in the room?</b> <i>If not, the process lives in your head — not in your business.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
<p><b>Do you have defined criteria for qualifying or disqualifying a prospect?</b> <i>Knowing who NOT to pursue is as valuable as knowing who to chase.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
<p><b>Is your follow-up process consistent and documented?</b> <i>Or does it depend on who's doing the follow-up that week?</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure



**Where do deals most often stall or fall apart in your process?**

*Discovery? Proposal? Follow-up? Be specific — this is your highest-leverage fix.*

**SECTION 3 — People & Accountability**

<p><b>Is someone besides you accountable for hitting a revenue number?</b> <i>If the answer is no, you're still the only salesperson.</i></p>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	<input type="checkbox"/> <b>Unsure</b>
<p><b>Does your sales rep (if you have one) have a clear quota and ramp plan?</b> <i>A rep without a number and a timeline has no real accountability.</i></p>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	<input type="checkbox"/> <b>Unsure</b>
<p><b>Do you have a weekly sales check-in or pipeline review?</b> <i>Even 30 minutes. Deals that aren't reviewed weekly fall through the cracks.</i></p>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	<input type="checkbox"/> <b>Unsure</b>
<p><b>Is anyone coaching or developing your sales function right now?</b> <i>A trusted outside perspective often sees what you've stopped seeing.</i></p>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	<input type="checkbox"/> <b>Unsure</b>

**Who owns pipeline generation in your business today?**  
*Name the person (or be honest that it's still just you).*

**SECTION 4 — Growth Readiness**

<p><b>Do you have a plan to grow revenue in the next 12 months — with specific actions?</b> <i>A goal without actions is a wish.</i></p>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	<input type="checkbox"/> <b>Unsure</b>
<p><b>Could your business generate revenue for 2 weeks without you involved in a deal?</b> <i>This is the independence test. Most founder-led businesses fail it.</i></p>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	<input type="checkbox"/> <b>Unsure</b>
<p><b>Are you planning to exit or sell the business in the next 3–5 years?</b> <i>If yes, your sales system is your most important valuation driver.</i></p>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	<input type="checkbox"/> <b>Unsure</b>

**What is the single biggest thing holding your revenue back right now?**  
*Write whatever comes to mind first — gut answers are usually the right ones.*



## How to Read Your Results

<b>Mostly YES</b>	Your foundation is stronger than most. Focus on refining your pipeline process and coaching structure — you're closer to scaling than you think.
<b>Mixed</b>	You have real gaps — and they're likely the direct cause of your plateau. The good news: you know where to start. Prioritize process and accountability first.
<b>Mostly NO</b>	Your sales function needs to be built, not tweaked. That's not a judgment — it's a starting point. The sooner you build the foundation, the sooner revenue moves.

### Ready to talk through what you found?

Sales Homie works with founders to diagnose exactly what's stalling their revenue — and build the system to get past it. No fluff, no generic playbooks. Just real sales strategy built around your business.

[www.saleshomie.com](http://www.saleshomie.com) | [contact@saleshomie.com](mailto:contact@saleshomie.com)