RS-T01 / SELF-ASSESSMENT

GTM & Sales Motion Assessment

Find the constraint in your sales motion before you fix the wrong thing.

BUILT FOR
Founders & Revenue Leaders, Sales Managers

STAGE
Build, Improve

YOU LEAVE WITH
One named constraint and a 30-day plan

INSIDE

01 Understand
02 Apply
03 Learn
04 Evaluate
05 Go further

Most teams fix the loudest problem, not the real one.

When revenue stalls, the first instinct is usually more leads, a new hire, or a new tool. Often the real constraint sits somewhere else in the motion. This assessment helps you find it in under an hour.

THE PROBLEM

Effort goes into the most visible symptom while the actual bottleneck keeps limiting results.

WHO IT'S FOR

Founders, revenue leaders, and sales managers who own a number and the system that produces it.

WHEN TO USE IT

Before planning a quarter, making a hire, buying a tool, or when growth flattens without an obvious cause.

The six parts of a sales motion

A sales motion works like a chain: output is limited by its weakest part, so improving a strong part rarely moves the number. We look at six parts, in the order revenue flows through them.

01
Target
Who you sell to, and who you don't.

02
Message
Why a buyer should care, in their words.

03
Pipeline
How qualified opportunities get created.

04
Deal execution
How opportunities move from first call to signature.

05
Team & coaching
Who does what, and how they get better.

06
Operating rhythm
How you inspect, forecast, and decide.

HOW THE SCORING WORKS

Each part has four statements. Score each one from 1 to 4 based on evidence from the last 90 days, not on intent or plans.

1 Not true | **2** Partly or sometimes | **3** Mostly true | **4** True, and we can show it

How to run it

1. **Pick a window.** Use the last 90 days. Pull your CRM pipeline report and your last ten won and lost deals.
2. **Rate independently.** Have two or three people who touch the motion (for example a founder, a manager, and a seller) score separately before comparing.
3. **Compare and discuss gaps.** Where scores differ by two or more points, talk it through. The disagreement is often the finding.

Rate each part.

Circle a score for each statement. Write the evidence next to every 3 or 4. No evidence means a 2.

01 Target Who you sell to, and who you don't.

Part score _____ / 16

#	STATEMENT	SCORE	EVIDENCE (WHAT PROVES IT)
1.1	We can describe our ideal customer in one sentence a new hire could repeat.	1 2 3 4	
1.2	Most of our last ten wins fit that description.	1 2 3 4	
1.3	We have written criteria for accounts we will not pursue.	1 2 3 4	
1.4	We know roughly how many accounts fit, and which ones we are working.	1 2 3 4	

02 Message Why a buyer should care, in their words.

Part score _____ / 16

#	STATEMENT	SCORE	EVIDENCE (WHAT PROVES IT)
2.1	We lead with the buyer's problem, not our feature list.	1 2 3 4	
2.2	Two of our sellers would describe our value in similar words.	1 2 3 4	
2.3	We can name the alternatives buyers weigh, including doing nothing, and why they choose us.	1 2 3 4	
2.4	Our message changes by persona where their jobs differ.	1 2 3 4	

03 Pipeline How qualified opportunities get created.

Part score _____ / 16

#	STATEMENT	SCORE	EVIDENCE (WHAT PROVES IT)
3.1	We know which sources produced our last ten qualified opportunities.	1 2 3 4	
3.2	Each owner has a weekly pipeline-creation target and tracks it.	1 2 3 4	
3.3	At least one source works without heroics from a founder or one top seller.	1 2 3 4	
3.4	We create enough new pipeline each month to cover next quarter's target.	1 2 3 4	

04 Deal execution

How opportunities move from first call to signature.

Part score _____ / 16

#	STATEMENT	SCORE	EVIDENCE (WHAT PROVES IT)
4.1	Each stage has written exit criteria based on what the buyer has done.	1 2 3 4	
4.2	Every active deal has a dated next step the buyer agreed to.	1 2 3 4	
4.3	We know the decision process and the economic buyer before we send a proposal.	1 2 3 4	
4.4	We review lost deals and record a specific, honest reason.	1 2 3 4	

05 Team & coaching

Who does what, and how they get better.

Part score _____ / 16

#	STATEMENT	SCORE	EVIDENCE (WHAT PROVES IT)
5.1	Roles and handoffs between stages are written down and followed.	1 2 3 4	
5.2	Managers coach from real calls (recorded or live) at least every two weeks.	1 2 3 4	
5.3	New sellers follow a ramp plan with defined milestones.	1 2 3 4	
5.4	Each seller knows the one skill they are working on this quarter.	1 2 3 4	

06 Operating rhythm

How you inspect, forecast, and decide.

Part score _____ / 16

#	STATEMENT	SCORE	EVIDENCE (WHAT PROVES IT)
6.1	We run a weekly pipeline review with the same format every week.	1 2 3 4	
6.2	Forecast categories have definitions everyone uses the same way.	1 2 3 4	
6.3	CRM data answers basic questions without a spreadsheet hunt.	1 2 3 4	
6.4	We track a few leading indicators, not only closed revenue.	1 2 3 4	

Read your profile.

Add up each part out of 16, then shade one box per point. The shape of the chart matters more than the total.

PART	SHADE ONE BOX PER POINT	SCORE
Target		/16
Message		/16
Pipeline		/16
Deal execution		/16
Team & coaching		/16
Operating rhythm		/16

SCORE	BAND	WHAT IT USUALLY MEANS
4 to 7	**Constraint**	This part is limiting results. Start here.
8 to 11	**Inconsistent**	Works for some people or some deals, not reliably.
12 to 14	**Working**	Solid. Protect it; tune it later.
15 to 16	**Strength**	Build on it, and check the evidence is real.

Common profiles

IF YOUR CHART SHOWS	IT OFTEN MEANS	LOOK AT FIRST
Strong pipeline, weak deal execution	Plenty of volume, low conversion. Deals stall after the first meeting or demo.	Stage exit criteria and dated next steps
Weak target, everything else average	Effort spread across accounts that rarely buy. Every downstream number suffers.	Your ideal customer and disqualifiers
Strong deals, weak pipeline	The team closes well but starts each quarter short.	One repeatable source with weekly targets
Weak operating rhythm	Results are hard to explain, so decisions rest on opinion.	A weekly review format and forecast definitions

Where to start.

Pick one constraint. Fixing three things at once usually means fixing none of them.

THE RULE

Start with the **lowest-scoring part**. If two parts tie, start with the one earlier in the chain (Target comes before Message, Message before Pipeline, and so on), because upstream problems distort everything downstream.

First moves by part

IF THE CONSTRAINT IS	A GOOD FIRST MOVE	RELATED TOOL
Target	Write a one-sentence ideal customer and five disqualifiers. Re-tier your current pipeline against them.	ICP & Account Prioritization Workbook
Message	Rewrite your opening around the buyer's problem and test it on five live conversations.	Sales Message & Pitch Builder
Pipeline	Choose one source, set a weekly target per owner, and review it every Monday.	ICP & Account Prioritization Workbook
Deal execution	Define exit criteria for each stage and require a dated, buyer-agreed next step on every deal.	Discovery Call Playbook
Team & coaching	Set a two-week call-review cadence with one skill focus per seller.	Discovery Call Playbook
Operating rhythm	Fix one weekly review format and write definitions for each forecast category.	Pipeline Health Scorecard

Your 30-day focus plan

ITEM	YOUR ANSWER
The constraint	
The symptom we see	
The one change we will make	
How we will know it worked	
Re-score date (60 to 90 days out)	

03 LEARN

A worked example, and what to avoid.

> **EXAMPLE**
>
> A B2B SaaS team with six sellers and one manager. Three people scored independently, then agreed on: Target 13, Message 11, Pipeline 14, Deal execution 7, Team & coaching 9, Operating rhythm 10.
>
> **Reading:** pipeline is healthy, but deals stall after the demo. Lost-deal notes mostly say "timing" or "went dark."
>
> **Constraint:** Deal execution. **First move:** write exit criteria for each stage and make a dated, buyer-agreed next step a requirement to stay in the forecast. **Measure:** share of active deals with a dated next step, weekly.

Common mistakes

- **Scoring intent.** "We're rolling out a new process" is a 2 until it is happening.
- **Averaging away disagreement.** If one person scores 4 and another 1, the gap is the finding. Discuss it.
- **Fixing the strongest part.** It feels productive and rarely moves the number.
- **Never re-scoring.** Once a constraint is fixed, a new one becomes the limit. That is progress.

04 EVALUATE

Check your work.

- [ ] At least two people scored independently before comparing.
- [ ] Every 3 or 4 has written evidence next to it.
- [ ] Gaps of two or more points were discussed, not averaged.
- [ ] One constraint is named, using the lowest-score rule.
- [ ] There is one change, one owner, and one measure.
- [ ] A re-score date is in the calendar.

05 GO FURTHER

REVENUE DIAGNOSTIC

Want to work through this on a live deal?

The assessment shows where to look. In a Revenue Diagnostic we test your scores against your real pipeline, calls, and deal history, then agree on the first fix with you.

Book a strategy call: cal.com/revseries/strategy-call

Prefer email? advisor@revseriesadvisory.com