

The Strategic CRM Audit

A deep dive into the revenue opportunity, pipeline health, and operational hygiene already hiding inside your CRM or ERP. Delivered through your Sales Xceleration advisor and powered by KnowledgeNet AI Engage™, it turns the insight you already own into a clear plan for consistent revenue. **We turn around underperforming sales, starting with your own data.**

30+ pages

Executive-grade PDF deliverable, ready to walk through with your leadership team.

~5 days

From order to delivery, with zero engineering work on your side.

\$5,000

Flat fee, ordered through your Sales Xceleration advisor.

SOC 2 Type II

Audited controls. Your data is encrypted, never trained on, and deleted after delivery.

01 Where we find the money

Every CRM is different, so your audit isolates the revenue pools that actually exist in yours. We don't invent demand, we surface the names, score them, and size the opportunity with conservative benchmarks. Common examples of what we uncover:

EXAMPLE

Customer Expansion & Reorders

Existing customers who bought once, or who have gone dormant, and were never pitched again. Each is a foothold for a reorder, cross-sell, or share-of-wallet play.

Per-account whitespace map of what they bought versus what they haven't.

EXAMPLE

Unworked Inbound

High-intent contacts who viewed multiple pages and submitted a form, but never received a sales touch. Ranked by intent and delivered as a working call list.

Conservative lead-to-customer conversion applied to your weighted average sale price.

EXAMPLE

Closed-Lost Recovery

Deals lost in the last 12 to 18 months, often for budget or timing reasons that no longer apply. Ranked by recency and original deal value.

Industry-benchmark reactivation rate applied to recoverable lost-deal value.

02 What you walk away with examples; exact contents are shaped by your data

- **Executive thesis & opportunity headline**, the numbers your CEO will quote at the next board meeting
- **Revenue trend analysis** with deal-by-deal attribution and a recurring-revenue floor
- **Pipeline health by stage**, win rate, conversion, and a stuck-deal disposition matrix
- **Per-rep activity scorecard** with single-point-of-failure analysis
- **Customer concentration risk** and top lifetime-revenue accounts
- **Top expansion & reorder targets**, each linked back to the live CRM record
- **Top closed-lost re-engagement targets** with budget-cycle timing notes
- **Top unworked inbound leads**, your call list for next week, named and scored
- **Speed-to-lead diagnostics** exposing SLA gaps that cost real pipeline
- **ICP snapshot** built from your top revenue accounts, ready for the SX ICP workshop
- **Data-hygiene scorecard** flagging the gaps that distort your forecast
- **A dual roadmap** of SX services and KnowledgeNet automation, each grounded in your data

03 How it works four steps, about five business days, zero engineering lift

STEP 01 Order

Your Sales Xceleration advisor orders the audit on your behalf. One short kickoff, no IT ticket.

STEP 02 Connect

You grant read-only access to your CRM or ERP. We map pipelines, stages, owners, products, and pricing.

STEP 03 Analyze

Our AI agents run scoring rubrics across intent, expansion, closed-lost recency, stuck deals, and hygiene.

STEP 04 Deliver

A 30+ page report, walked through live with you and your advisor. You keep the deliverable and the call lists.

04 Your roadmap after the audit two ways to act on every finding

The audit closes with a roadmap that pairs the people and process work your Sales Xceleration advisor delivers with the automation KnowledgeNet builds, each mapped to a finding in your data. Examples below are drawn from past engagements, not a fixed menu.

SALES XCELERATION SERVICES Fix the sales engine

- ▶ **Fractional Sales Leadership**
An outsourced VP of Sales to lead the team when the CEO has stepped back from day-to-day selling.
- ▶ **Sales Infrastructure**
Fix the CRM, stages, and process gaps the hygiene scorecard exposes, so the data can be trusted.
- ▶ **ICP Workshop**
Turn the audit's ICP snapshot into a defined ideal-customer profile that focuses the whole team.
- ▶ **Sales Playbook & Training**
Codify the winning motion and coach reps to run it, from prospecting through close.
- ▶ **Cross-Sell & Account Management**
Stand up the reorder and expansion programs the whitespace map points to.
- ▶ **KPIs & Rep Performance**
The SX Way scorecard, so A players and coaching gaps are clear.

KNOWLEDGENET AUTOMATION Agentic Systems & AI Engage™

- ▶ **Dormant-Account Activation Agent**
Wakes lapsed customers with context-aware, budget-cycle-timed reorder outreach.
- ▶ **Share-of-Wallet Expansion Agent**
Surfaces added decision-makers per account and drafts the natural next pitch.
- ▶ **Closed-Lost Re-Engagement Workflow**
Quarterly re-engagement drafts with prior deal context summarized.
- ▶ **Daily Call List & Speed-to-Lead**
Highest-intent contacts to the rep's inbox each morning, with SLA monitoring on new forms.
- ▶ **Buyer-Intent Radar**
Monitors funding, hiring, and leadership signals in your market, 6 to 12 months early.
- ▶ **Always-On CRM Bot**
Ask your data anything, from rep performance to custom dashboards, no admin delay.

05 Security & data handling

SOC 2 Type II audited

KnowledgeNet.ai has completed the AICPA SOC 2 Type II audit, covering security, availability, processing integrity, confidentiality, and privacy over a sustained period.

Never trained on

Your CRM data is never used to train AI models. The analysis runs in an isolated workspace scoped to your engagement only. No co-mingling, no shared embeddings.

Deleted on delivery

When the audit is delivered, your raw data is purged from our systems. You keep the deliverable, we keep nothing. A certificate of deletion is available on request.

Ready to see what's hiding in yours?

If you run a B2B sales motion with \$5M or more in revenue, two or more sellers, and real data in a CRM or ERP, you qualify. Any industry, any country. Ask your Sales Xceleration advisor to order your audit.

[START HERE](#)

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PREVIEW What your deliverable might look like. Illustrative excerpt from a recent engagement. Your numbers, names, and structure will differ.

EX Where the money is

Each engagement isolates the revenue pools that already exist in your CRM, with conservative sizing math your CFO will accept.

Three accessible revenue pools

Illustrative example



EX Top stuck deals disposition matrix

Deals sitting in stage too long, each scored, ranked, and given a recommended action your reps can run next week.

#	Deal • Account	Amount	Stage	Age	Action	Reason
01	Centennial Plains, Phase II Sample Account • West Region	\$95,000	First Mtg 10%	109d	Touch	Send status email this week
02	Stillwater District, Office Sample Account • Central Region	\$95,000	First Mtg 10%	104d	Touch	Send status email this week
03	Bayfield Consolidated, Build Sample Account • East Region	\$75,000	First Mtg 10%	223d	Restart	Big deal stalled, worth a touch
04	Echo Canyon District Sample Account • Mountain Region	\$75,000	Inbound 2%	430d	Restart	Big deal stalled, worth a touch
05	Willowcreek Public Sample Account • West Region	\$75,000	Inbound 2%	843d	Close-Lost	Over 2 yrs, definitionally dead
06	Twin Falls Schools Sample Account • West Region	\$60,000	Inbound 2%	511d	Restart	Big deal stalled, worth a touch
07	Avalon High, Innovation Sample Account • East Region	\$60,000	Qualified 5%	909d	Close-Lost	Owner unassigned, stale
08	Westridge Public Schools Sample Account • Central Region	\$45,000	Qualified 5%	224d	Touch	Owner active, still warm

... 12 MORE ROWS IN FULL DELIVERABLE ...

PREVIEW One more excerpt. Pipeline diagnostics and named expansion targets. Every row links back to the live CRM record in your delivered version.

EX Pipeline health by stage

Stage-by-stage conversion versus benchmark. Drop-offs are flagged with recommended fixes.



HEADLINE FINDING

\$1.03M

in surfaced opportunity

Across three pools, customer expansion, unworked inbound, and closed-lost recovery, independent of any new ad spend, list purchase, or headcount. Numbers shown are illustrative.

EX Top expansion targets

Customers who bought once and were never pitched again, ranked by spend, recency, and open whitespace.

#	Account	Orig \$	Age
01	Westridge, Lockheed Single contact · active owner	\$86k	9 mo
02	Westridge, Upsell Single contact · active owner	\$66k	9 mo
03	Stillwater, 3D Printers Single contact · active owner	\$96k	12 mo
04	St. Bartholomew School Owner inactive · needs reassign	\$36k	8 mo
05	Pineview / Westside Unassigned · 1 contact	\$28k	9 mo
06	Brookfield Township Grant cycle approaching	\$25k	5 mo
07	Hamlet Co., TG Carts (7) Multi-unit · active owner	\$58k	20 mo

... 13 MORE ...