

The GTM Systems Audit Checklist

A structured, evidence-led review of the processes, data, technology, and reporting that power go-to-market execution.

01 INSPECT

Map the current state and evidence.

02 VERIFY

Test the paths, controls, and ownership.

03 PRIORITIZE

Turn findings into focused action.

Establish operating reality

Define the intended operating process before reviewing the tools. Establish the end-to-end flow, roles, inputs, outputs, and hand-offs that move work from intake to delivery. Agree the decisions to be supported, the cadence of execution and control, and the boundaries with adjacent functions. This clarity provides the benchmark for evidence, highlights gaps in ownership or data, and prevents tool-led design that does not fit how the business actually runs.



SCOPE Scope questions

Evidence / notes

☐	1. What is the end-to-end process from intake to delivery, including key steps and decision points?	
☐	2. Who performs each step, and what are their roles and responsibilities?	
☐	3. What are the critical inputs, sources of data, and information hand-offs?	
☐	4. What outputs or outcomes are produced, for whom, and how are they used?	
☐	5. What dependencies exist with other functions or processes?	
☐	6. What cadence, timing, and service level expectations govern the process?	

Example system map

(replace examples with your actual stack)

System / tool	Purpose / process	Critical data it owns	Sends / receives data	How failures are detected	Accountable owner
CRM (e.g., Salesforce)	Manages accounts, opportunities and customer interactions	Account records, contacts, opportunities, ownership	Sends leads to Marketing; receives active leads and engagement data	Daily sync error reports; missing records alerts	RevOps Manager
Marketing Automation (e.g., Marketo)	Runs campaigns, scores leads and nurtures prospects	Campaign activity; lead scores, engagement history	Sends qualified leads to CRM; receives unsubscribes and conversions	Campaign performance dashboards; bounce and engagement alerts	Demand Generation Manager
Billing Platform (e.g., Stripe)	Processes payments, subscriptions and invoicing	Customer billing data, payments, subscriptions, invoices	Sends payment status to CRM; receives customer and plan data	Payment failure notifications; conciliation reports	Finance Operations Lead
Data Warehouse (e.g., Snowflake)	Centralises and models data for reporting	Cleaned datasets, metrics, attribution data	Receives data from all systems; serves dashboards and exports	Data freshness checks; pipeline failure alerts	Data Engineering Lead



Before automating manual work

Map your systems. Know what data each system owns, how it connects, how failures show up and who is accountable. Automation without this clarity accelerates confusion.

CRM data and lifecycle handoffs

A. CRM data quality and governance



Checklist

- ☐ Do we have clear owners and definitions for lead status, source, and lifecycle stage?
- ☐ Are these fields consistently populated at every handoff?
- ☐ Do downstream reports and automations rely on these fields?

Field	Purpose / definition	Source of truth	Owner	Downstream use	Test / gap signal
Lead status	Current state of the lead in the funnel (e.g., New, Contacted, Qualified, Disqualified)	CRM system of record	RevOps (defined), Sales Ops (oversee)	Pipeline reporting, conversion analysis, SLAs	statuses used consistently; unmapped or ambiguous statuses
Original source	Where the lead originated (e.g., Website form, Webinar, Partner Referral)	Marketing automation or intake form	Marketing Ops	Source performance, campaign attribution	Blank or "Other" values; source changes post-conversion
Lifecycle stage	High-level stage across the buyer journey (e.g., MQL, SQL, Opportunity, Customer)	CRM (aligned with revenue process)	RevOps (defined), Sales Ops (oversee)	Handoff triggers, forecasting, customer analytics	Stage skipped or unclear; misaligned with defined process



Evidence to collect: Field dictionary, data dictionary or CRM schema, sample CRM records, lifecycle definitions.

CRM data and lifecycle handoffs

B. Lifecycle stages and handoffs

- ☐ Are lifecycle stages defined, documented, and communicated to all teams?
- ☐ Are entry and exit criteria for each stage measurable and consistently applied?
- ☐ Are handoffs between teams (e.g., marketing to sales) governed by clear rules?
- ☐ Are exception paths (e.g., disqualified, nurture) documented and actionable?

Stage / handoff	Entry / exit evidence	Owner	Exception / next state
Qualified lead	Lead score $\geq$ threshold, required fields complete, source = MQL	Marketing	If score < threshold $\rightarrow$ nurture
Sales accepted	Sales accepted date set, owner assigned, follow-up activity logged	Sales	If not accepted in SLA $\rightarrow$ reassign or escalate
Opportunity created	Opportunity record created, amount populated, stage = discovery	Sales	If incomplete $\rightarrow$ return to qualified lead



Evidence to retain: sampled record IDs, property history, agreed stage definitions, handoff rules, and documented exception cases.

Workflows and integrations

A. Automation and workflow reliability

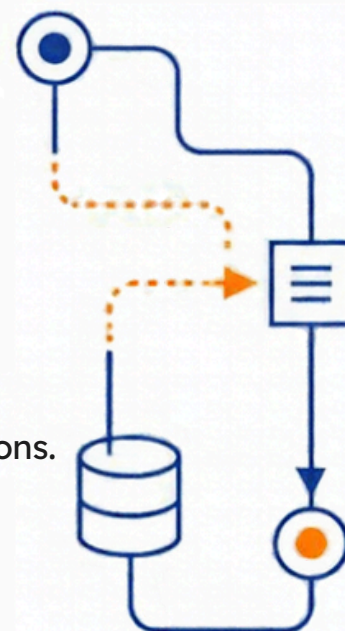
- ☐ List critical workflows, business outcome, trigger, owner, dependencies, and downstream actions.
- ☐ Review enrollment, exclusions, re-enrollment, timing, suppression rules, and conflicting automations.
- ☐ Validate the business outcome—not simply whether the workflow is enabled or its actions appear correctly configured.
- ☐ Test missing, late, invalid, changed, and duplicate data; verify alerts and recovery ownership.

Workflow / purpose	Expected outcome	Test case	Example expected evidence
Assign qualified lead	Correct owner assigned and notified	Required territory value is blank	Fallback assignment or visible exception alert; execution history retained
Set lifecycle stage	Stage changes only when criteria are met	Qualification field changes after enrollment	Stage updates only under agreed transition rules
Sync CRM field to downstream tool	Correct value appears downstream	Sync fails due to invalid value or auth issue	Error is logged, owner alerted, correction/replay documented

Workflows & Integrations

B. Integrations and data flow

- ☐ Define source of truth and permitted writers.
- ☐ Trace representative records across connected systems and compare record IDs, field values, timestamps, and associations.
- ☐ Check mappings, data types, value translation, latency, conflicting updates, and overwrite behavior.
- ☐ Confirm how failed syncs are assigned, corrected, reprocessed, and verified downstream.



Critical field	Authoritative source	Other writers / destinations	Conflict rule	Failure recovery
Lifecycle stage Example: Lead, MQL, SQL, Customer Caveat: Downstream reports and routing rely on consistency.		Marketing automation, Sales tools, Data warehouse	Other systems update via sync.	Failures assigned to Operations. Reprocess integration. Verify in downstream systems.
Campaign source / UTM Example: utm_source, utmmedium, utmCampaign Caveat: First-touch vs. last-touch definitions must be consistent.	Marketing automation	CRM, Analytics, Attribution tool	First write wins within attribution window. Do not overwrite with blanks.	Failures assigned to Marketing Ops. Correct source event. Verify attribution and reports.
Example: Named rep or team Caveat: Impacts routing, SLAs, and credit.		Routing engine, Territory tool, Sales tools	Routing can change only if no manual owner.	Failures assigned to Sales Ops. Reprocess routing. Verify assignment and SLAs.

A. Attribution and reporting

- ☐ Document metric definitions, filters, date field/window, source, and owner.
- ☐ Test UTMs through redirects and landing pages.
- ☐ Report sourced pipeline separately from influenced pipeline.
- ☐ Reconcile selected records only after checking data grain, identity, timing, consent, filters, and attribution logic.

Metric / field	Definition to document	Source / date basis	Example validation
Sourced pipeline	Pipeline credited to an agreed original/source campaign rule	CRM opportunity + documented attribution model; define date field	Trace one opportunity to the source evidence and rule
Influenced pipeline	Pipeline meeting an agreed influence/engagement rule; not equivalent to sourced	CRM campaign associations / engagement evidence; define window	Check qualifying touch and influence window
UTM campaign	Campaign parameter from tagged link; document naming convention and overwrite rules	URL → redirect → landing page → analytics → CRM capture	Test a known URL and inspect each step
Traffic / conversion totals	Define event/session/user/conversion grain and filters	Analytics platform and report date range	Explain expected differences before calling them defects

Important: CRM and analytics totals can differ for legitimate reasons.

Differences may result from identity resolution, consent, event definitions, time zones, attribution models, filters, and reporting grain. Do not classify every mismatch as a defect before validating definitions and collection methods.

B. Technology stack efficiency and ownership

11. Inventory tool purpose, business owner, administrator, and critical dependencies.
22. Review usage, adoption, business value, and manual workarounds.
33. Investigate overlap without assuming waste, and identify root causes.
44. Identify manual work and root cause before recommending replacement or consolidation.

Tool	Purpose / owner	Usage or value evidence	Overlap / dependency	Initial decision
CRM	System of record for agreed customer and pipeline fields / RevOps	Active usage, record quality, reporting adoption	Connected to automation and reporting	Keep; validate governance and field ownership
Marketing automation	Nurture, campaign execution / Marketing Ops	Campaign adoption, deliverability, workflow outcomes	Shares selected fields with CRM	Keep if purpose is distinct; fix mapping/ownership gaps
Integration platform	Moves data between systems / Integration owner	Successful runs, error rate, manual recovery time	May overlap with native connectors	Compare reliability and total operating effort before deciding

Statuses and finding log

A status describes what the evidence supports for the scope tested. Missing evidence is not proof of failure.

Status definitions

Status	When to use it	Evidence needed	Next step
VERIFIED	Evidence shows the process works as intended for tested cases and scope.	Record/report/configuration or repeatable test showing expected behavior; record sample and date.	Document evidence and monitoring control.
NEEDS ATTENTION	Evidence demonstrates a gap, inconsistency, or failure.	Specific record, log, report, failed test, or reproducible example; describe observed vs expected behavior.	Record impact, owner, corrective action, and success check.
UNKNOWN	Evidence is missing, incomplete, inaccessible, or inconclusive.	Explicitly state what was unavailable and what test/evidence would resolve it.	Assign evidence request or test; do not count as confirmed failure.

Illustrative finding

Finding ID	Audit area	Finding / question	Evidence	Assumption / open question	Business impact	Status	Owner / next step
F-001	Lead routing	Some inbound leads have no assigned owner	Sample of 20 leads: 3 had blank owner; record IDs and timestamps logged	Need to confirm whether these records should meet routing criteria	Potential delay in sales follow-up	Needs attention	RevOps: test fallback rule; alert owner; retest sample

Prioritization

Prioritize findings by evidence strength

Prioritize findings by evidence strength (multiple sources acceptable), business impact (revenue, margin, risk, customer experience), urgency (time sensitivity and opportunity window), scope (S / M / L planning labels—Small = localized and low complexity, Medium = cross-functional or multi-workstream, Large = enterprise-wide or multi-region), dependencies (what must move first), effort (relative level), owner (accountable role), and success check (how improvement will be verified). Use **S / M / L** as **planning labels only**, not industry benchmarks.



Consideration	What to record	Illustrative example
 Evidence	Summarize sources and key signals.	CRM reports, customer interviews, win / loss data, product usage.
 Business impact	Describe the impact if unaddressed.	Limits new logo growth, increases churn risk, adds cost to operations.
 Urgency	State timing sensitivity and window.	Q4 pipeline build, renewal season, competitive deadline.
 Scope	Label as S / M / L and describe boundaries.	S = one team or process area. M = multiple teams or workstreams. L = enterprise-wide or multi-region.
 Dependencies	List what must move first.	Data model changes, policy approvals, technology enablement.
 Effort	Estimate relative effort level.	Low, Medium, or High.
 Owner	Identify accountable role.	e.g., VP Sales, RevOps Leader, Marketing Director.
 Success check	Define how improvement will be verified.	e.g., uplift in conversion rate, reduced cycle time, higher adoption.

Top-three priorities

Use this page to focus the audit on the issues that require the clearest ownership and follow-through.

Priority	Finding ID / issue	Urgency	Dependencies	Owner / due date	Measurable success check
1	F-001: unassigned inbound leads	High—verify internal SLA	Confirm fallback rule	RevOps -----	10/10 test leads assigned or exception-alerted
2	----- -----	----- -----	----- -----	----- -----	
3	----- -----	----- -----	----- -----	----- -----	

Blank rows are reserved for additional priorities, owners, due dates, and success checks.

Suggested 30-day pace and close

Treat this as a suggested sequence, not a delivery guarantee. Actual timing depends on architecture, vendor dependencies, migration complexity, approval cycles, and team capacity.

Window	Focus	Actions	Output
Days 1–7	Establish baseline	Select critical journey; agree metric/stage definitions; map systems, field owners, and evidence sources.	Scope, system map, initial finding log
Days 8–14	Validate findings	Sample records; test normal and exception paths; review logs; confirm root causes; separate defects from expected differences.	Evidence-backed findings and open questions
Days 15–21	Address priorities	Assign owners; resolve dependencies; implement scoped changes; test changes and prepare rollback/escalation path.	Changes, test cases, success checks
Days 22–30	Retest and prevent recurrence	Repeat original tests; run regression checks for dependent workflows, integrations, and reports; confirm alerts and monitoring.	Retest evidence, updated runbooks, monitoring plan

Close-out checklist

- ☐ All critical and high-priority findings have documented owners and next steps.
- ☐ Original cases have been retested, including regression checks for dependent workflows, integrations, and reports.
- ☐ Configurations, integrations, and data quality controls are documented and monitored.
- ☐ Runbooks, documentation, and training are updated for the teams who operate the process.
- ☐ Stakeholders have reviewed results and approved the remaining risk or work.
- ☐ Continuous improvement cadence is scheduled and assigned.