

# The Revenue Efficiency Pyramid:

Example review points for organizational maturity assessment based on outcomes



	Convert More Inbound Leads	Convert More Outbound Prospects	Convert More Pipeline to Revenue	Maximize Net Revenue Retention
Fundamentals	<ul style="list-style-type: none"> <li>ICP/Personas/Products defined</li> <li>Pain points, value props outlined</li> <li>Go-to-market motions are defined</li> <li>Basic lead attribution are established</li> </ul>	<ul style="list-style-type: none"> <li>ICP/Personas/Products defined</li> <li>Capacity and Territory Planning</li> <li>Building and segmenting target lists</li> <li>Simplified outbound activity tracking</li> </ul>	<ul style="list-style-type: none"> <li>ICP/Personas/Products defined</li> <li>Sales methodology &amp; process set</li> <li>Sales comp structure is established</li> <li>Process is implemented into the CRM</li> </ul>	<ul style="list-style-type: none"> <li>ICP/Personas/Products defined</li> <li>Sales handoff + onboarding process</li> <li>Retention and expansion process</li> <li>Basic retention metrics defined</li> </ul>
Adoption	<ul style="list-style-type: none"> <li>MQL definitions per ICP defined</li> <li>Basic marketing nurture system</li> <li>Lead to customer journey mapped</li> <li>Paid program insights incorporated</li> </ul>	<ul style="list-style-type: none"> <li>Building out cadences</li> <li>Enablement and training</li> <li>Full reporting and dashboards</li> <li>Messaging for verticals and personas</li> </ul>	<ul style="list-style-type: none"> <li>Enablement and training</li> <li>Pipeline metrics reporting</li> <li>Pipeline inspection process</li> <li>1:1 sales coaching cadences</li> </ul>	<ul style="list-style-type: none"> <li>Creation of risk signals</li> <li>Renewal process adopted</li> <li>Net retention strategy adopted</li> <li>Customer cadences established</li> </ul>
Optimization	<ul style="list-style-type: none"> <li>Optimize for target account leads</li> <li>Optimized cost per lead and oppty</li> <li>Multi-touch attribution introduced</li> <li>Increase marketing personalization</li> </ul>	<ul style="list-style-type: none"> <li>Social prospecting optimized</li> <li>Incorporate intent into targeting</li> <li>ABM implemented with marketing</li> <li>Objection handling process established</li> </ul>	<ul style="list-style-type: none"> <li>Pipeline council established</li> <li>Proactive risk signals in deals</li> <li>Optimized conversation intelligence</li> <li>Regular sales forecasting conducted</li> </ul>	<ul style="list-style-type: none"> <li>Plays for customer turnover</li> <li>White space analysis optimized</li> <li>Integrated customer journey data</li> <li>Partner with sales to optimize NRR</li> </ul>
Automation	<ul style="list-style-type: none"> <li>AI-driven attribution</li> <li>Automated lead journey</li> <li>AI-assisted lead management</li> <li>Data-backed program decisions</li> </ul>	<ul style="list-style-type: none"> <li>Develop prospecting benchmarks</li> <li>Automate trigger-based cadences</li> <li>Using AI for outbound messaging scale</li> <li>Demand generation trends to forecast</li> </ul>	<ul style="list-style-type: none"> <li>Automated forecasting</li> <li>Referral program automation</li> <li>Automated signal-based selling</li> <li>AI-driven conversation intelligence</li> </ul>	<ul style="list-style-type: none"> <li>Automated health scoring</li> <li>Proactive risk notifications</li> <li>AI-assisted playbooks for CSMs</li> <li>Automated champion playbooks</li> </ul>