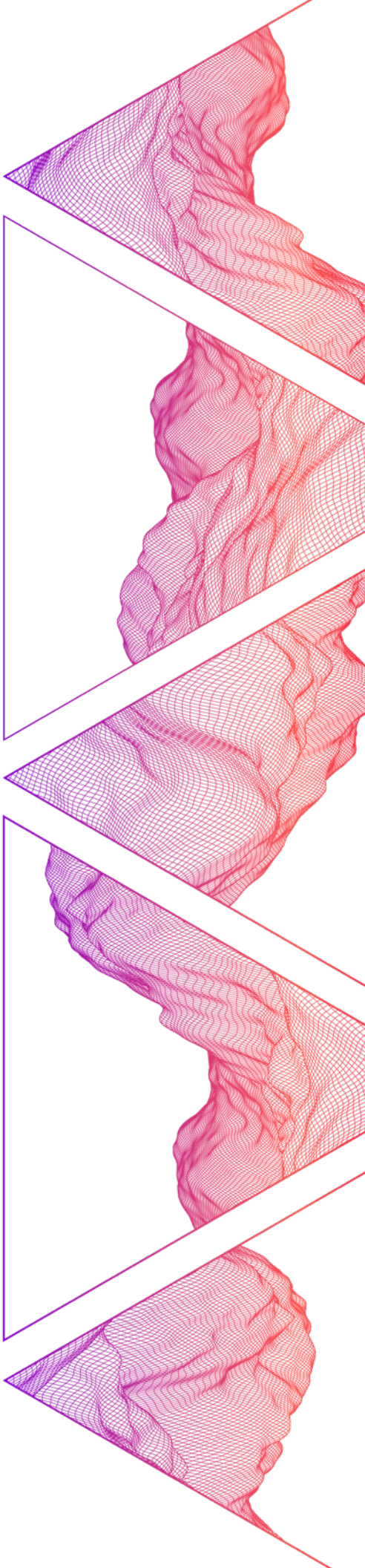
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The Revenue Intelligence Audit

Five checks to see whether reporting supports better growth decisions



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Why run this audit?

Marketing leaders need to understand how investment contributes to qualified opportunities, pipeline and revenue. Gartner reported average marketing budgets of 7.8% of company revenue in 2026. In separate ANA research, only 39% of surveyed B2B marketing leaders said they were confident measuring marketing's financial impact.

Neither figure proves that a particular budget will be cut. Together, they underscore the need for reporting that helps leaders decide what to fund, improve or stop. This audit helps marketing, sales and RevOps identify the most useful next improvement.

How to use the checklist

- Review your actual reports in one working session.
- Give each check 0, 1 or 2 points using the descriptions provided.
- If evidence falls between levels, use the lower score.

Total possible: 10 points



CHECK 1

Connect activity to business outcomes

Do your reports show how marketing contributes to pipeline and revenue, alongside activity and leading indicators?

0	☐	Reports focus on traffic, inquiries, form fills or cost per lead without a reliable pipeline view.
1	☐	Pipeline or opportunity measures appear, but they are not consistently used to guide investment decisions.
2	☐	Leaders review qualified opportunities, pipeline, win rates and revenue alongside relevant leading indicators with clear attribution limitations.

Score a 0 or 1?

Add one opportunity or pipeline measure to the next leadership review.

Keep existing activity measures as useful diagnostics, not the entire success story.

CHECK 2

See the buying group

Can your reporting connect engagement across priority accounts and buying-group roles?

0	☐	Contacts are tracked mainly as individual leads, with inconsistent links to accounts.
1	☐	Contacts are mapped to accounts, but role coverage and buying-group engagement remain unclear.
2	☐	Reports show meaningful engagement at account level and identify known buying-group roles, while acknowledging unidentified stakeholders.

Score a 0 or 1?

Start with priority accounts. Improve contact-to-account matching and capture known roles without assuming you can observe the entire committee.

CHECK 3

Understand the blind spots

Does the team recognize what attribution misses and collect additional buyer context?

0	☐	The team treats tracked interactions as the complete journey and rarely asks buyers about discovery.
1	☐	Buyer-reported sources or qualitative insights are collected inconsistently or not analyzed alongside tracking.
2	☐	The team reviews tracked activity with buyer-reported sources, sales feedback and other relevant signals, and states what remains uncertain.

Score a 0 or 1?

Add an optional open-text "How did you hear about us?" prompt to relevant forms and early sales calls; record the responses consistently.

CHECK 4

Strengthen first-party data

Do the CRM, marketing automation and reporting systems use consistent account and opportunity definitions?

0	☐	Conflicting records or lifecycle definitions regularly undermine reporting.
1	☐	Key definitions exist, but teams still depend on manual reconciliations and inconsistent ownership.
2	☐	Shared definitions, named data owners and recurring quality checks support dependable account and opportunity reporting.

Score a 0 or 1?

Assign data ownership and agree on the definitions affecting your most-used pipeline reports before buying another tool.

CHECK 5

Make reporting actionable

Can marketing, sales and finance understand the evidence, limitations and decision coming out of each review?

0	☐	The method is undocumented or shifts between reporting cycles; decisions are unclear.
1	☐	The method is documented, but definitions, uncertainty or next decisions are not consistently agreed across teams.
2	☐	The review uses agreed definitions, distinguishes observed results from estimates and documents decisions and owners.

Score a 0 or 1?

Summarize your measurement method and its limitations on one page, then agree on the next investment decision and owner.

Read your results

Total score: ___ / 10

8–10

Strong foundation.

Your reporting supports useful investment discussions. Keep validating data and refining decisions.

5–7

Developing.

Parts of the system are useful, but at least one gap limits confidence or follow-through. Prioritize the lowest-scoring check.

0–4

Needs attention.

The current reporting may not yet provide a dependable basis for investment decisions. Begin with the most consequential gaps.

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Where to start

This is a practical self-assessment, not a validated predictor of revenue or shortlist outcomes. A low score identifies a reporting capability to improve, not proof that marketing is underperforming.

Start with the lowest-scoring check that affects an upcoming budget, pipeline or operational decision. If there is a tie, choose the gap with the clearest owner and highest decision impact. Revisit the checklist after the next reporting cycle.

Next step

Elevation helps B2B organizations connect marketing activity to business outcomes, improve data quality and create reporting that supports investment decisions.

Read the full Revenue Intelligence & Measurement guide
elevationb2b.com/blog/revenue-intelligence-measurement/

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