SMARTer Entrepreneurs

The Revenue System Self-Assessment

Fifteen minutes to find where your revenue system leaks

Most owners of consultancies, agencies and advisory firms can name their symptoms: not enough leads, revenue that can't be predicted, growth stalled at the edge of a personal network. Far fewer can name the constraint causing them, and that's the expensive gap, because effort aimed at the wrong stage is effort wasted.

This assessment scores your business across the eight stages of how expertise-led firms win and keep clients. It takes about fifteen minutes, and it works only if you answer honestly, from evidence rather than intention. Nobody sees your scores but you.

How to score

For each statement, score yourself from 1 to 5. A score of 1 means "not true of us at all"; 3 means "partly true, or true sometimes"; 5 means "consistently true, and I could show you the evidence". The evidence test matters: if you couldn't demonstrate it to a sceptical outsider, score it lower. Add the three scores in each stage for a stage total out of 15.

Stage 1: Strategic Targeting

1. We can describe our ideal client precisely: sector, size, situation, and the problem that makes them need us.   Score: ____

2. We chose our market deliberately; our client list reflects a decision, not an accumulation of whoever arrived.   Score: ____

3. When we describe who we serve, prospects in that group recognise themselves immediately.   Score: ____

Stage total: ____ / 15

Stage 2: Attract

1. The right kind of prospect encounters us regularly, through channels we run deliberately rather than by luck.   Score: ____

2. Our website and materials speak in our buyers' language, about their problems, not our methods.   Score: ____

3. New enquiries arrive most months without us having to scramble for them. Score: ____

Stage total: ____ / 15

Stage 3: Qualification

1. We have clear criteria for what makes an opportunity real, and we apply them before investing serious time. Score: ____

2. We regularly decline or walk away from poor-fit opportunities, early and without drama. Score: ____

3. We rarely write proposals for prospects who were never going to buy. Score: ____

Stage total: ____ / 15

Stage 4: Nurturing

1. Prospects who aren't ready yet hear from us usefully and regularly, without being pestered. Score: ____

2. We know, for each live prospect, what happens next and when. Score: ____

3. When a prospect finally becomes ready, we are usually still in the picture. Score: ____

Stage total: ____ / 15

Stage 5: Conversion

1. Before proposing, we understand the prospect's budget, decision process and definition of success. Score: ____

2. Our proposals confirm a decision that's already forming; they don't carry the whole burden of persuasion. Score: ____

3. We win a healthy share of the proposals we submit, and we know our actual rate. Score: ____

Stage total: ____ / 15

Stage 6: Retention

1. Clients experience deliberate attention between deliverables, not just at them. Score: ____

2. We review the relationship with key clients on a rhythm, not only when something's wrong. Score: ____

3. Clients rarely leave us for reasons we didn't see coming. Score: ____

Stage total: ____ / 15

Stage 7: Growth

1. We know which existing clients have more need we could serve, and we act on it deliberately. Score: ____

2. Revenue from existing clients grows through planned conversations, not accidental discoveries. Score: ____

3. Expanding an existing relationship is a comfortable conversation for us, not an awkward one. Score: ____

Stage total: ____ / 15

Stage 8: Advocacy

1. Referrals arrive because we make them easy, not just because clients are happy. Score: ____

2. We know when and how to ask for introductions, and we actually do it. Score: ____

3. Our best clients could describe who we're looking for, because we've told them. Score: ____

Stage total: ____ / 15

Reading your results

First, resist averaging. A revenue system is a chain, and chains fail at their weakest link; your total score matters far less than your lowest stage. That lowest stage is almost certainly your constraint, and it's where effort will pay back fastest, whatever you'd rather work on instead.

A stage scoring 12 to 15 is working; maintain it, don't rebuild it.

A stage scoring 8 to 11 is partial: something exists, but it isn't systematic. These stages improve quickly once given deliberate attention.

A stage scoring 3 to 7 is a leak. If it sits early in the chain (targeting, qualification), it's quietly undermining every stage after it.

Two patterns worth knowing. If everything scores mid-range, the business is running on effort and personality rather than system; the fix is to pick one stage and make it genuinely systematic before touching the next. And if the early stages score high but conversion or retention leak, be sceptical of your own generosity: most owners score targeting kindly because they can describe an ideal client, even when the client list says otherwise. Re-check against evidence.

What to do next

Take your lowest stage and give it ninety days of deliberate attention before anything else. The free tools at smarterentrepreneurs.co.uk are built for exactly this: the Qualification Scorecard if Stage 3 leaked, the Referral Engine Guide for Stage 8, the 90-Day Revenue Foundations Plan if several early stages need work.

And if a score surprised you, or you'd like a second pair of eyes on what it means for your business, that's what a Discovery Call is for. No pitch, no pressure, and you'll leave with something useful either way. Book at smarterentrepreneurs.co.uk.