

The AI Revenue Leak Checklist

Twelve questions across the six operating decisions.

Each question scores 0, 1, or 2. Zero means the step is controlled; two means it is leaking. Tick one box per question and add them up. The total, out of 24, lands you in one of the three bands at the foot of the page.

WHERE THE TOOLS LIVE

What should AI do? · What should go into the CRM?

01 Is there a written line for what AI and automation are allowed to do on their own, versus only prepare work for a person to finish?

- ☐ 0 Yes, written down ☐ 1 Understood, but not written ☐ 2 No, each tool decides for itself

02 Can you say what each tool in the revenue stack is responsible for?

- ☐ 0 Each tool has a defined job ☐ 1 Mostly, with some overlap ☐ 2 Jobs overlap and no one is sure

03 Do tool outputs, the drafts, enrichment, and call notes, enter the CRM as structured fields?

- ☐ 0 Yes, structured fields ☐ 1 Mixed ☐ 2 Pasted into notes, or not at all

WHERE THE WORKFLOW HANDS OFF

What should humans review? · What should not be automated?

04 When a tool drafts something customer-facing, does a named person approve it before it goes out?

- ☐ 0 Yes, a named person approves ☐ 1 Sometimes, no fixed rule ☐ 2 No, it goes out unchecked

05 When automation hits a case it was not built for, an unusual reply or a lead that fits no rule, does it route to a person?

- ☐ 0 Routes to a named person ☐ 1 Depends on the tool ☐ 2 We find out when something breaks

06 Have you decided on purpose which steps stay human?

- ☐ 0 Yes, decided and written down ☐ 1 Some, by habit not decision ☐ 2 No, automation reaches everything it can

WHERE THE REVENUE SHOULD SHOW UP

What should trigger follow-up? · What should go into the CRM?

07 Can your team see, in one place, which leads are waiting on follow-up right now?

- ☐ 0 Yes, one shared view ☐ 1 Scattered but findable ☐ 2 No, you would have to ask around

08 When a lead goes quiet, does a defined trigger bring it back to a person?

- ☐ 0 Yes, an automatic trigger ☐ 1 Sometimes, if noticed ☐ 2 No, it depends on someone remembering

09 Is there one agreed record where a deal's real status lives?

- ☐ 0 Yes, one shared record ☐ 1 Mostly, with gaps ☐ 2 No, it is spread across tools and inboxes

WHERE LEADERSHIP READS THE SCORE

What should leadership measure? · What should not be automated?

10 If leadership asked today for the return on the tool stack, how long would it take to produce the number?

- ☐ 0 Under an hour ☐ 1 A few days of pulling ☐ 2 We could not produce it

11 Do you know whether your tools added review or rework hours that did not exist six months ago?

- ☐ 0 Yes, we track it ☐ 1 We suspect, but have not measured ☐ 2 We have never looked

12 If a critical tool went down today, would the revenue motion still run?

- ☐ 0 Yes, it would keep running ☐ 1 Slowed but functional ☐ 2 No, it quietly depends on that tool

0-8 • Controlled

Mostly decided.

Re-run quarterly. Stacks drift.

9-16 • Leaking

Money through unmade decisions.

A Decision Sprint names the leaks and produces the plan.

17-24 • Exposed

The system is running you.

A Decision Sprint is the cheapest next step.

Scored Leaking or Exposed? Book a 15-minute fit call: thecrowdsignal.com/book-a-call. Three questions, no deck. I will tell you whether a Sprint fits, or whether you need something else first.

THE CROW'S SIGNAL • RELIABLE REVENUE SYSTEMS