

MSP REVENUE LEAK CHECKLIST:

A 5-MINUTE SCAN TO FIND
FRICTION BETWEEN SALES,
OPERATIONS, AND MARGIN



LEAK CHECK POINTS

Sales motion

01

Let's keep it simple:

- 1) Review the sections
- 2) Score your answer
- 3) Total you vales

Scoring:

Yes=2

Somewhat=1

NO=0

By Area:

<5 needs immediate attention

Total:

30-40 Tight Operations

20-29: Opportunity to improve

<20: Working hard than needed

02

Velocity

Sales>Ops Handoff

03

04

Process Friction

Margin Visiblity

05

Sales Motion

1. Are your discovery calls structured with clear outcomes?
2. Do you control the flow of the conversation, or react to it?
3. Are next steps defined before every call ends?
4. Do deals follow a consistent process—or vary rep to rep?

Velocity

1. Is your average time from discovery → quote consistent?
2. Do deals often stall after pricing is shared?
3. Is pricing delivered with context or just numbers?
4. Do you have a defined follow-up cadence?

Sales → Ops Handoff

1. Is there a standard handoff process?
2. Does delivery ever have “re-discover” requirements?
3. Are expectations clearly documented before kickoff?
4. Are projects starting clean—or with confusion?

Process Friction

1. Are there bottlenecks in quoting or approvals?
2. Are tools connected—or creating extra work?
3. Is anyone doing duplicate entry/manual work?
4. Do deals most commonly slow down at the same stage?

Margin Visibility

1. Do you know where margin is won or lost?
2. Are scope changes controlled—or reactive?
3. Are projects consistently hitting expected margins?
4. Do you review deal performance post-close?

NOW THAT YOU HAVE A SOLID IDEA OF WHERE YOU CAN TIGHTEN UP, ITS TIME TO TAKE ACTION AND IMPROVE THOSE AREAS.



WHAT'S NEXT?

I CAN HELP- I HAVE PROVEN ROI RESULTS OF 11X- BOASTING SIGNIFICANT IMPROVEMENTS IN OPERATIONS, INCREMENTAL REVENUE AND MARGIN

BOOK TIME WITH ME AND TELL ME WHERE YOU WANT TO START.

YOU CAN ALSO EMAIL ME  GREG@IAOCONSULT.COM



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