

Mir Meridian

Engagement Summary

Conduct a Revenue System Diagnostic over approximately three weeks to identify the root causes of pipeline, execution, and forecast breakdowns, and deliver a prioritized set of corrective actions.

- ☐ Scope: Revenue System Diagnostic
- ☐ Duration: ~3 weeks
- ☐ Total Investment: \$7500

Time Requirements

Over the course of the engagement, the client will allocate limited, structured time to support the diagnostic:

- ☐ **Diligence Requests:** 1–3 hours, depending on system and document accessibility.
- ☐ **Operations Review:** Assessment of the end-to-end revenue system, including CRM configuration, data integrity, integrations, and usage patterns to identify structural constraints on visibility, handoffs, and repeatability.
- ☐ **Interviews:**
 - One 45-minute interview with the executive sponsor.
 - 30-minute interviews with 1–2 individuals per role (sales leadership, managers, sellers, SDR/BDRs, operations, marketing, and customer success, where relevant).
 - A limited number of follow-up interviews may be requested to resolve gaps or contradictions.
- ☐ **Call Reviews:** Review of 10–30 recorded call transcripts across prospecting, discovery, and later-stage conversations.
- ☐ **Calendar Audit:** Review of sales team calendars to assess time allocation versus stated priorities.
- ☐ **Sales Skills Assessment:** All individual contributors complete a 20-minute multiple-choice assessment.
- ☐ **Findings Review:**
 - Optional 1-hour session to preview early findings
 - 1-hour executive review of the final diagnostic and recommendations

Preparation

Mir Meridian will work with the client to explicitly define:

- ☐ Areas in scope and out of scope for the diagnostic
- ☐ Executive sponsor and required stakeholders for interviews
- ☐ Systems, data sources, and documents required for review

This preparation step ensures focus, speed, and a bounded engagement.

Diligence

Mir Meridian will review materials and inputs from the initial document request to evaluate the health and coherence of the revenue system across four dimensions:

Mir Meridian

- ☐ **Strategy:** Target market definition, ICPs, personas, products, pricing, channels, and the metrics used to manage performance.
- ☐ **Systems:** Sales process design, pipeline math, sales methodologies, technology stack, CRM configuration and usage (management and field), handoffs, coaching mechanics, pipeline inspection, and playbooks.
- ☐ **Staff:** Organizational structure, hiring profile, onboarding, career paths, turnover patterns, and compensation design.
- ☐ **Skills:** Training coverage, certifications and re-certifications, product and feature readiness, call quality, performance versus goal, and skill variance across the team.

Each dimension is evaluated for internal consistency, execution risk, and impact on pipeline quality and forecast reliability.

Deliverables

- ☐ A concise summary of findings, root causes, and the specific factors limiting revenue performance and predictability.
- ☐ A live working session with the executive team to walk through conclusions, answer questions, and align on priority actions and sequencing.
- ☐ Recommendations on next steps.

Engagement Timeline

| Mir Meridian Activities | | | | | Client Inputs | | | | | Joint Sessions | | | | |
|-----------------------------|-----|---|---|---|---------------|---|---|---|---|----------------|----|----|----|----|
| | Day | | | | | | | | | | | | | |
| Activity | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| Kick-Off Meeting | | | | | | | | | | | | | | |
| Document Request | | | | | | | | | | | | | | |
| Client Send Docs* | | | | | | | | | | | | | | |
| Sales Skills Assessment | | | | | | | | | | | | | | |
| Revenue System Analysis | | | | | | | | | | | | | | |
| Stakeholder Interviews | | | | | | | | | | | | | | |
| Follow-Up Questions | | | | | | | | | | | | | | |
| Initial Diagnostic Findings | | | | | | | | | | | | | | |
| Final Clarifications | | | | | | | | | | | | | | |
| Final Executive Diagnostic | | | | | | | | | | | | | | |

Assumptions

- ☐ The target completion timeline for the engagement is approximately three (3) weeks and is dependent on timely access to client stakeholders, systems, and requested materials.
- ☐ Stakeholder interviews will be scheduled in consolidated time blocks, at mutually agreed times, to minimize disruption and maintain diagnostic momentum.
- ☐ All services will be delivered remotely.
- ☐ Mir Meridian will be granted reasonable access to relevant client personnel, systems, data, and documentation as required to complete the diagnostic.