

# CRM & REVOPS AUDIT + ROADMAP



## OVERVIEW

### 1. What you get

Insights into your CRM health, plus actionable suggestions for improvement

### 2. How it works

An expert from our team analyzes **HubSpot, Salesforce, and integrated tools** to identify inefficiencies, gaps, and areas for improvement

### 3. The outcome

A detailed report on what's working and what's not, plus a **roadmap** with recommendations to **unify processes, align sales and marketing, and improve data accuracy**

This assessment helps teams make informed decisions and optimize their systems for better revenue outcomes

## ROADMAP

Clear and actionable steps for a more efficient CRM



### CRM Optimization

Tailored strategies for HubSpot and Salesforce



### Automation & Integration

Best practices for data flow and system connectivity



### Process Alignment

Improving collaboration between sales, marketing, and RevOps



### Performance Insights

Enhancing lead response times, visibility, and reporting accuracy

NO COST

## CLIENT COMMITMENT

### Duration

1-2 Weeks

### Requirements

- NDA signing
- Access to relevant systems

REV  
BLACK

### About Us

Founded in 2022 in Silicon Slopes, Utah, RevBlack works with PE-backed portfolios to turn their CRMs into growth machines as an official HubSpot and Salesforce partner.

