

# Act as a coordinated AI revenue operations team for a fictional B2B SaaS company with 120 inbound leads per month, 30 unanswered leads, 18 m

## Executive Revenue Operations Result

Status: Planning only. All figures are fictional test inputs. No customers were contacted, meetings scheduled, CRM records changed, or automations activated.

## Diagnosis

- 30 unanswered leads = 25% response leakage.
- 18 missed follow-ups = 15% follow-up leakage.
- 12 demo requests awaiting scheduling = 10% scheduling leakage.
- The 30 and 18 records may overlap; affected leads must not be counted as 48 until deduplicated.
- At 15% conversion, 120 leads imply approximately 18 customers, but this is not verified cohort performance.

Primary control failures to investigate: unclear ownership, missing next-action dates, stale stages, incomplete qualification, consent gaps, and disconnected scheduling handoffs.

## Completed specialist work

- Prioritized high-intent demos and recent unanswered leads first.
- Defined qualification fields, pipeline stages, scheduling statuses, reminder procedures, handoffs, escalation rules, and KPIs.
- Drafted recovery messages for unanswered leads, missed follow-ups, demos, and final check-ins.
- Agreed that automation should initially use alert/task mode, not autonomous outreach.

## 30-Day Action Matrix

| Deadline | Action                             | Owner  | Dependencies / approval                | Success measure                  |
|----------|------------------------------------|--------|----------------------------------------|----------------------------------|
| Days 1-2 | Audit, deduplicate, segment all 60 | RevOps | Authoritative CRM, timestamps, consent | 100% audited; overlap documented |

|            |                                                               |                                    |                                                                |                                                                               |
|------------|---------------------------------------------------------------|------------------------------------|----------------------------------------------------------------|-------------------------------------------------------------------------------|
|            | listed records                                                |                                    |                                                                |                                                                               |
| Days 1-2   | Assign owners and flag high-intent/SLA-breached records       | RevOps ? Sales                     | Human review for missing ownership/consent                     | Every priority record has an owner                                            |
| Days 1-3   | Status-label all demo requests                                | RevOps + Scheduling                | Contact, consent, timezone, qualification data                 | 100% of 12 labeled                                                            |
| Days 3-5   | Complete qualification and next-step fields                   | Sales owners                       | Approved CRM updates                                           | 100% of schedulable records complete                                          |
| Days 3-10  | Conduct approved recovery outreach and scheduling             | SDR/Sales + Scheduling             | Explicit authorization, approved copy/channel, calendar access | ?90% of demos have a disposition                                              |
| Days 4-7   | Ensure owner, stage, and dated next action for priority leads | Sales Manager + RevOps             | CRM-write approval                                             | 100% of prioritized leads controlled                                          |
| Days 8-14  | Recover and re-qualify backlog                                | Sales                              | Consent and frequency checks                                   | Both backlogs reduced ?50%                                                    |
| Days 11-20 | Apply confirmation and reminder process to confirmed demos    | Authorized scheduling owner/system | Confirmed booking only                                         | 100% reminder status tracked                                                  |
| Days 15-21 | Review aging, sources, conversion, and handoff failures       | Sales Manager + RevOps             | Reliable pipeline data                                         | ?90% active opportunities current                                             |
| Days 21-30 | Process no-shows and exceptions                               | Sales owners                       | Human-reviewed recovery task                                   | 100% no-show tasks within one business day                                    |
| Days 22-30 | Establish daily exception review and weekly KPI reviews       | RevOps                             | Reporting access and definitions                               | Unanswered <10%; missed follow-ups <5%; scheduling backlog zero or documented |

## Escalation and controls

Escalate unclear consent/opt-outs, duplicate records, missing ownership, unavailable calendar data, complaints, sensitive matters, SLA breaches, or conflicting outreach. Required fields include owner, stage, use case, timeline, stakeholders, consent/channel, next action, and due date.

## Failures / unresolved items

No runtime execution occurred. Current CRM data, consent status, timestamps, stage history, calendar availability, and SLA policy remain unverified. External outreach, bookings, CRM writes, and automation activation require explicit authorization and approval.