

GROWTH · DIAGNOSTIC DELIVERABLE

# Sales Ops Diagnostic · Final Report

## SAMPLE

3-week diagnostic · funnel, SLA, automation, stack

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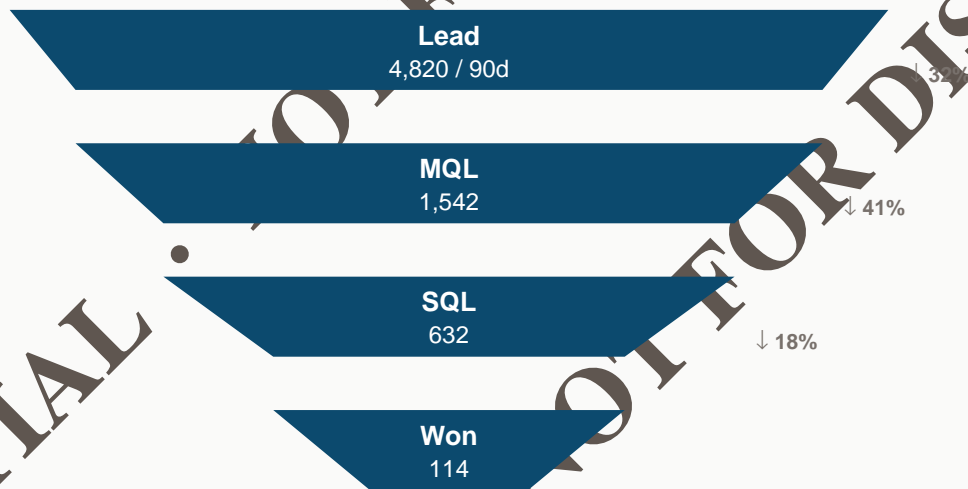
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FUNNEL MAP

## Stage conversion + dwell time

Funnel measured across all sources, last 90 days (Jan-Mar 2026). N = 4,820 leads at top. Conversion rates are computed cohort-style: each rate is the share of the prior-stage cohort that reached the current stage within the cohort window.



### Dwell time per stage (median)

Stage	Median dwell	P90 dwell	Benchmark - B2B SaaS BR
Lead → MQL	1.4 days	9.2 days	≤24 h ideal
MQL → SQL	3.7 days	18 days	≤3 days ideal
SQL → Won	47 days	118 days	varies by ticket

## LEAKAGE ANALYSIS

## Top 3 leak stages • quantified loss

We measure leak as the gap between observed conversion and a credible benchmark (peer cohort or theoretical floor). Loss values are gross — converting at the benchmark rate would imply the indicated incremental Won deals at the segment's average contract value (R\$ 38k / deal).

#	Stage	Current	Benchmark	Implied loss / quarter
L1	Lead → MQL	32%	48% (top quartile)	R\$ 3.0M (77 deals)
L2	SQL → Won	18%	28% (peer cohort)	R\$ 2.4M (63 deals)
L3	MQL → SQL	41%	55% (top quartile)	R\$ 1.5M (40 deals)

### L1 • Lead → MQL

- **Root cause:** form-fill leads receive first touch in 6.2h on average (target ≤30 min).
- Drop-off heaviest in the 0-2h window — speed-to-lead is the single largest leverage point.
- Lead routing rules dump 23% of leads to a default queue ("unassigned"), creating triage friction.

### L2 • SQL → Won

- **Root cause:** 41% of stalled opportunities have no next-step logged after 14 days.
- Discovery-call quality varies wildly across reps — strongest 3 reps convert at 29%; bottom 3 at 9%.
- Pricing objection cited in 38% of lost deals • pricing collateral inconsistent across team.

RESPONSE-TIME SLA

## Speed-to-lead across channels

Speed-to-lead is the dominant driver of L1 conversion. We measured first-meaningful-touch time across each channel over the 90-day window. The chasm between Messaging (best) and Referral (worst) is operational, not structural — both are routable to the same SDR pool.

Channel	Volume / 90d	Avg response	P90 response	Target SLA
Form (website)	1,940	6.2 hours	37 hours	≤30 min
Messaging (WhatsApp / chat)	1,210	2.4 hours	11 hours	≤15 min
Referral	240	18 hours	82 hours	≤2 hours
Inbound (call/email)	1,430	4.1 hours	22 hours	≤30 min

### Key observations

- Referral leads — the highest-converting category (SQL → Won 38%) — receive the slowest touch.
- Messaging is closest to target but has the highest weekend volume gap (Sat/Sun 8h+ response).
- Form fill volumes spike Tue-Thu 14:00-17:00; SDR coverage is uniform — re-staff to traffic.
- Existing CRM routing rules do not consider source — proposed change in \$5 automations.

## AUTOMATION PLAYBOOK

**5 prioritized automations • impact / effort**

#	Automation	Impact	Effort	Owner
A1	Form-lead instant routing + SLA timer + nudge	High	Low	RevOps + SDR Lead
A2	Referral lead expedited lane (5-min page)	High	Low	RevOps
A3	Stalled-opp auto-task after 14d silence	Medium	Low	RevOps + AE Manager
A4	Pricing-objection playbook + collateral lib	High	Medium	Sales Enablement
A5	Weekend coverage rotation for messaging channels	Medium	Medium	SDR Lead

**Expected uplift if all 5 ship**

- Lead → MQL: 32% → 41% (recovery of ~60% of the benchmark gap).
- SQL → Won: 18% → 22% (incremental ~25 deals/quarter).
- Aggregate quarterly Won-deal lift: ~52 deals → ~R\$ 2.0M ARR.
- Net new SDR/AE headcount required: 0 (recapture from operational waste).

*"The fastest revenue lift here is not better leads — it's a 30-minute, end-to-end check on the existing routing rules."*

## STACK ASSESSMENT

## Keep · integrate · replace

Tool	Role	Verdict	Rationale
HubSpot	CRM + marketing automation	Keep	Adequate. Underused — workflows + lead scoring need rebuild
RD Station Marketing	Email + landing pages	Replace (12-18mo)	Overlaps with HubSpot; sunset reduces stack cost + dual-so
Twilio (Programmable Messaging)	Business API	Keep	Working well; add HubSpot integration via custom workflow.
Outreach	Sales engagement	Keep	Healthy adoption (74%). Coach the bottom-3 reps on cadenc
Apollo	Prospecting / contact data	Integrate	Add bidirectional sync with HubSpot (currently one-way expo
Looker Studio	Reporting	Keep + extend	Add funnel & SLA dashboards (current dashboards are pipel
Slack	Internal comms	Integrate	Add hot-lead alerts via HubSpot → Slack webhook (currentl
Chili Piper	Meeting scheduler	Evaluate	Compare against HubSpot Meetings + Cal.com — possible C

## 90-DAY ROADMAP

## Phase plan with KPIs per phase

### Phase 1 • Days 1-30 — Foundation

- A1 (instant routing) and A2 (referral lane) in production.
- Define funnel & SLA dashboards in Looker Studio.
- Pricing-objection playbook drafted with 2 senior AEs.

KPI: Form lead avg response 6.2h → ≤45 min; Referral 18h → ≤3h.

### Phase 2 • Days 31-60 — Operationalize

- A3 (stalled-opp task) live; AE manager review cadence weekly.
- Lead-scoring rebuild in HubSpot — collaborate with Marketing.
- Weekend coverage rotation (A5) staffed.
- Rep-level Outreach coaching for bottom-3 reps.

KPI: Lead → MQL 32% → 36%; SDR utilization gap narrowed by 50%.

### Phase 3 • Days 61-90 — Measure & iterate

- Quarterly funnel review • validate uplift against forecast.
- Begin RD Station sunset planning • target Q4 cutover.
- Pricing collateral library complete • usage measured.

KPI: Quarterly Won-deal volume +30 vs. baseline; SLA compliance ≥85%.

## APPENDIX · METHODOLOGY

## Data sources & method

- HubSpot CRM data export · 90 days · all objects (contact, deal, activity, task, email).
- Twilio messaging logs · 90 days.
- Outreach engagement data · 90 days.
- Looker Studio dashboards · current state.
- Interviews · 4 AEs · 3 SDRs · 1 SDR Lead · 1 VP Sales · 1 RevOps.

### Benchmark sources

- Pavilion State of Sales 2025 (B2B SaaS BR cohort).
- Hubspot Sales Benchmarks — Brazil cut · 2025.
- Anuvia internal anonymized benchmark pool (n=22 engagements).

— End of report — Anuvia · contato@anuvia.com.br · anuvia.com.br