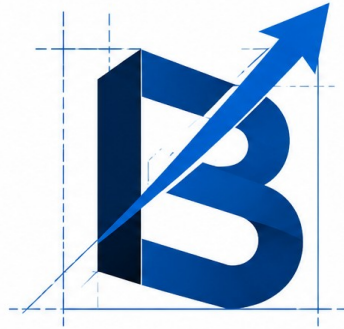




BLUEPRINT
— SALES ARCHITECTS —
BUILD | SCALE | SUSTAIN

BLUEPRINT SALES ARCHITECTS

YOUR 90-DAY REVENUE ENGINE ROADMAP

The practical implementation plan delivered after your One-Day Sales Assessment.

THE PROMISE

You will leave with a clear picture of where revenue is leaking, what to fix first, who should own each action, and how to measure whether the changes are working.

Prepared for: [CLIENT NAME]

Assessment date: [DATE]

Prepared by: Ed Petras, Founder | Blueprint Sales Architects

What You Walk Away With

The One-Day Sales Assessment is designed to replace assumptions with a fact-based view of how your sales operation actually works today. The roadmap converts those findings into a focused 90-day sequence that ownership can execute internally.

- 1 **Executive Readout**
What is working, what is not, and the few issues most responsible for lost visibility, inconsistent conversion, or owner dependence.
- 2 **Revenue Risk Map**
The highest-risk leaks across lead response, follow-up, pipeline, CRM, sales execution, forecasting, and accountability.
- 3 **Current-State Process Map**
A practical view of the lead-to-sale journey, including handoffs, gaps, unclear ownership, and stalled points.
- 4 **Prioritized 90-Day Roadmap**
A sequenced plan that separates "fix now" from "fix next" so the team does not try to change everything at once.
- 5 **Owner Scorecard**
A small set of operating metrics that tells leadership whether the new process is being adopted and whether performance is improving.

The Roadmap Is Built Around Three Outcomes

PREDICTABILITY	VISIBILITY	ACCOUNTABILITY
Know what is likely to close, when, and what activity must occur to hit the revenue target.	See lead status, next steps, pipeline health, conversion, and salesperson activity without chasing the team.	Create clear ownership, measurable expectations, and a management cadence that keeps the process running.

The 90-Day Implementation Roadmap

Your final roadmap will be customized to the findings from the assessment. The structure below shows how recommendations are converted into an owner-led implementation sequence.

DAYS 1-30 STABILIZE THE SALES FOUNDATION

OBJECTIVE Stop the most immediate revenue leaks and establish one source of truth.

OWNER ACTIONS	DELIVERABLES TO COMPLETE	SUCCESS MEASURES
Name one accountable owner for every incoming lead and active opportunity.	Lead routing standard	% leads assigned
Define the lead-response standard by source and business hours; begin measuring it.	CRM cleanup list	Median response time
Clean the active CRM pipeline: close dead opportunities, assign next steps, owners, dates, and values.	Pipeline stage definitions	% active deals with next step
Define buyer-based pipeline stages with clear entry and exit criteria.	Qualification checklist	CRM adoption/completeness
Document the minimum qualification standard and the required next step for every qualified prospect.	Weekly meeting agenda	Weekly meeting held
Set a weekly 45-minute sales operating meeting focused on pipeline, obstacles, commitments, and forecast.		

DAYS 31-60

STANDARDIZE THE CUSTOMER JOURNEY

OBJECTIVE Turn individual selling habits into a repeatable company process.

OWNER ACTIONS	DELIVERABLES TO COMPLETE	SUCCESS MEASURES
Map the standard lead-to-sale journey from first response through close and handoff.	Sales process map	Lead-to-appointment conversion
Build a minimum follow-up cadence across phone, email, text, and longer-term nurture.	Follow-up cadence	Appointment-to-proposal conversion
Standardize discovery questions around need, urgency, decision process, budget/fit, and next commitment.	Discovery guide	Follow-up completion rate
Codify the most common objections and approved response framework.	Objection guide	Stale pipeline reduction
Standardize proposal/presentation expectations and require a scheduled next step before every meeting ends.	Proposal standard	Reactivated opportunities
Launch a structured reactivation campaign for stalled and lost opportunities that still fit the target customer.	Reactivation list	

DAYS 61–90

INSTALL MANAGEMENT DISCIPLINE

OBJECTIVE Make the system visible, measurable, and sustainable without daily owner intervention.

OWNER ACTIONS	DELIVERABLES TO COMPLETE	SUCCESS MEASURES
Build a simple leadership dashboard with funnel, conversion, pipeline, activity, forecast, and revenue metrics.	Executive dashboard	Forecast vs. actual
Establish weekly 1:1 pipeline reviews using CRM data—not rep memory.	1:1 review template	Stage conversion
Set minimum activity and process expectations by role; separate leading indicators from revenue outcomes.	KPI standards	Pipeline velocity
Create a rolling 30/60/90-day forecast with confidence rules tied to buyer commitments.	Forecast model	Rep KPI attainment
Identify individual skill gaps and assign targeted coaching or practice.	Coaching priorities	Owner-involved deals
Document the first version of the Sales Playbook and assign an internal owner to maintain it.	Sales Playbook v1	Playbook compliance
Review the owner’s role: identify which approvals, deals, or follow-ups can now move to the team.		

Day 90: The Owner Review

At the end of 90 days, leadership should be able to answer five questions with data—not instinct:

- Where is every active opportunity, and what is the next buyer commitment?
- How quickly and consistently are new leads being contacted and followed?
- Where are prospects falling out of the funnel, and by salesperson/source?
- How much revenue is realistically forecast over the next 30, 60, and 90 days?
- Which parts of the sales engine still require the owner to personally intervene?

Your 90-Day Owner Scorecard

The roadmap is not complete until progress can be measured. Blueprint will recommend a small set of baseline metrics based on your business model and current data quality. The goal is not more reporting—it is better management visibility.

METRIC	WHAT IT TELLS YOU	TODAY	DAY 90
Lead Response	Median time from lead receipt to first personalized contact	[Baseline]	[90-Day Target]
Lead Coverage	% of new leads with assigned owner + next action	[Baseline]	[90-Day Target]
CRM Integrity	% of active opportunities with current stage, value, next step, and date	[Baseline]	[90-Day Target]
Lead → Appointment	% of workable leads that become appointments/discovery calls	[Baseline]	[90-Day Target]
Appointment → Sale	% of qualified appointments that close	[Baseline]	[90-Day Target]
Pipeline Aging	% of opportunities beyond expected stage age	[Baseline]	[90-Day Target]
Forecast Accuracy	Variance between committed forecast and actual result	[Baseline]	[90-Day Target]
Founder Dependence	% of active opportunities requiring owner involvement	[Baseline]	[90-Day Target]

Priority Matrix: What Gets Fixed First

Every finding is placed into one of four implementation buckets. This prevents the common failure mode of producing a long list of “good ideas” with no sequence.

FIX NOW High revenue impact + low/moderate implementation effort. Start in Days 1–30.	BUILD NEXT High impact but requires process design, CRM work, or team adoption. Days 31–60.
SYSTEMIZE Management cadence, reporting, coaching, and playbook work that makes change stick. Days 61–90.	DEFER Useful ideas that do not address the primary constraint. Capture them; do not let them distract the team.

How Blueprint Keeps the Roadmap Useful

The roadmap is intentionally designed so your team can implement it. Blueprint's role after the assessment is to create clarity, preserve accountability, and give ownership an objective way to judge progress.

Recommended Checkpoints

Day 0 — Findings Session

Align on the top 3–5 priorities, establish baselines, assign internal owners, and agree on Day-30 success measures.

Day 30 — Foundation Review

Confirm the immediate leaks have been addressed, review CRM/process adoption, and remove roadblocks before standardization work begins.

Day 60 — Adoption Review

Measure whether the team is following the new process consistently and whether funnel visibility/conversion is improving.

Day 90 — Executive Review

Compare results with the baseline, identify what stuck, what stalled, and what requires stronger sales leadership or implementation support.

AT DAY 90, THERE ARE THREE GOOD OUTCOMES

1. Your team implemented the roadmap and now owns a stronger sales system.
2. You made progress, but execution exposed a need for deeper process, CRM, coaching, or leadership support.
3. The roadmap confirmed that the business has outgrown part-time owner-led sales management and needs dedicated leadership.

The assessment is valuable even if Blueprint never does another day of work for you.

If the plan stalls because ownership lacks the time, internal leadership, or implementation capacity to drive it, Blueprint can step in as Fractional Sales Leadership to build the systems, install the cadence, coach the team, and transfer ownership back to the company.

BUILD THE SYSTEM. BUILD THE DISCIPLINE. MAKE REVENUE MORE PREDICTABLE.

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