Gap Analysis for Enterprise Sales Stacks

Seven steps for finding where your revenue tools drop the deal, and what to fix first.

For: Enterprise teams
As of October 26, 2026

Each tool in a large revenue stack does its job. The trouble is in the handoffs, the points where data moves from one tool to the next. A gap analysis finds the handoffs where data stops, gets retyped by hand, or arrives late. This guide gives you the seven steps, the four handoffs that break most often in a typical stack, and the samples of what you'd receive.

What You Need

Doug starts with a real deal, not a tool list. He follows it through every system it touches and marks each handoff clean, manual or broken.

- **One real deal.** Pick a deal you can trace from first signal to invoice.
- **A list of your tools.** For each one: who owns it, who uses it, and what data goes in and out.
- **An owner for each handoff.** You'll name them in step 6.
- **An executive sponsor.** The monthly stack review brings decisions to this person.
- **A 30, 60 and 90 day window.** That's the rollout in step 7.

The Sample Stack

The sample stack has eight tools: account research, marketing automation, a CRM (customer relationship management tool, the system that tracks accounts and deals), quoting and pricing, contracts and e-signature, billing, customer success, and a forecast dashboard. It's illustrative. It isn't a client.

Tool Inventory

Tool	Owner	Users	Data in	Data out
Account research				
Marketing automation				
CRM				
Quoting and pricing				
Contracts and e-signature				

Tool	Owner	Users	Data in	Data out
Billing				
Customer success				
Forecast dashboard				

Research

Finding	Figure	Source
Share of the week reps spend selling	40%	Salesforce, State of Sales survey, August to September 2025
Reps who say the number of tools overwhelms them	42%	Salesforce, State of Sales survey, August to September 2025
Handoffs in the sample stack	8 total: 4 move data on their own, 4 break	Doug's sample stack diagram. Illustrative, not a client

Salesforce report: State of Sales report (PDF)

The Eight Handoffs in the Sample Stack

Handoff	Status
Marketing automation to CRM	Moves data on its own
CRM to forecast dashboard	Moves data on its own
Quoting to contracts	Moves data on its own
Billing to customer success	Moves data on its own
1. Research to CRM	Breaks
2. CRM to quoting	Breaks
3. Contracts to billing	Breaks
4. Customer success to CRM	Breaks

Source: Doug's sample stack diagram. Illustrative, not a client.

Step by Step

Each step ends with a test, so you know when you're ready to move on.

Step 1: Inventory

List every tool, who owns it, who uses it, and what data goes in and out.

Use the inventory table in What You Need. Include every tool a deal touches.

Ready when: Every tool has an owner, its users, and its data in and out written down.

Step 2: Map to the Buyer Journey

Lay the tools over the path a buyer takes, from first trigger to renewal.

The path has six stages: trigger, build the group, shape the solution, executive approval, contract and start, and renewal. Our guide How Enterprise Buyers Move covers each one.

Ready when: Every tool sits on a stage of the buyer's path.

Step 3: Find the Broken Handoffs

Trace real deals. Mark where data stops, repeats, or arrives late.

Mark each handoff clean, manual or broken. Clean means data moves on its own. Manual means someone retypes or forwards it. Broken means it stops or arrives too late.

Ready when: Every handoff is marked clean, manual or broken, with a real deal as evidence.

Step 4: Measure the Cost

Count delay in days, deals touched, and revenue waiting at each gap.

Time to buyer is the days from the first qualified signal to the first meeting with the person who owns budget.

Ready when: Each broken handoff has its delay in days, deals touched and revenue waiting.

Step 5: Rank by Dollars

Rank the gaps by what they cost. Fix the top ones first and leave the rest alone.

Put the costliest gap at the top of the list.

Ready when: The gaps are in cost order, and you've picked the top ones to fix first.

Step 6: Design the Target Workflow

Draw the flow that should exist. Name the data fields, the rules, and the owner of each handoff.

A data field is one fact that moves between tools, such as a signed start date.

Ready when: Every handoff has named data fields, rules and one owner.

Step 7: Roll Out in 30, 60 and 90 Days

Ship the highest-value fixes first. Check each one against the pipeline.

Work in three windows, at 30, 60 and 90 days, and start with the fixes worth the most.

Ready when: Each fix has shipped in order of value and been checked against the pipeline.

What You Receive

Deliverable	What it is	Sample
Stack Map	One picture of how your revenue tools connect today. It shows every tool, its owner and its users, the data in and out of each tool, and each handoff marked clean, manual or broken.	Stack Map sample
Gap Report	A ranked list of what is slowing deals, with evidence. It shows each broken handoff on a real deal, the delay and the dollars at stake, and a rank, an owner and a recommended fix.	Gap Report sample
Workflow Blueprint	The repeatable system that closes the gaps. It has the target flow drawn end to end, the data fields, rules and who does what, and a 30, 60 and 90 day rollout with the numbers to track.	Workflow Blueprint sample
Monthly Stack Review	After the 90 days, a monthly review keeps the gains. It shows the scorecard, what closed, new findings, decisions for your executive sponsor, and the next 30 days.	Monthly Stack Review sample

Every sample uses a made-up client and illustrative figures. They show the format, not results.

Troubleshooting

Problem	Likely cause	Fix
1. Research to CRM: the rep who owns the account never sees signals and works a stale list. Warm signals go cold before anyone acts.	Signals sit in a research tool and never reach the account record.	Write each signal to the account record and route it to the owner the same day.
2. CRM to quoting: the quote no longer matches the plan, late-stage deals wait on approvals, and someone redoes quotes.	Pricing and scope change in email.	Quote from the CRM record. Send price and scope changes through one approval step with a named owner.
3. Contracts to billing: start dates and amounts drift from what the buyer agreed to. Invoices go out wrong and finance chases the fixes.	Someone retypes the signed terms by hand.	Pass signed terms to billing as fields, not as a PDF. Check the first invoice against the contract.
4. Customer success to CRM: risk shows up late, with the renewal close. Save plays start too late.	Health and risk don't reach the CRM record, so the account owner is the last to know.	Send health and risk flags to the CRM record as they change. Alert the owner at a set threshold.

Problem	Likely cause	Fix
The list of fixes feels too long to start.	Every gap looks urgent.	Rank the gaps by what they cost. Fix the top ones first and leave the rest alone.

Doug can set this up with you. Book a discovery call at mayberryadvisory.com.