

ONGOING REVIEW

Monthly Stack Review

Sample for month 3, the first review after the 90 day rollout. It shows what a client receives each month.

Client Reliquary Trading Co. (sample)	Prepared by Mayberry Advisory	Date October 2026	Period Month 3
\$5.8M to \$1.5M estimated annual revenue at risk, start to now	5 of 9 handoffs rated clean (was 3)	3 new findings this month	

Scorecard

Metric	Baseline	Now	Target	Status
Form to first seller touch	3.4 days	3 hours	Under 4 hours	Met
Added days at quote re-keying	11 days	3 days	2 days	In progress
Renewal risk lead time	20 days	65 days	90 days	In progress
Forecast data age at the call	8 days	Under 1 day	Under 1 day	Met
Trigger to seller action	6 days	2 days	1 day	In progress
Handoffs rated clean	3 of 9	5 of 9	8 of 9	In progress

Gap Status

#	Gap	Status	At risk at start	At risk now
1	Marketo Engage to Salesforce	Closed	\$2.1M	\$0.1M
2	Salesforce to DealHub	In progress	\$1.4M	\$0.5M
3	Gainsight to Salesforce	In progress	\$1.1M	\$0.6M
4	Salesforce to Clari	Closed	\$0.7M	\$0.1M
5	6sense to Outreach	In progress	\$0.5M	\$0.2M
Total			\$5.8M	\$1.5M

The dollar figures are estimates of exposure, not recovered revenue. Sales leadership should treat the movement as a direction, and the scorecard above as the proof.

New Findings This Month

Finding	Evidence	Recommended action
Duplicate contacts after the new routing rules	212 duplicate records created in 30 days (sample).	Add a match rule on email and account before a lead is created.
Wrong renewal dates on new contracts	6 of 41 signed contracts posted a date that differs from the signed term (sample).	Add a field check between DocuSign and NetSuite.
Partner referrals skip routing	Referral leads still go to a shared inbox (sample).	Send referrals through the same routing rules.

Decisions Needed From the Executive Sponsor

Decision	Why it matters	Needed by
Approve a change window for the DealHub field mapping.	Closes the last of gap 2.	Next review
Name an owner for partner referral routing.	Without an owner the new finding stays open.	Next review

Next 30 Days

Work	Owner
Finish the DealHub field mapping and retire the re-key step.	Deal desk
Raise renewal risk lead time from 65 to 90 days by adding usage alerts to the risk flag.	CS ops
Fix the duplicate contact rule. Fix the renewal date check.	RevOps, finance
Rescore the Stack Map and re-rank the gaps.	Mayberry Advisory

Review Rhythm (sample)

Cadence	What happens
Weekly	A 15 minute check on the five metrics. Flags anything that moved the wrong way.
Monthly	This review. Scorecard, gap status, new findings, decisions, next 30 days.
Quarterly	Rescore the Stack Map. Re-rank the gaps. Update the Workflow Blueprint.