The year-end GTM audit for B2B SaaS: 15 checks before you plan 2027

Five checks on leads, five on sales, five on retention. Most take ten minutes and need nothing beyond your CRM. Mark each one **Pass**, **Fail** or **Can't answer**. The number of fails matters less than **where they cluster**: that is where your revenue is leaking.

COMPANY _____

DONE BY _____

DATE _____

☐ Pass ☐ Fail ☐ Can't answer

01–05 Leads

Are you paying to attract people who never buy?

1 Do your recent closed-won customers look like your recent leads?

10 min · CRM

Pull your **last 10 closed-won** accounts and your **last 50 leads**. Compare size, industry and role.

RED FLAG They don't match. Your targeting has drifted, and more spend makes it worse.

Where they differ: ..... ☐ Pass ☐ Fail ☐ Can't answer

2 What actually happened in the first 48 hours after your last 20 leads arrived?

10 min · CRM

Not what the process says. Check the CRM timestamps.

Average first response across 939 B2B SaaS companies: **47 hours**. Contacted inside 5 min, leads close at **32%**; after 24 hours, **12%**.[1]

Typical wait: ..... hrs Contacted within 24h: ..... of 20 ☐ Pass ☐ Fail ☐ Can't answer

3 How many channels are you running, and how many produced a customer this year?

15 min

List each channel with the number of customers it produced. Pick two, give them everything.

RED FLAG Effort spread so thin that no channel gets long enough to prove itself.

Channels → customers: ..... ☐ Pass ☐ Fail ☐ Can't answer

4 Do you have a baseline for how you show up in AI search?

20 min

Ask a model **10 buyer-style prompts** in your category and count how often you are named. 81% of B2B buyers now use one.[2]

Named in ..... of 10 prompts Competitors named instead: ..... ☐ Pass ☐ Fail ☐ Can't answer

5 Are your money pages actually reachable?

10 min

Run a link check on the pages a buyer lands on **before they contact you**.

RED FLAG Any broken link on a page meant to send people somewhere.

Broken links found: ..... On which pages: ..... ☐ Pass ☐ Fail ☐ Can't answer

06–10 Sales

Where do your deals actually die?

6 Is your sales process written down?

5 min

Not the CRM stage names. The **criteria**: what must be true before a deal moves to the next stage, and who decides.

RED FLAG Deals still need the founder in the room to progress.

Where it lives: ..... ☐ Pass ☐ Fail ☐ Can't answer

7 Where do deals stall, and is it always the same place?

15 min · CRM

Pull every deal that went quiet this year. Note the stage it died in. One stage = a fixable process problem.

RED FLAG They die everywhere. You are probably selling to the wrong people.

Stage most deals die in: ..... ☐ Pass ☐ Fail ☐ Can't answer

8 How many people are you talking to inside each account?

10 min · CRM

Count the contacts on your **last 10 open deals**. B2B SaaS purchases involve six to ten people.

RED FLAG One or two contacts: a lone champion selling for you, without the material.

Average contacts per deal: ..... ☐ Pass ☐ Fail ☐ Can't answer

9 Does every demo end with the next step booked?

10 min · calendar

Check your **last 20 demos**: a specific date in a calendar, or "I'll follow up next week"?

Ended with a booked date: ..... of 20 ☐ Pass ☐ Fail ☐ Can't answer

10 Do you know why you lose deals?

15 min · CRM

Pick **5 lost deals** from this year. Did anyone record a real reason? "Price" and "timing" are what people say, not what happened.

Real reason recorded: ..... of 5 Most common: ..... ☐ Pass ☐ Fail ☐ Can't answer

The reasoning behind every check: https://theclueless.company/blog/gtm-audit-for-b2b-saas/

Retention and scorecard overleaf →

11–15 Retention

How much ARR is leaving quietly?

11 What is your first-90-day churn rate?

15 min · billing

Most first-year churn lands in the first 90 days, and the largest share in month one, before any renewal conversation.[3] A high number points at onboarding and at who sales signed.

Churned within 90 days: ..... % Within 30 days: ..... % ☐ Pass ☐ Fail ☐ Can't answer

12 Which accounts have gone quiet?

10 min · product data

Sort customers by **last login or usage over 60 days**. Customers decide to leave long before they tell you. The first sign is silence, not a complaint.

Quiet accounts: ..... ARR at risk: ..... Contacted yet? ..... ☐ Pass ☐ Fail ☐ Can't answer

13 Is your net revenue retention getting better or worse?

30 min · billing

Not one blended number. Group customers by the **quarter they signed** and work out NRR for each of the last four groups.

RED FLAG NRR falls from one group to the next. Something changed in who you are signing.

COHORT _____ NRR	COHORT _____ NRR	COHORT _____ NRR	COHORT _____ NRR

Direction: ..... ☐ Pass ☐ Fail ☐ Can't answer

14 Who is responsible for your existing customers?

1 min

Name one person. Accounts churn quietly when nobody is accountable for noticing.

RED FLAG The answer is "everyone" or "the founder".

Name: ..... ☐ Pass ☐ Fail ☐ Can't answer

15 Can you see every renewal date for the next two quarters?

5 min · CRM

Time yourself pulling the list. Over five minutes means you are reacting to renewals, not managing them.

Time taken: ..... min Renewals due: ..... ARR up for renewal: ..... ☐ Pass ☐ Fail ☐ Can't answer

Your scorecard

SECTION	FAIL	CAN'T ANSWER
Leads · 1–5	.....	.....
Sales · 6–10	.....	.....
Retention · 11–15	.....	.....
Total of 15	.....	.....

What your fails tell you to fix

Mostly leads
A targeting or channel problem. Adding budget before fixing it makes the leak bigger.

Mostly sales
A process problem, almost always undocumented criteria. The cheapest to fix and usually the fastest to show results.

Mostly retention
The expensive one, because it compounds. It disguises itself as a lead problem: you need new logos just to stand still.

Spread evenly
Usually one data problem, not three. Fix what you capture first, then run this again next quarter.

> ***If you could not answer five or more of these, the finding is not that your engine is broken. It is that you cannot see it.***
>
> That is a different and more urgent problem, and no amount of 2027 budget solves it.

What is a GTM audit? A structured check of where a B2B SaaS company loses revenue across acquisition, sales and retention. Unlike a sales or marketing review, it looks at all three together, because a leak in one part usually shows up as a symptom in another. Run it before you set next year's budget, not after.

Found the leak but not the time to fix it?

The Clueless Company fixes revenue for B2B SaaS companies from $0.5M to $10M+ ARR: leads, sales and retention, inside your own tools.

https://theclueless.company

Sources. [1] Optifai Pipeline Study: CRM timestamp data from 939 B2B SaaS companies, Q2 2025 – Q1 2026. [2] 6sense Buyer Experience Report 2026 (only 17–21% of buyers name LLMs as an influential source). [3] Recurly, 2025 research across 2,200+ subscription businesses.