GTM EXECUTION RISK AUDIT

A PE-Grade Assessment for Capital-Constrained Markets

In a market where capital is constrained and exits are selective, returns depend on execution—so GTM decisions must hold up under investor scrutiny.

A 30-day, operator-grade GTM Execution Risk Audit that evaluates whether revenue systems, spend, and workflows can reliably support returns in today's market — and where assumptions break down.
The audit focuses on **efficiency, feasibility, and downside protection**, not growth narratives.

Purpose (For OPs & Portco CEOs)

Provide decision-grade clarity on what to invest in, what to pause, and what is feasible in the next 90–180 days — so GTM choices hold up under investor scrutiny.

Built for value-creation teams that need:

- Fast visibility into EBITDA-impacting GTM levers.
- Early identification of execution risk before capital is committed.
- A repeatable, portfolio-wide GTM assessment across portcos.
- Clear, sequenced recommendations for the next 90–180 days.

This is not a marketing audit. It is an execution-risk and unit-economics assessment designed for value creation under constraint.

What We Assess

1. Acquisition Efficiency
Channel-level CAC drivers, spend discipline, targeting accuracy, creative effectiveness, wasted spend exposure.

2. Conversion & Funnel Economics
Website/landing performance, funnel leakage, UX friction, tracking integrity, revenue loss points.

3. Messaging & Commercial Clarity
ICP alignment, positioning clarity, value articulation, creative testing maturity.

4. Revenue Operations
GA4 accuracy, CRM → revenue pathways, attribution reliability, lead routing, reporting confidence.

5. AI & Workflow Efficiency (GTM)
Automation opportunities that reduce labor drag, shorten cycles, and improve reporting efficiency.

6. Benchmarks & Portfolio Context
Peer-set comparison with red/yellow/green risk scoring to assess relative GTM health and feasibility.

Deliverables (What OPs Actually Get)

Designed to be forwarded—IC- and board-ready.

GTM Scorecard (PE-Grade)	Six execution pillars scored 1–5, highlighting risk zones and EBITDA impact.
Efficiency & Waste Report	Identification of **20–40% spend inefficiencies** and non-productive GTM activity.
EBITDA Levers Map	3–7 prioritized actions tied directly to **CAC reduction, margin improvement, or efficiency gains.**
AI Opportunity Plan	Time and cost-saving opportunities across GTM workflows and operations.
100-Day Value Creation Plan	Sequenced actions with owners, timelines, risk flags, and expected financial impact.
Executive Summary (2–3 pages)	Board- and IC-ready summary outlining risks, tradeoffs, sequencing, and defensibility.

Timeline (21–30 Days)

Week 1:	Intake & data access
Week 2:	Deep analysis & execution-risk scoring
Week 3:	EBITDA levers, efficiency opportunities, and sequencing
Week 4:	Executive readout + next-step recommendations

What this enables (Observed Ranges)

- 10–30% CAC reduction.
- 15–25% spend efficiency gains.
- 5–15% revenue lift from conversion improvements.
- 20–40% workflow cost reduction via AI & automation.
- Faster, more defensible GTM decision-making across the portfolio.

Outcome

A **30-day PE-grade assessment** that reveals the fastest, most defensible path from:

Execution clarity → Efficiency gains → EBITDA improvement → Portfolio-wide prioritization

Next Steps

Pressure-test GTM assumptions **before LP or IC scrutiny.** Compare portcos using a consistent scorecard. Prioritize where to invest, pause, or restructure GTM spend.

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