LYNR

Revenue Readiness

Sample Diagnostic & Handback Pack

An illustrative example of how Lynr diagnoses a field-execution problem, prioritises the commercial gaps, builds the operating system, and hands it back ready to run.

DIAGNOSE	BUILD	EMBED	HAND BACK
Replace assumptions with evidence	Create the field system	Put standards into workflow	Leave clear ownership

ILLUSTRATIVE CLIENT PROFILE

Mid-market B2B SaaS | SDR + AE team | EMEA | Existing CRM and call-intelligence stack

This pack is compiled from Lynr diagnostic and enablement delivery frameworks. It is not a client case study, does not contain client data, and does not promise a specific result.

WHAT THIS SAMPLE SHOWS

One problem. One build. One clean handback.

The proof is not a strategy deck. It is the structure of the work, the specificity of the outputs, and the ownership left behind.

> **THE ILLUSTRATIVE PROBLEM**
> The sales team has plenty of content and activity, but field execution varies by rep and manager. Qualification is inconsistent, playbooks sit outside the workflow, onboarding is content-led rather than milestone-led, and managers inspect pipeline more often than behaviour.

SIGNAL A five-working-day diagnostic identifies where field execution is breaking, the commercial impact, and what should be built first.	**REVENUE READINESS SPRINT** A four-week build creates the standards, playbooks, coaching rhythm, onboarding path, and adoption measures the team will actually run.
CLIENT-OWNED OUTPUT Every asset is built in the client environment, documented, assigned to a named owner, and delivered against a written Definition of Done.	**MEASURED ADOPTION** Success is measured through leading and lagging indicators such as ramp time, qualification completeness, stage conversion, coaching cadence completion, and handoff quality.

> **OPERATING PRINCIPLE**
> Training supports the operating system; it is not the product. The team learns the agreed standard in the flow of real work and live deals, while managers receive the reinforcement rhythm required to keep it in place.

EXAMPLE SIGNAL FINDING

The issue is not missing content. It is a fragmented field system.

Illustrative finding 03 of 08 - Sales execution and adoption

CURRENT STATE	Sales standards exist in separate documents and manager habits. Reps do not experience one consistent workflow from qualification through close.
EVIDENCE	Call reviews show variable discovery depth. CRM fields are completed inconsistently. Managers use different deal-review questions. New-hire milestones are not tied to observed capability.
BUSINESS IMPACT	Meeting quality, stage progression and forecast confidence vary by team. Enablement effort becomes shelfware, ramp takes longer, and performance depends heavily on individual managers.
PRIORITY	**HIGH - Build the field system before adding more training content or tooling.**

RECOMMENDED INTERVENTION

SALES ENABLEMENT & REVENUE READINESS SPRINT

Build one shared discovery and qualification standard, embed SDR and AE plays into CRM workflow, establish manager call/deal review rhythms, create role-specific onboarding and certification, and measure adoption through a named scorecard.

MEASURED THROUGH

RAMP TIME	STAGE CONVERSION	QUALIFICATION COMPLETENESS	COACHING CADENCE COMPLETION

DIAGNOSTIC SNAPSHOT

Eight areas assessed before anything is built.

The objective is to replace assumptions with evidence and protect what is already working.

DIAGNOSTIC AREA	STATUS	ILLUSTRATIVE EVIDENCE
Business & GTM context	GREEN	Commercial priorities and target segments are broadly clear.
SDR pipeline generation	AMBER	Activity is visible, but qualification and feedback loops vary by manager.
AE discovery & closing	RED	Discovery, MEDDPICC use and stage progression are inconsistent.
Messaging & positioning	AMBER	Core narrative exists, but objection handling and proof usage vary.
Manager & coaching	RED	1:1s and deal reviews are not run to one coaching standard.
CRM & data	AMBER	Key fields exist but are not embedded as part of the selling workflow.
Onboarding & ramp	RED	Onboarding is content-led, with limited milestone or certification gates.
Change readiness	AMBER	Executive sponsorship exists; manager capacity and adoption ownership need tightening.

Diagnostic evidence typically includes stakeholder interviews, CRM field and stage review, call samples, sequence performance, onboarding materials, manager cadences, and adoption readiness.

PRIORITY MATRIX

The build starts with the highest-leverage gaps.

Not every weakness becomes a Sprint deliverable. The work is prioritised by commercial impact, adoption risk and client capacity.

PRIORITY	GAP	COMMERCIAL IMPACT	RECOMMENDED BUILD
P0	**Discovery and qualification standard**	Deals progress without one observable standard.	Build a five-stage discovery rubric and agreed qualification model; embed prompts and required evidence into CRM.
P0	**Manager reinforcement rhythm**	Coaching quality depends on the manager.	Create one call-review and deal-review cadence with scorecards, owners and escalation rules.
P1	**Role-specific onboarding**	New hires consume content but are not certified against real capability.	Create 30/60/90 milestones, shadow requirements, roleplays and observed certification gates.
P1	**SDR-to-AE handoff**	Context and qualification quality vary by meeting.	Define the handoff note, PACT evidence, AE feedback score and inspection rhythm.
P2	**Content and battlecards**	Useful assets exist but are not consistently used.	Connect the most important assets to deal stages and manager coaching; retire unused content.

SPRINT RECOMMENDATION

Proceed with a four-week Sales Enablement & Revenue Readiness Sprint. Protect the existing ICP and messaging work; focus the build on field standards, manager reinforcement, onboarding and adoption measurement.

ILLUSTRATIVE FOUR-WEEK BUILD

The Sprint moves from evidence to a field system the team can run.

Each week has a working output, an owner and a decision gate.

WEEK 1	**Define the standard** • Confirm ICP, buying roles and priority sales motion • Agree discovery and qualification standard • Map current CRM stages, fields and handoff points • Set Definition of Done and adoption owners
WEEK 2	**Build the field workflow** • Create SDR and AE playbook structure • Build discovery scorecard and qualification evidence • Define SDR-to-AE handoff and AE feedback loop • Draft manager call and deal review templates
WEEK 3	**Embed and test** • Place prompts, fields and assets into CRM workflow • Pilot playbooks and scorecards on live calls/deals • Run manager calibration and rep practice • Refine onboarding milestones and certification gates
WEEK 4	**Launch and hand back** • Train the team on the agreed standard in real work • Publish operating cadences and adoption scorecard • Assign owners, review dates and escalation rules • Complete handover pack and 30-day adoption plan

WEEKLY GOVERNANCE

One 20-minute client checkpoint confirms decisions, removes blockers and protects scope. Working sessions happen inside the client environment with the named owners who will run the system after handback.

WHAT LYNR BUILDS

A field system, not a folder of content.

The operating model connects standards, workflow, reinforcement, measurement and ownership.

1. SALES STANDARD	Discovery structure, qualification evidence, stage criteria, objection response and close discipline.
2. WORKFLOW	CRM prompts, required evidence, handoff notes, task triggers and approved assets placed where reps use them.
3. MANAGER RHYTHM	Call review, deal review, 1:1 coaching, forecast inspection and certification cadence.
4. ONBOARDING	Role-specific 30/60/90 milestones, shadows, roleplays, observed calls and capability gates.
5. ADOPTION	Named owners, scorecard, review dates, change champions and a process for updating the playbook.

THE DIFFERENCE

TRADITIONAL TRAINING	LYNR EXECUTION
Content is delivered, attendance is tracked, and behaviour is left to individual managers.	The standard is built into workflow, practised in live work, reinforced by managers, measured, documented and owned by the client.

EXAMPLE OPERATING STANDARDS

A few examples from the handback pack.

The final build is adapted to the client. These examples show the level of practical detail, not a universal methodology.

PACT QUALIFICATION STANDARD

Every SDR-booked meeting records Pain, Access, Capacity and Timeline before handoff. The AE re-confirms the pain in the opening minutes and rates handoff quality after the call.

STANDARD	WORKING RULE	OPERATING ASSET
DISCOVERY	Set agenda -> current state -> quantify impact -> future state -> agreed next step	Discovery scorecard + call review
QUALIFICATION	Use PACT for meeting quality and MEDDPICC, or the client standard, for active opportunities	Required CRM evidence + deal review
HANDOFF	Named contact, trigger, confirmed pain, qualification status, objections and recommended discovery angle	Handoff note + AE quality rating
MANAGER COACHING	Numbers check, one sequence/deal, one call, one behaviour to change, blockers	Logged 1:1 + weekly call/deal review
ONBOARDING	Role-specific milestones tied to observed capability, not content completion	30/60/90 plan + certification gates

EXAMPLE MANAGER RHYTHM

WEEKLY CALL REVIEW

One call per rep scored against the agreed rubric. One behaviour is selected, practised and checked again.

BI-WEEKLY DEAL REVIEW

Top deals reviewed against qualification gaps, champion strength, Mutual Close Plan and next customer action.

WEEKLY FORECAST

Commit, Best Case and Pipeline are confirmed against evidence-based criteria, not manager confidence.

MONTHLY WIN/LOSS LOOP

Patterns from won and lost deals feed updates to plays, coaching and CRM guidance.

HANDBACK AND MEASUREMENT

The work leaves with the client - documented, owned and ready to run.

Handover quality is part of the product, not an administrative step at the end.

OPERATING PLAYBOOK Role-based plays, discovery and qualification standards, objection logic, handoff rules and stage guidance.	**MANAGER PACK** 1:1, call review, deal review, forecast and win/loss templates with owners and cadence.
ONBOARDING PATH 30/60/90 milestones, shadows, practice, certification gates and role-specific evidence.	**CRM GUIDANCE** Required fields, prompts, stage criteria, asset links and adoption reporting defined for the client system.
ADOPTION SCORECARD Leading and lagging indicators, review frequency, owner, data source and escalation rule.	**GOVERNANCE RECORD** Version owner, review date, approved exceptions, decision rights and update process.

MEASUREMENT FRAMEWORK

MEASURE	WHAT IT TELLS US	OWNER / RHYTHM
RAMP TIME	How quickly a new hire reaches agreed capability milestones.	Enablement + manager / monthly
QUALIFICATION COMPLETENESS	Whether required evidence exists before stage progression.	Sales Ops + managers / weekly
STAGE CONVERSION	Where improved field behaviour is changing deal progression.	RevOps + Sales / monthly
COACHING CADENCE COMPLETION	Whether managers are reinforcing the standard consistently.	Sales leadership / weekly

THE NEXT STEP

Start with a 20-minute conversation.

Bring the revenue workstream that is not moving. Lynr will tell you whether it needs Signal, a focused Sprint, or a different route entirely.

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